Send Reference Docs & Links from a Transaction

Your company may use the *Reference* page as a library for frequently used forms, disclosures, training materials, and other documents or links your team needs to access regularly.

Send an email from the Reference page and associate it with a transaction to record it in the transaction's *Notes & Sent Emails* and *Transaction History*.

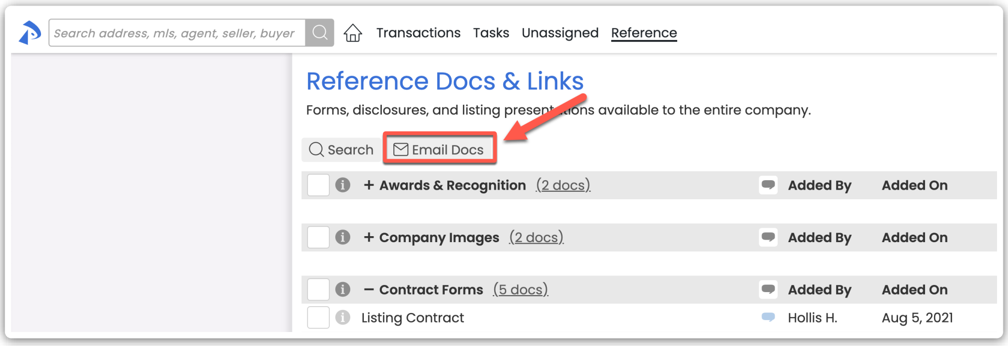
Send Reference Docs & Links from a Transaction

Email *Reference* docs or links and associate the message with a transaction.

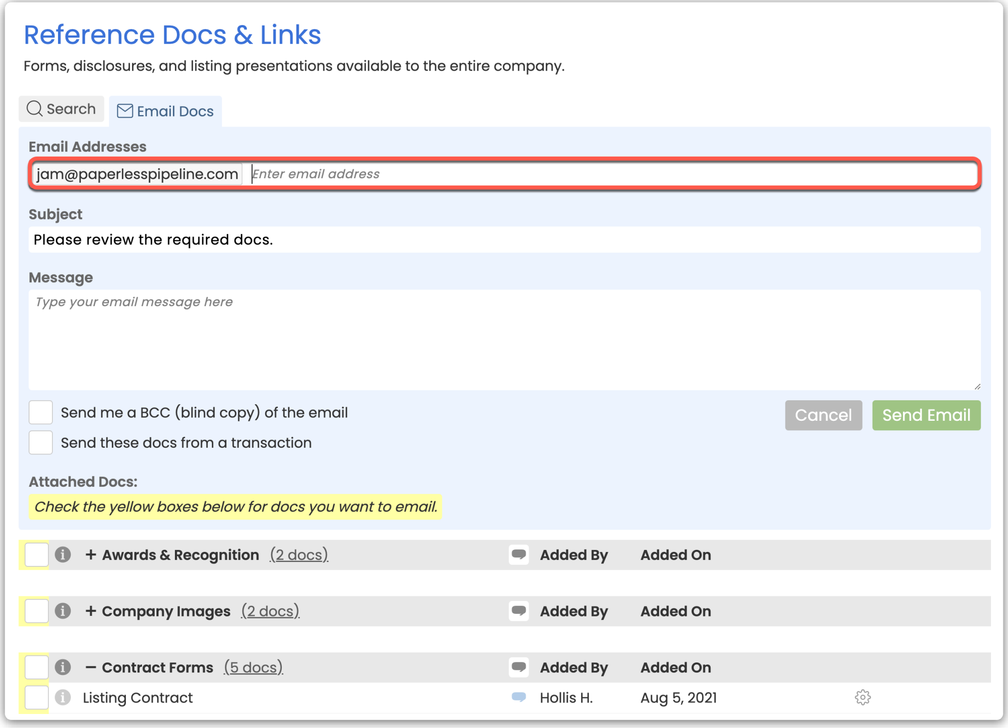
Who Can Do This? Agents and admins.

To send *Reference* docs or links and associate the message with a transaction:

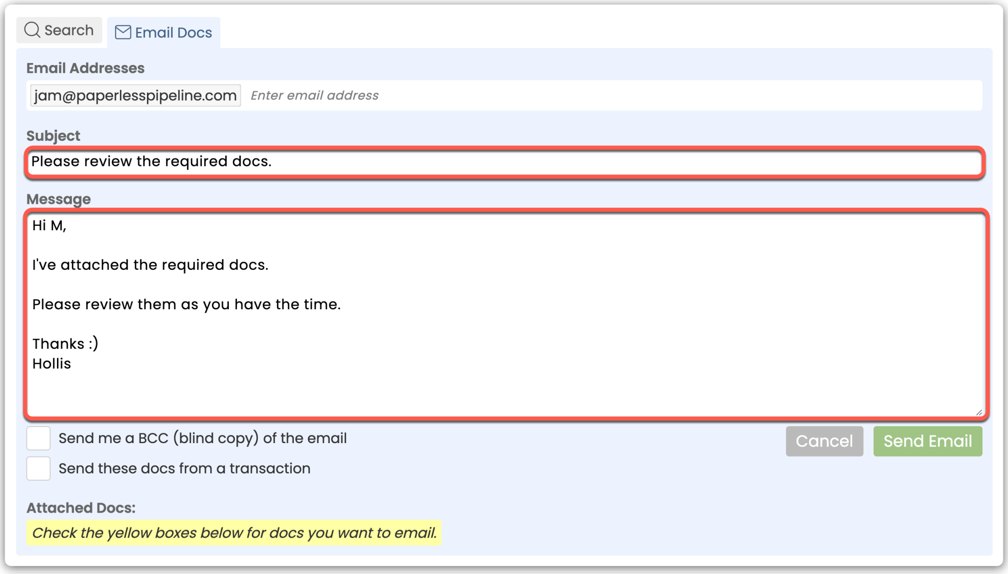
1. **Go to the Reference page** by clicking [Reference] from the top menu.
2. **Click [Email Docs] at the top of the page**



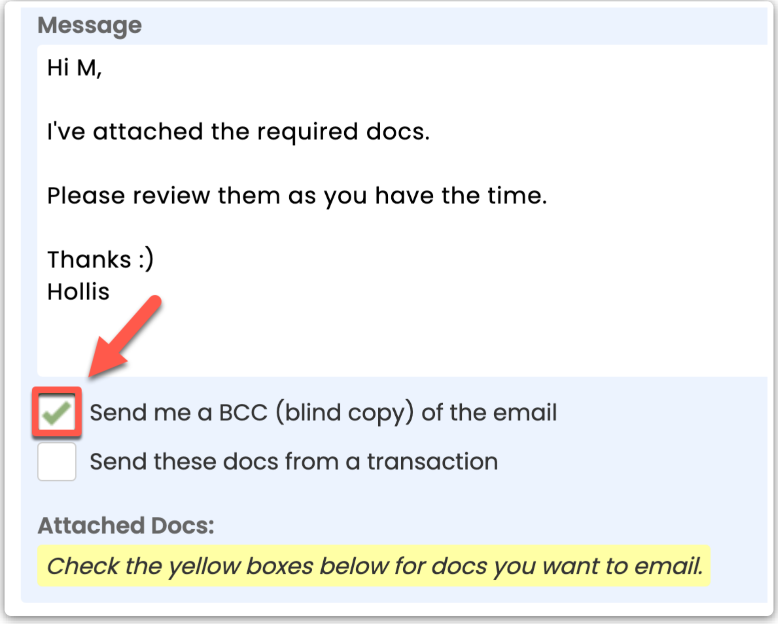
3. **Add Recipients** by entering the *Email Address* of the person you want to send the *Reference* doc to. In a later step, you will also have the option to add *Agents*, *Contacts*, and *Staff* from the transaction as recipients.



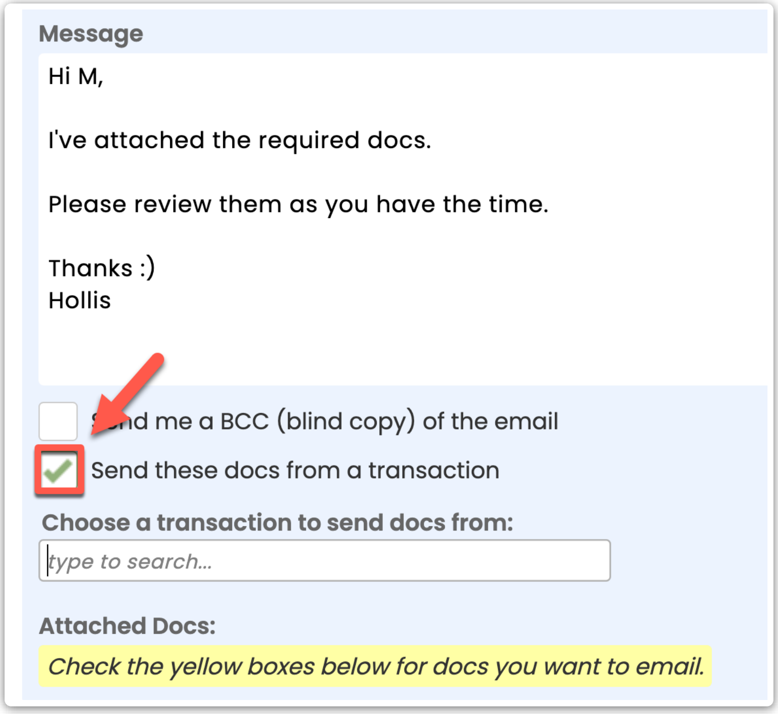
4 Optionally, add a *Subject* and *Message*.



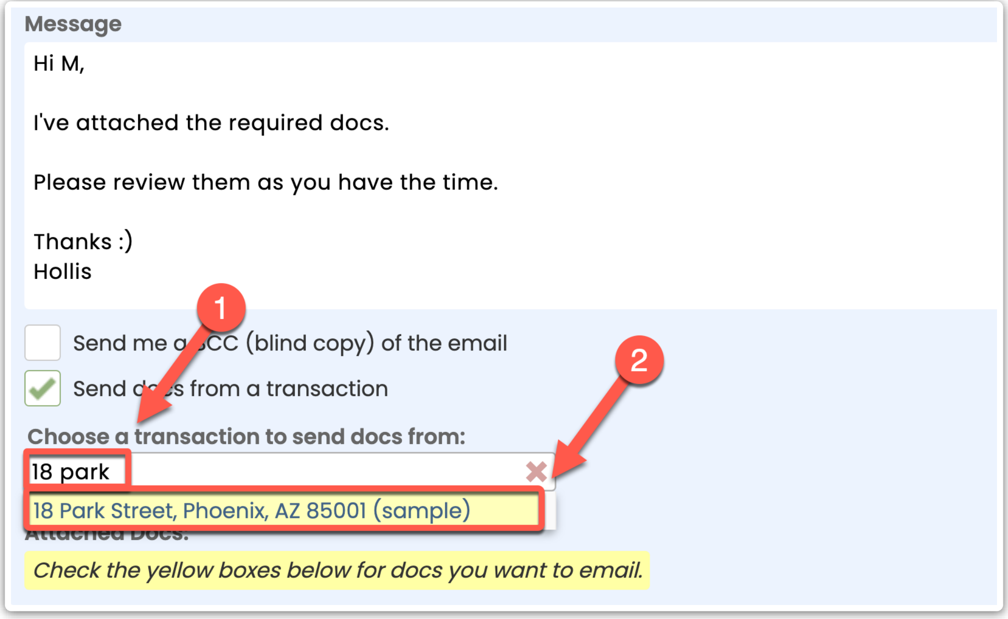
5 Optionally, BCC yourself on the message by checking the option next to [Send me a BCC (blind copy) of the email].



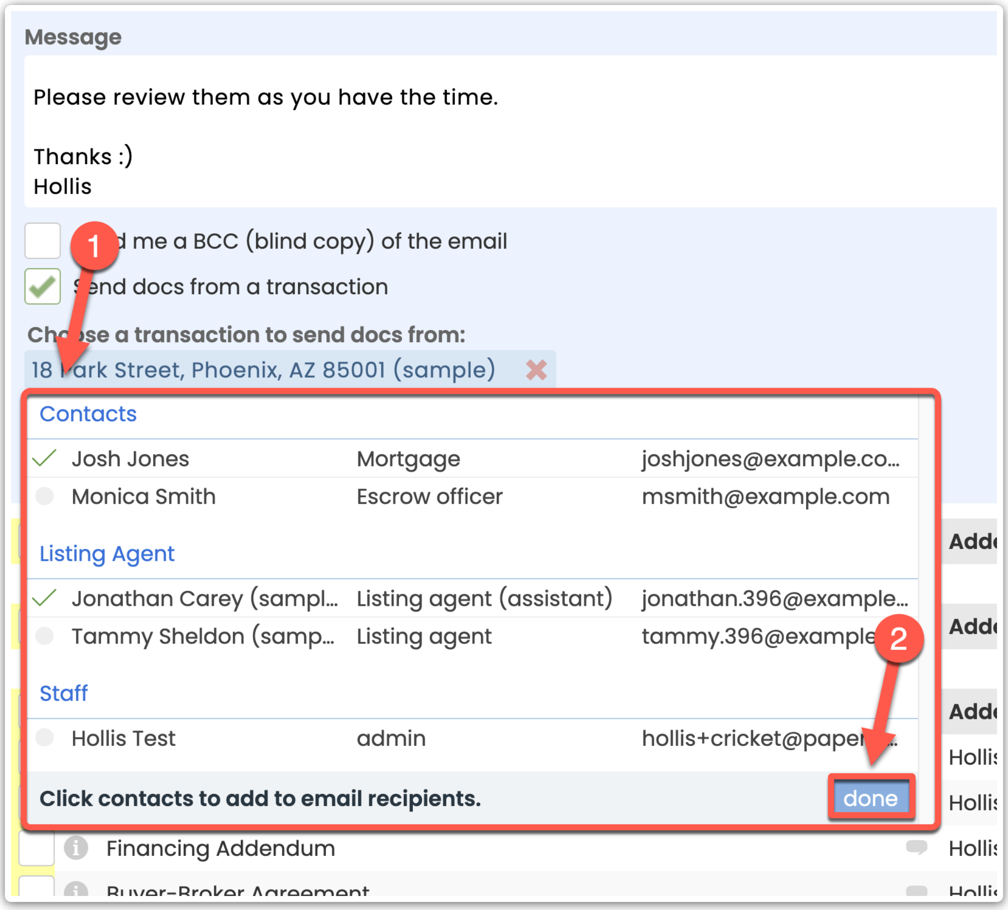
6 **Check the box next to [Send docs from a transaction].**



7 **In the area below, choose a transaction to send docs from**by typing the *Transaction Name*, then selecting the transaction once it appears in the list.

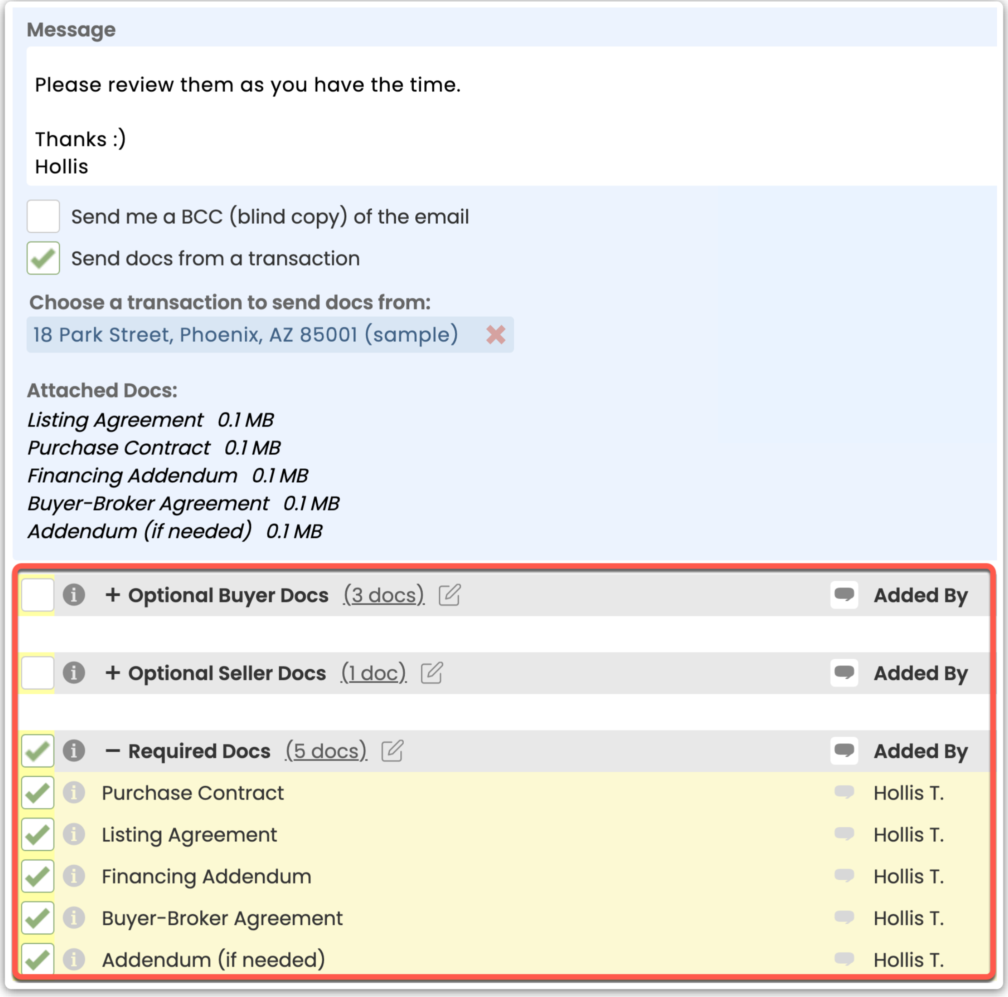


8 **Add recipients from the transaction** by choosing any *Contacts*, *Agents*, or *Staff* to include as recipients, then click [Done].

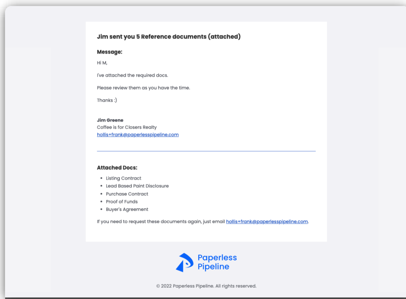


9 **Attach *Reference* docs or links to the message** by checking the boxes to the left of your

desired docs and links.



10 **Click [Send Email].** The message and attached *Reference* docs and links will be sent to your included recipients.



Example of an email sent from *Reference*

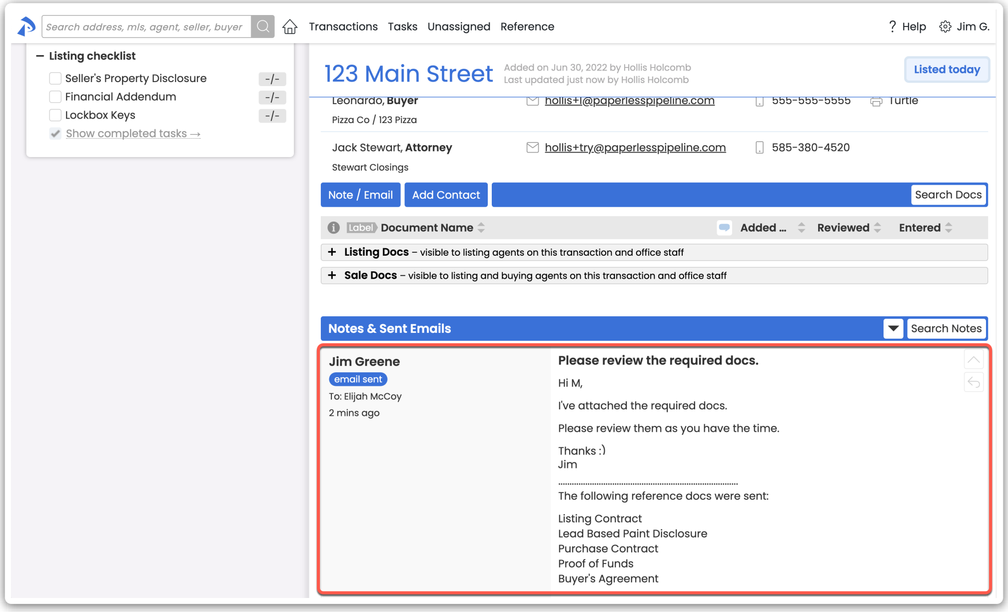
View the Sent Reference Email on a Transaction

View an email that was sent from the *Reference* page and associated with a transaction.

Who Can Do This? Agents and admins.

To view a sent *Reference* email that was associated with a transaction:

1. **Go to a transaction you associated with an email you sent from the *Reference* page.**
2. **Scroll down to the *Notes & Sent Emails* section.**
3. **View the sent *Reference Email*** including a list of the attached *Reference* docs or links.



View the Transaction History Record

View the *Transaction History* record of an email sent from the *Reference* page that was associated with a transaction.

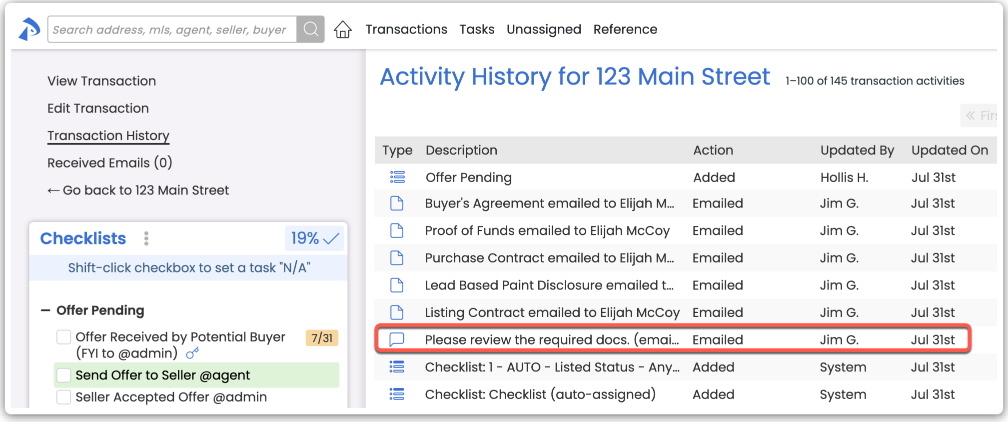
Who Can Do This? Agents and admins.

To view the *Transaction History* record of an email sent from *Reference* and associated with a transaction:

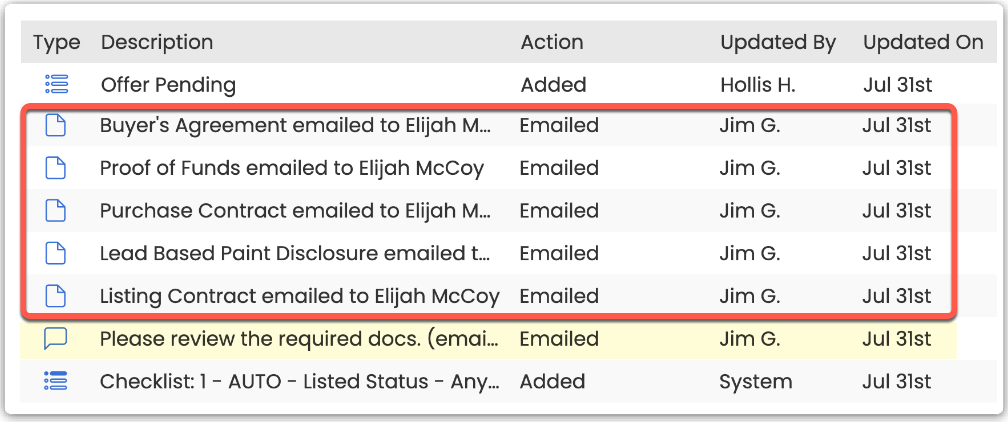
1. **Go to a transaction you associated with an email you sent from the *Reference* page.**

2 **Click [Transaction History] from the left menu**

3 **View the sent email record** by finding the *Subject* of the sent *Reference Email* in the *Description* column.



4 **View the record of each emailed doc or link** above the record for the sent email.



5 **View the time the *Reference* emails, docs, or links were sent** by hovering over the *Updated On* date of the records.