

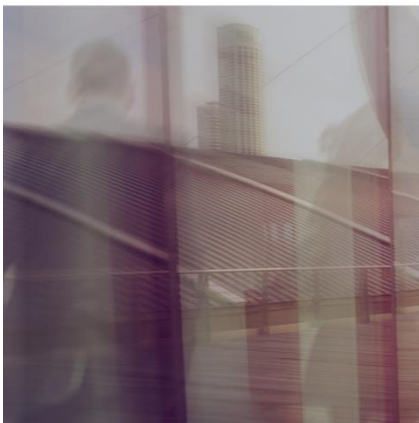
TransactionDESK®

Using Email Upload into your Transaction






LONE WOLF
TECHNOLOGIES

lwolf.com
1.866.CRY.WOLF(279.9653)



Using Email Upload into your Transaction

This guide will cover on how to use the email upload feature to send emails with PDF attachments directly into your Transaction.

1. Select the  icon from the menu at the left.
2. Select the Transaction.
3. At the top right of the screen, select the  icon.
4. The window will display the TransactionDesk email address for the transaction. Selecting “Open in Email Client” opens a screen that allows you configure your personal email account to use with the system and opens an email window that is pre-populated with or allows you to select the contact .
5. Select the  icon at the upper right of the transaction to save the Transaction email address directly to your mail program.

Use this unique email address to send PDF's to the Transaction. A document will be created for the email itself and add PDF's attached to the Documents section of the Transaction.