Transaction Notes

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Leave a note on a transaction to document a detail or keep the team on the same page.

Introduction

Half of what matters on a deal never makes it into a field. A call you made, or a heads-up for whoever picks the file up next, usually ends up in somebody's inbox or in somebody's head.

A note puts it on the deal instead. It's an internal record you attach to a transaction, kept alongside the emails sent from that transaction, so the written history of a file sits in one place rather than scattered across separate accounts. That's what makes it worth more than a text message or a sticky note: the context doesn't belong to you, it belongs to the deal. When an agent hands a file over, or a coordinator comes back to it months later, what was said about the transaction is still on the transaction.

There's one thing a note isn't: it's a record rather than a message, so people meet it when they open the transaction instead of being pinged about it. Write it for whoever opens the file next, and they get the context without having to track you down.

How It Works

Notes are part of a transaction's built-in messaging, kept in one place and visible according to each person's role.

The Notes & Sent Emails Section

Open a transaction and you'll find the Notes & Sent Emails section, which lists the notes added and the emails sent from that transaction, newest activity together. It's a simple, documented history of what's been said about the deal.

Who Can Add and See Notes

Agents on the transaction and admins can add notes. As with the rest of the transaction, each person sees the information their role gives them access to. See Transaction Details.

Notes vs. Emails

A note is an internal record kept on the transaction; an email is a message actually sent to someone from the transaction. Both are logged together in the Notes & Sent Emails section so nothing gets lost.

Add a Note to a Transaction

> Add a note from the open transaction to keep a record on the deal.

> **Who Can Do This**: Agents added to the transaction, and admins.

To add a note to a transaction:

1. Open the transaction.
2. Go to the Notes & Sent Emails section.
3. Enter your note.
4. Save it to add it to the transaction's record.

Your note appears in the Notes & Sent Emails section, timestamped and attached to the transaction.

When It Can't Wait to Be Found

A note waits to be read. When what you're writing has a date attached — a document you need back, a deadline somebody has to act on — waiting for them to open the file isn't good enough.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email