

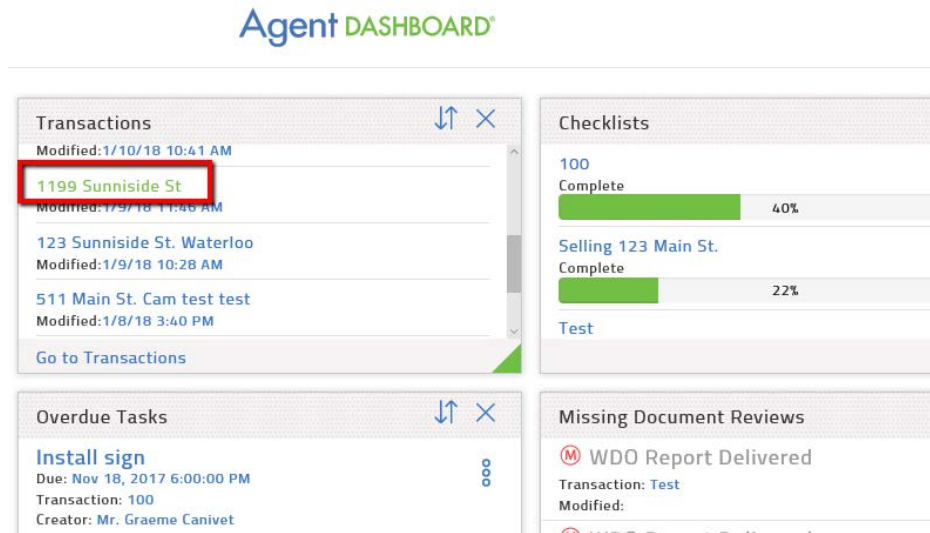
Email a Form from a Transaction


Summary

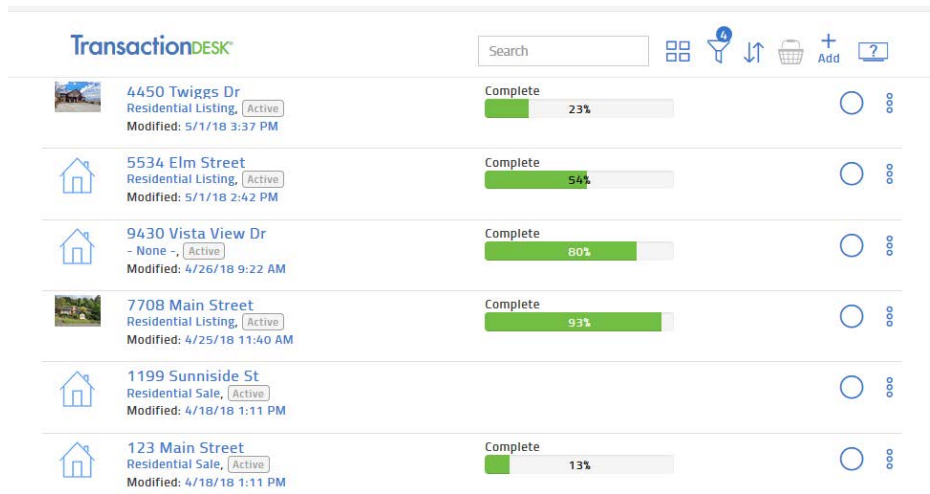
Describes how to send a form that is attached to a transaction via email.

Steps

1. Navigate to the transaction in one of the following ways:
 - In the Agent dashboard, with the Transactions widget visible, click on the transaction name to open the transaction.



- Click the TransactionDesk icon  , locate the transaction in the list, and click on the transaction name to open the transaction.



- In the right-hand menu, select **Forms**. The list of forms attached to the transaction appears.


The screenshot shows a 'Forms' section with a search bar and several utility icons (help, warning, trash, add). Below the search bar, there is a list item for 'Listing Agreement' with a document icon, a 'Modified: 1/9/18 4:18 PM' timestamp, and a three-dot menu icon on the right.

- Click the More Options menu  and select **Send**. The Send page appears.

The screenshot shows a 'Send' menu with a red 'Close' button at the top left. Below the title 'Send', there are two options: 'Email' and 'Fax', both in blue text.

- Click **Email**. The Email page appears.

The screenshot shows an 'Email' configuration page with a red 'Close' button and a blue 'Send' button. The page has three tabs: 'Information' (selected), 'Items', and 'Fax-Back'. The 'Information' tab contains the following fields and options:

- Recipient Name:
- Recipient Email *: 
- Add CC:
- Add BCC:
- Subject:
- Message:
- Send as a link:
- Send as attachment:
- Allow editing of forms?:
- Expiration Date:

- Optional: In the **Recipient Name** field, enter the name of the person you are sending the email to.

6. In the **Recipient Email** field, enter the email address to send the form to. You can type the email, or click the contact icon to see the list of contacts for the transaction, and select the contact from that list.
7. Optional: Add any CC or BCC email addresses required.
8. Optional: In the **Message** field, enter a brief message to the recipient.
9. By default, the email sends a link to the form. If you want to attach the form to the email instead, select **Send as attachment**.
10. If you are sending a link to the form, and you want to allow the recipient to edit the form, check **Allow editing of forms**.
Tip: Use this option if you are sending the form for signing.
11. If you are sending a link to the form, and you want the link to expire after a certain period of time, in the **Expiration Date** field, enter the date to expire the link.
12. To confirm what form is being sent, click the **Items** tab, and review what will be sent.
13. If the form you are sending is to be faxed back to you, click the Fax-Back tab and check Include **Fax-Back Cover Sheet**.
14. Click **Send**.