

Email a CDA to Title / Escrow / Attorney

SUMMARY

Quickly email a commission disbursement authorization from any transaction.

Email a Commission Disbursement Authorization

- 1 From inside the transaction, click [Note/Email].
- 2 Enter the contact's email address. If the person handling the closing / escrow / title / or attorney is listed as a contact, drag and drop their email address into the 'send to an external email address' field.
- 3 Fill out the subject and body of the email. If using message templates, apply a saved template which will auto-populate the subject as well as the message text. If not using message templates, enter the subject line and type out the message.
- 4 Scroll down to the docs section and select the commission disbursement authorization.
- 5 Click [Send Email]. The commission disbursement authorization is on its way.

The screenshot shows a web form for sending a Commission Disbursement Authorization (CDA) via email. The form is divided into several sections:

- Subject:** A text field containing "Commission disbursement authorization" and a dropdown menu set to "CDA".
- Message:** A text area containing the message: "Attached is the commission disbursement authorization. Please confirm that you have received. Thanks, -Ramu".
- Options:** A section with three checkboxes:
 - ☐ 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:** A section with a checkbox labeled "Attach this transaction's coversheet (contacts page will not be included)". Below it, the text "Commission Disbursement Authorization 0.1 MB" is displayed.
- Buttons:** "Cancel" and "Send Email" buttons are located at the bottom right of the form.
- Footer:** A table-like structure at the bottom shows a list of documents. The first row is "Financial Docs - visible to backoffice admins". The second row, which is highlighted in yellow, is "Commission Disbursement Authorization" with a date of "Apr 17, 18" and a status icon.