

Drag and Drop Doc Comments to Notes

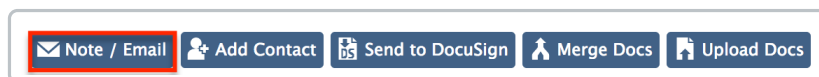
SUMMARY

Learn how to instantly copy your doc comments into a note or email by dragging them into the message area.

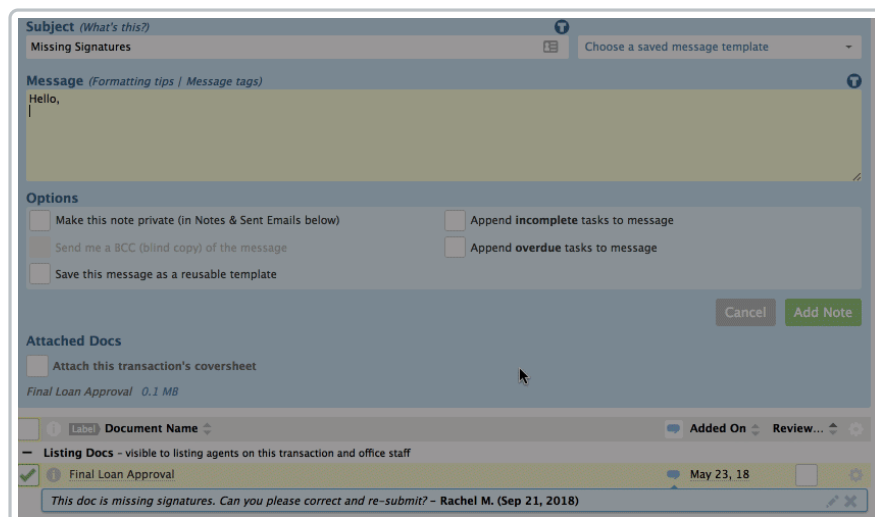
Drag and Drop a Comment to Notes

To drag and drop a document comment into the note or email of a transaction:

- 1 Go to the transaction and click [Note / Email] just above the list of documents.



- 2 Compose your message or select a saved template.
- 3 Locate the desired comment and drag and drop it into the Message field. The comment, commenter, date, and time will appear as normal text in the Message field.



- 4 Review and revise the message if needed.

Message *(Formatting tips...)*

This doc is missing signatures. Please sign and resubmit.
- Rachel M. (Jul 17, 2018)

Options

- ☐ Make this note private (in Notes & Sent Emails below)
- ☐ Send me a BCC (blind copy) of the message
- ☐ Save this message as a reusable template

Attached Docs

- ☒ Attach this transaction's coversheet

Cancel Add Note

5 Complete any other options before adding the note or sending the message.

6 Click [Add Note].

Learn more about [Managing Comments on Docs](#) →

Learn more about [Dragging and Dropping Contacts into Notes](#) →

Learn how to [Create and Manage Reusable Note and Email Templates](#) →