

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*.

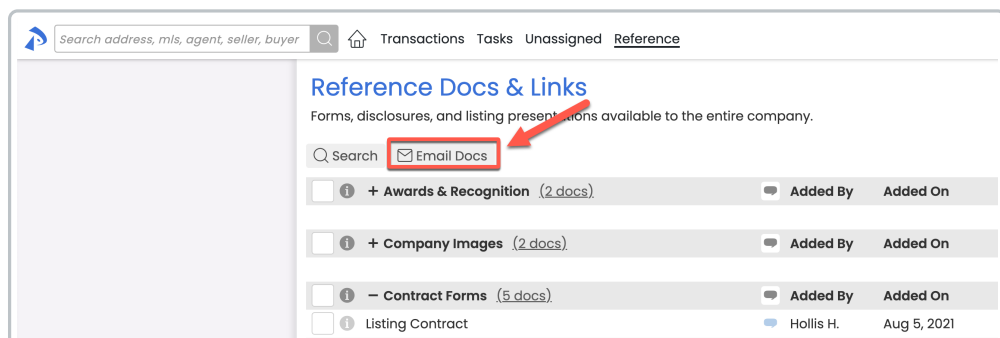
Send Reference Docs & Links from a Transaction

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 Your Reference Library**
 - Click [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

jam@paperlesspipeline.com 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
☐ + Awards & Recognition (2 docs)		
☐ + Company Images (2 docs)		
☐ - Contract Forms (5 docs)		
☐ 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

jam@paperlesspipeline.com 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.

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 docs from a transaction

Choose a transaction to send docs from:

18 park

18 Park Street, Phoenix, AZ 85001 (sample)

Attached Docs:

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

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

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)

Contacts

☒	Josh Jones	Mortgage	joshjones@example.co...
☐	Monica Smith	Escrow officer	msmith@example.com

Listing Agent

☒	Jonathan Carey (saml...	Listing agent (assistant)	jonathan.396@example...
☐	Tammy Sheldon (samp...	Listing agent	tammy.396@example...

Staff

☐	Hollis Test	admin	hollis+cricket@paper...
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Click contacts to add to email recipients.

done

Financing Addendum

Buyer-Broker Agreement

- 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

☐ ⓘ + Optional Buyer Docs (3 docs) ✎

Added By

☐ ⓘ + Optional Seller Docs (1 doc) ✎

Added By

☒ ⓘ - Required Docs (5 docs) ✎

Added By

☒ ⓘ Purchase Contract

Hollis T.

☒ ⓘ Listing Agreement

Hollis T.

☒ ⓘ Financing Addendum

Hollis T.

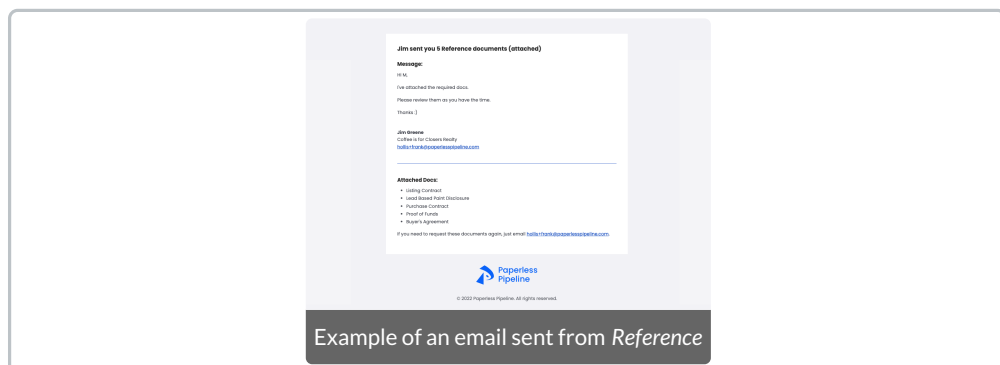
☒ ⓘ Buyer-Broker Agreement

Hollis T.

☒ ⓘ Addendum (if needed)

Hollis T.

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



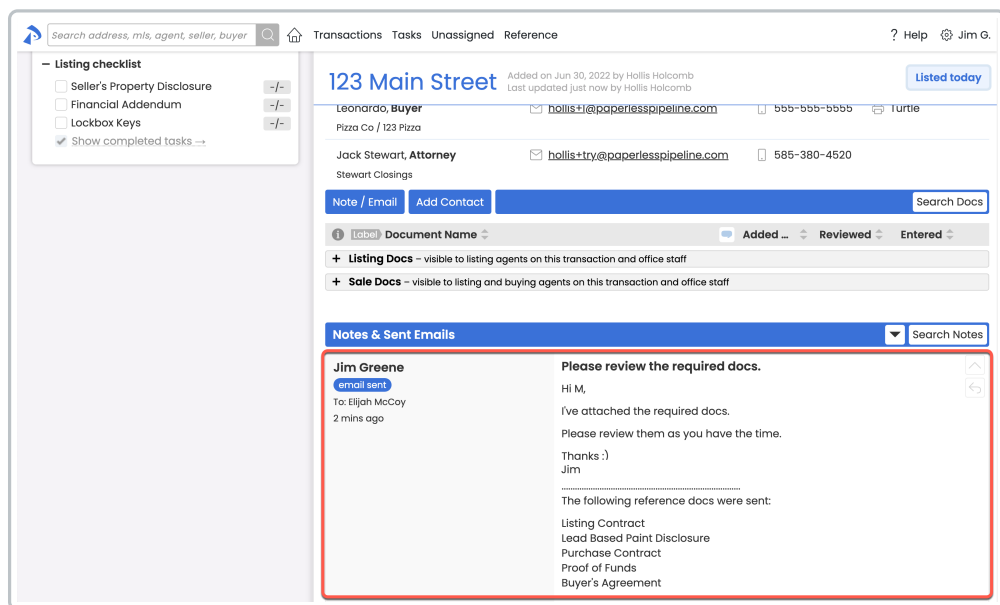
View the Sent Reference Email on a Transaction

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.



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.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Reference

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 to @admin)		Emailed	Jim G.	Jul 31st
Checklist: 1 - AUTO - Listed Status - Any...		Added	System	Jul 31st
Checklist: Checklist (auto-assigned)		Added	System	Jul 31st

Checklists 19% ✓

Shift-click checkbox to set a task "N/A"

Offer Pending

- ☐ Offer Received by Potential Buyer (FYI to @admin) 7/31
- ☒ Send Offer to Seller @agent
- ☐ Seller Accepted Offer @admin

- 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 to @admin)		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 to @admin)	Emailed	Jim G.	Jul 31st