

# 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*.

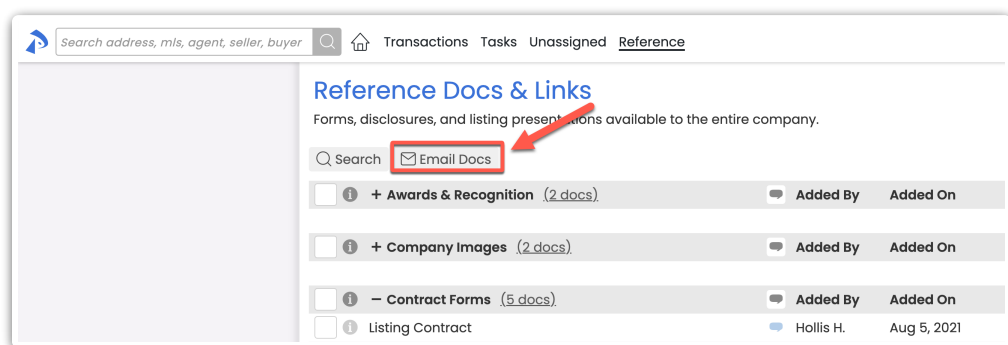
## Send Reference Docs & Links from a Transaction

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.

### Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

Search Email Docs

Email Addresses  
 Enter email address

Subject  
 Please review the required docs.

Message  
 Type your email message here

Send me a BCC (blind copy) of the email  
 Send these docs from a transaction

Cancel Send Email

Attached Docs:  
 Check the yellow boxes below for docs you want to email.

	Added By	Added On
<input type="checkbox"/> + Awards & Recognition (2 docs)		
<input type="checkbox"/> + Company Images (2 docs)		
<input type="checkbox"/> - Contract Forms (5 docs)		
<input type="checkbox"/> Listing Contract	Hollis H.	Aug 5, 2021

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

### Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

Search Email Docs

Email Addresses  
 Enter email address

Subject  
 Please review the required docs.

Message  
 Hi M,  
 I've attached the required docs.  
 Please review them as you have the time.  
 Thanks :)  
 Hollis

Send me a BCC (blind copy) of the email  
 Send these docs from a transaction

Cancel Send Email

Attached Docs:  
 Check the yellow boxes below for docs you want to email.

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

**Message**

Hi M,

I've attached the required docs.

Please review them as you have the time.

Thanks :)  
Hollis

Send me a BCC (blind copy) of the email  
 Send these docs from a transaction

**Attached Docs:**  
*Check the yellow boxes below for docs you want to email.*

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

**Message**

Hi M,

I've attached the required docs.

Please review them as you have the time.

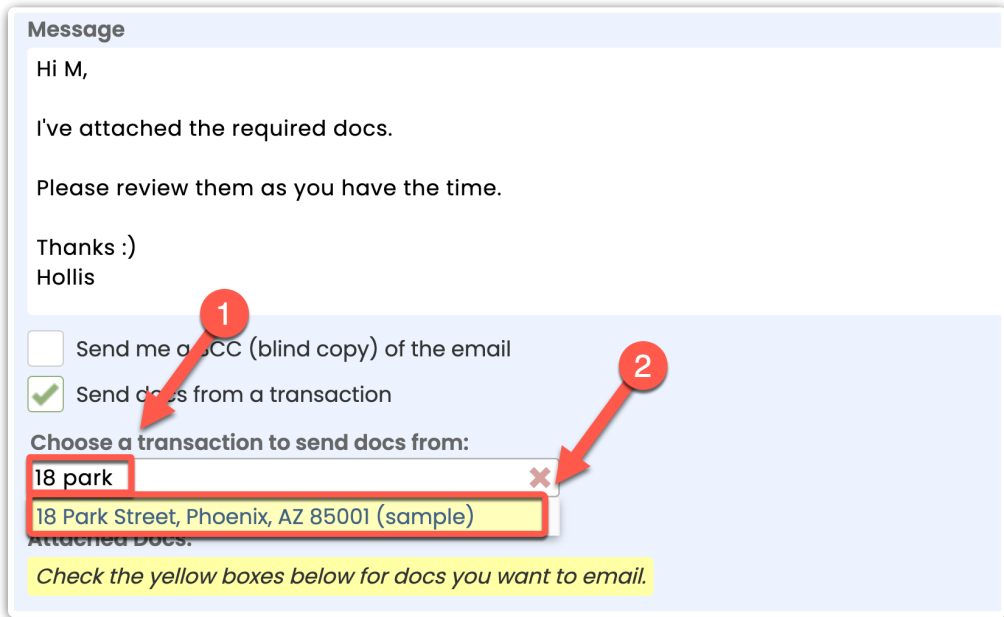
Thanks :)  
Hollis

Send me a BCC (blind copy) of the email  
 Send these docs from a transaction

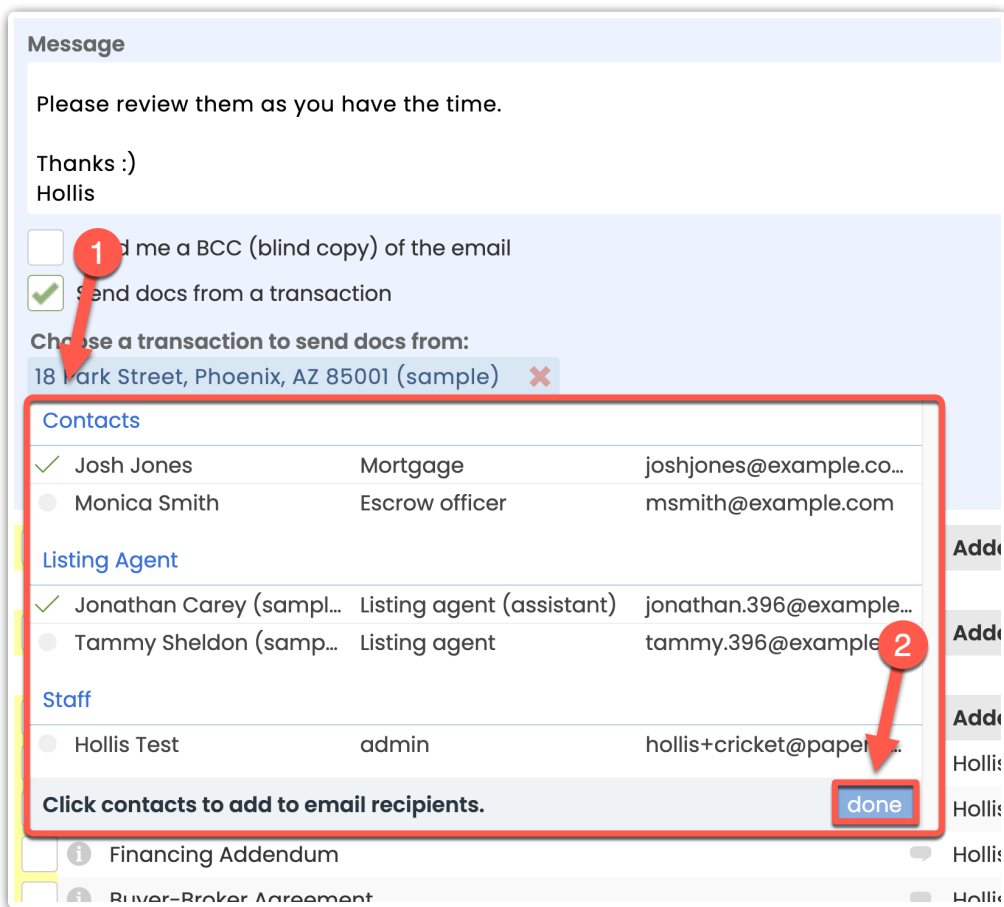
**Choose a transaction to send docs from:**

**Attached Docs:**  
*Check the yellow boxes below for docs you want to email.*

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.

**Message**

Please review them as you have the time.

Thanks :)  
Hollis

Send me a BCC (blind copy) of the email

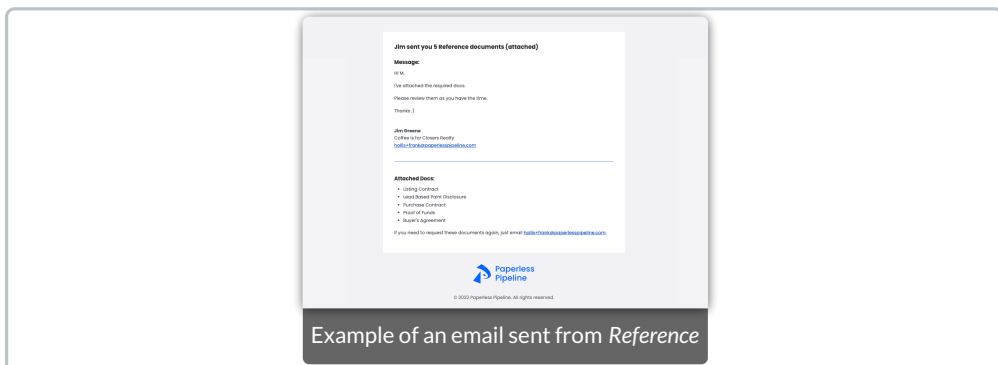
Send docs from a transaction

**Choose a transaction to send docs from:**  
18 Park Street, Phoenix, AZ 85001 (sample) ✕

**Attached Docs:**  
*Listing Agreement 0.1 MB*  
*Purchase Contract 0.1 MB*  
*Financing Addendum 0.1 MB*  
*Buyer-Broker Agreement 0.1 MB*  
*Addendum (if needed) 0.1 MB*

<input type="checkbox"/>	<b>+ Optional Buyer Docs</b> (3 docs)	Added By
<input type="checkbox"/>	<b>+ Optional Seller Docs</b> (1 doc)	Added By
<input checked="" type="checkbox"/>	<b>- Required Docs</b> (5 docs)	Added By
<input checked="" type="checkbox"/>	Purchase Contract	Hollis T.
<input checked="" type="checkbox"/>	Listing Agreement	Hollis T.
<input checked="" type="checkbox"/>	Financing Addendum	Hollis T.
<input checked="" type="checkbox"/>	Buyer-Broker Agreement	Hollis T.
<input checked="" type="checkbox"/>	Addendum (if needed)	Hollis T.

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



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.

The screenshot shows a software interface for managing real estate transactions. At the top, there are navigation tabs for 'Transactions', 'Tasks', 'Unassigned', and 'Reference'. The main content area displays details for a transaction titled '123 Main Street', including the address, listing agent 'Leonardo, Buyer', and attorney 'Jack Stewart, Attorney'. Below this, there is a section for 'Notes & Sent Emails'. A specific email is highlighted with a red border, showing it was sent by 'Jim Greene' to 'Elijah McCoy' 2 minutes ago. The email body contains the text: 'Please review the required docs. Hi M, I've attached the required docs. Please review them as you have the time. Thanks :) Jim'. Below the text, it lists the following reference documents: Listing Contract, Lead Based Paint Disclosure, Purchase Contract, Proof of Funds, and Buyer's Agreement.

## 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.

Activity History for 123 Main Street 1-100 of 145 transaction activities

Type	Description	Action	Updated By	Updated On
☰	Offer Pending	Added	Hollis H.	Jul 31st
📄	Buyer's Agreement emailed to Elijah M...	Emailed	Jim G.	Jul 31st
📄	Proof of Funds emailed to Elijah McCoy	Emailed	Jim G.	Jul 31st
📄	Purchase Contract emailed to Elijah M...	Emailed	Jim G.	Jul 31st
📄	Lead Based Paint Disclosure emailed t...	Emailed	Jim G.	Jul 31st
📄	Listing Contract emailed to Elijah McCoy	Emailed	Jim G.	Jul 31st
📄	Please review the required docs. (email...	Emailed	Jim G.	Jul 31st
☰	Checklist: 1 - AUTO - Listed Status - Any...	Added	System	Jul 31st
☰	Checklist: Checklist (auto-assigned)	Added	System	Jul 31st

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

Type	Description	Action	Updated By	Updated On
☰	Offer Pending	Added	Hollis H.	Jul 31st
📄	Buyer's Agreement emailed to Elijah M...	Emailed	Jim G.	Jul 31st
📄	Proof of Funds emailed to Elijah McCoy	Emailed	Jim G.	Jul 31st
📄	Purchase Contract emailed to Elijah M...	Emailed	Jim G.	Jul 31st
📄	Lead Based Paint Disclosure emailed t...	Emailed	Jim G.	Jul 31st
📄	Listing Contract emailed to Elijah McCoy	Emailed	Jim G.	Jul 31st
🗨️	Please review the required docs. (email...	Emailed	Jim G.	Jul 31st
☰	Checklist: 1 - AUTO - Listed Status - Any...	Added	System	Jul 31st

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

📄	Buyer's Agreement emailed to Elijah M...	Emailed	Jim G.	Jul 31st
📄	Proof of Funds emailed to Elijah McCoy	Emailed	Jim G.	Jul 31st
📄	Purchase Contract emailed to Elijah M...	Emailed	Jim G.	Jul 31st
📄	Lead Based Paint Disclosure emailed t... ➔	Emailed	Jim G.	Jul 31st
📄	Listing Contract emailed to Elijah McCoy	Emailed	Jim G.	Jul 31st
🗨️	Please review the required docs. (email...	Emailed	Jim G.	Jul 31st