

Transaction Desk Tip#2 – Can I still do a paper contract?


Question I'm hearing a lot - Can I still do a paper contract?

Yes, absolutely you can still do a paper contract when needed. However, we will ask that when you are ready to submit that contract you convert it to a digital format. It's very easy - you can fax it into the system, email it into the system, or scan it and upload it from a computer. The instructions on how to do that are in the training handout (screenshot below). Or if you need extra help, just let me know. Any staff person will be able to help you as well.

Uploading Documents


Submitting my document via fax

Fax documents directly into your transaction is through "fax back" cover sheets.

- Select the  next to the fax back cover sheet and hit download.
- Put this as the first page of your fax and the documents will come directly into the transaction.

Submitting documents via email

Every one of your transaction files has a unique email. Documents emailed to your transaction will be uploaded to the documents folder.

- In your transaction, select the .
- Copy and paste the email into your contacts.
- When emailed documents, regarding your transaction, forward the emails into the transaction.

Don't forget that you can scan to email from our copiers - email to yourself, then go into your email and forward to your transaction.