

Emailing Outside/Co-op Agents

SUMMARY

If your transaction has an outside co-op agent, you can now record their email address and easily send notes to them.

IN THIS ARTICLE

[Add a Co-op / Outside Agent](#)

[Email an Outside Agent](#)

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Add a Co-op / Outside Agent

- 1 Edit the transaction and check [this transaction has outside (co-op) agents].
- 2 Some fields will appear below. Enter the name and email address of the outside listing or selling agent and save.

☒ This transaction has outside (co-op) agents

Outside Listing Agent

Name / Info:

Email:

Outside Selling Agent

Name / Info:

Email:

Email an Outside Agent

- 1 Go to the transaction and click [Email / Notes].
- 2 Drag the agent to the *External Recipients* field.

3

Listing Agents

Agent Blue

holлис+agentblue@paperlesspipeline.com

Jason DeMarco (outside)

JDeMarco@outsideagent.com

+ 2 Contacts

Note / Email

Add Contact

Send to DocuSign

Merge Docs

Upload Docs

Search Docs

Email this message to:

☐ Listing agents

☐ Agent Blue

Staff (13)

☐ Admin Test

☐ Colonel Mustard

☐ Hollis Holcomb

☐ Kristian Keane

☐ Mister Admin

☐ Rachel McWhirter

☐ Test Admin

☐ Carol Francis

☐ Ginger Grant

☐ Jane Smith

☐ Kristian Keane 2.0

☐ Monta Fleming

☐ Ramu Tremblay

Send to an external email address (What's this?)

Enter email addresses

Subject (What's this?)

Enter subject

Choose a saved message template

Message (Formatting tips | Message tags)

Type your message here

4

Compose your message

5

Click [Send].

Learn more about [Dragging and Dropping Comments to Notes](#) →