

Track Received Email Messages and Attachments on Transactions

SUMMARY

Short Version: 1) Open a transaction. 2) Click "Received Emails" from the left menu. 3) Click any email to view its details.

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View Emails Sent to a Transaction

- 1 From any transaction, click [Received Emails] from the left menu. Here you'll see a list of emails sent to the transaction, including references to any attachments.
- 2 Click anywhere on an email to expand it and see the full body of the email.

Sender	Email Address	Subject	Date	Attached
Hollis H.	hollis@paperlesspipeline.com	Fwd: Product Order Form - test	Mar 9, 18	

No attachments

Sender: Hollis Holcomb
Sent from: hollis@paperlesspipeline.com
Subject: Fwd: Product Order Form - test
Received on: March 9, 2018 at 1:33 p.m. ET

Open or View an Email's Attachment

- 1 Return to the transaction and view the docs listed there. The doc may have been renamed during the assignment process. You can see the original name of the doc by hovering over the icon to the left of the doc.

 buyer info sheet

Filename: buyer_info_sheet.pdf
Pages: 1
Size: 268.1 KB
Uploaded by: Carol Francis on Apr 9, 2018 at 5:01 p.m. ET



Docs may still be in Unassigned docs if it has not yet been assigned to the transaction.

Emails Sent to Transactions

Emails sent to transactions are only able to be seen by admins or the agent that sent the email. This means that agents are only able to see their own emails, allowing agents and admins to send ALL communications to the transaction (including confidential ones) without risk of agents who should not have access being able to view them.
