

Manage Contacts

Learn how *Contacts* work in Paperless Pipeline, including adding them to transactions, managing them, downloading them and more.

Introduction

What are Contacts?

Contacts are people outside your Pipeline account involved in a transaction, such as cooperating agents, escrow officers, attorneys, and sellers.

Contacts are an essential component of any transaction, allowing you to keep track of important information about the people or organizations you work with on transactions.


How They Work

Agents and admins can easily add *Contacts* to transactions, making them visible to anyone who can view the transaction.

When outside *Contacts* are added to transactions, it is easy to identify them, send them messages, share their information with others, and (for offices subscribed to Commission Module) reference them when managing commissions.

Any *Contacts* added can be quickly added again on future transactions by typing just a few characters and then selecting one of the suggested previously used *Contacts*.

A master admin can globally manage *Contacts* to update an incorrect variation of a *Contact's* details for all transactions it is associated with. They may also hide (remove) it entirely from the list of suggestions when adding *Contacts* to transactions.

 *Contacts* do not have access to your Pipeline account and are stored on transactions for your office's reference only.

How To

View Transaction Contacts

Learn how to view *Contacts* on transactions.

Who Can Do This? Anyone with access to view a transaction.

To view *Contacts* on a transaction:

- 1 Go to a transaction.
- 2 View any contacts added to a transaction in the *Contacts* area.

The screenshot shows the Paperless Pipeline interface for transaction '813 Briarcliff'. The left sidebar contains a 'Checklists' section with a 'Listing checklist (Residential)' and a progress indicator of 67%. The main content area displays transaction details, including 'General' information (Status: Listed, MLS #: 04270247, Listed On: Apr 1, 2020, Accepted On: Apr 8, 2020, Closed On: May 31, 2020), 'Seller & Buyer' information (Buyer: test), 'Sale & Commission' information (Sale Price: \$500,000, Total Commission: \$200,000), and 'Listing Agents' (Kristian Keane, Carlisle Lilly). The 'Buying Agents' section lists Kristian Agent and Rosemary Laucala. The 'Contacts' section is highlighted with a red box and contains the following entries:

Name	Role	Contact Info
Monta Cupcake	Referrer	monta+cupcake@paperlesspipeline.com, 2225552222
Odysseus Davis	Property Inspector	hollis+odie@paperlesspipeline.com, (237) 912-2639
Jack Nicklaus	Attorney	hollis+trv@ohholcomb.com, (588) 931-5135, (744) 736-7304
Susan Smyrna	Escrow	monta+test@paperlesspipeline.com, (700) 859-2537, (862) 718-8522
April O'Neil	Seller	hollis+apriloneil@paperlesspipeline.com, (860) 249-7821

Below the contacts list are buttons for 'Note / Email', 'Add Contact', 'Merge Docs', and 'Upload Docs'. A red arrow points from the 'Checklists' sidebar to the 'Contacts' section.

Click [] to show the *Contacts* section or [] to hide it. Pipeline will remember your preference whenever you return to any transaction later.

This screenshot shows the same transaction page as above, but with the 'Contacts' section expanded. A red arrow points to the '+ 5 Contacts' header. The 'Buying Agents' section is visible above the 'Contacts' section, listing Kristian Agent and Rosemary Laucala. The 'Contacts' section is now visible below the buying agents, showing the same list of contacts as in the previous screenshot.

Sort Your View of Transaction Contacts

Learn how to sort *Contacts* on a transaction.

Who Can Do This? Anyone with access to view a transaction.

To sort *Contacts* on a transaction:

- 1 Go to a transaction.
- 2 Click [**↓ Order Added**] from the *Contacts* area.

813 Briarcliff Added on Apr 27, 2020 by Hollis Holcomb
Last updated just now by Hollis Holcomb

Kristian Agent carol+agent@paperlesspipeline.com 567-567-5678

Rosemary Laucala rosemarylaucala@paperlesspipeline.com 555-555-5555

– 5 Contacts ⊕ **↓ Order Added** + Add Contact

Monta Cupcake, **Referrer** monta+cupcake@paperlesspipeline.com 22255522
Cupcake Central
April is a regular at Cupcake Central. When they learned she wanted to move, they referred her to us!

Odysseus Davis, **Property Inspector** hollis+odie@paperlesspipeline.com (237) 912-2639
Odie's Property Inspection Company / 717 Main Street

Jack Nicklaus, **Attorney** hollis+try@ohholcomb.com (588) 931-5135 (744) 736-7304
Jack Nicklaus Closings / 312 Forty St

Susan Smyrna, **Escrow** monta+test@paperlesspipeline.com (700) 859-2537 (862) 718-8522
Escrow R Us / 729 Escrowia Lane

April O'Neil, **Seller** hollis+apriloneil@paperlesspipeline.com (860) 249-7821
813 Briarcliff
April is on vacation in New York until August 4. She will be easiest to reach via email.


Note / Email Add Contact Merge Docs Upload Docs Search Docs

Label Document Name Added On Reviewed

– Private Docs – visible to Hollis Holcomb (you) and office staff

Seller Financing Addendum Apr 27, 2020

- 3 Select your desired sort preference for displaying *Contacts*.

 Pipeline will remember your sort preference whenever you return to any transaction later.

Manage Contacts on a Transaction

Add a Contact

Learn how to add a *Contact* to a transaction.

Who Can Do This? Anyone with access to view a transaction.

To add a *Contact*:

- 1 Go to a transaction.
- 2 Click [+ Add Contact] above the *Docs* section.

The screenshot shows a transaction page for '813 Briarcliff'. At the top, it says 'Added on Apr 27, 2020 by Hollis Holcomb' and 'Last updated just now by Hollis Holcomb'. Below this is a list of contacts:

- Kristian Agent: carol+agent1@paperlesspipeline.com, 567-567-5678
- Rosemary Laucala: rosemarylaucala@paperlesspipeline.com, 555-555-5555
- Monta Cupcake, Referrer: monta+cupcake@paperlesspipeline.com, 2225552222
- Odysseus Davis, Property Inspector: hollis+odie@paperlesspipeline.com, (237) 912-2639
- Jack Nicklaus, Attorney: hollis+try@ohholcomb.com, (588) 931-5135, (744) 736-7304
- Susan Smyrna, Escrow: monta+test@paperlesspipeline.com, (700) 859-2537, (862) 718-8522
- April O'Neil, Seller: hollis+apriloneil@paperlesspipeline.com, (860) 249-7821

Below the contacts is a section for 'Private Docs' with a document titled 'Seller Financing Addendum' dated Apr 27, 2020. A red box highlights the '+ Add Contact' button in the top right corner of the contact list, and a red arrow points to it from the right. Another red arrow points to the contact entry for April O'Neil.

- 3 Enter details for the new *Contact*.
- 4 Click [Add Contact] to save the *Contact* to the transaction.

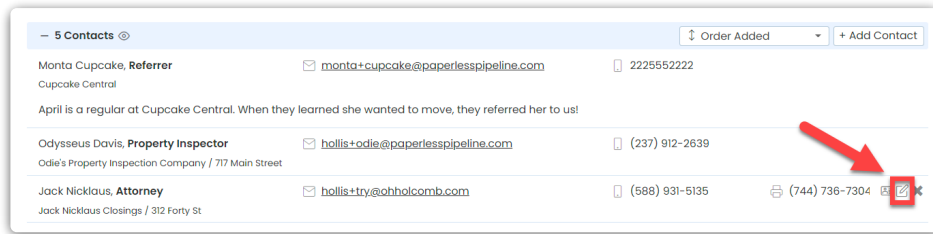
Edit a Contact

Learn how to edit a *Contact* on a transaction.

Who Can Do This? Anyone with access to view a transaction.

To edit an existing *Contact* on a transaction:

- 1 Go to a transaction.
- 2 Hover over the *Contact* then click [the edit icon].



- 3 Make your desired changes to the *Contact's* details.
- 4 Click [Save Contact] to save your changes to the *Contact*.

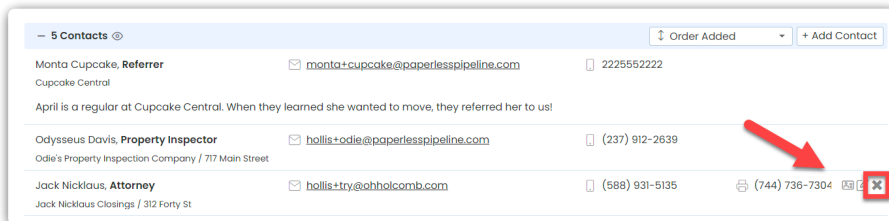
Delete a Contact

Learn how to delete a *Contact* on a transaction.

Who Can Do This? Anyone with access to view a transaction.

To delete a *Contact* on a transaction:

- 1 Go to a transaction.
- 2 Hover over the *Contact* then click [X].



- 3 Click [delete] to confirm the deletion.

Use Contacts on a Transaction

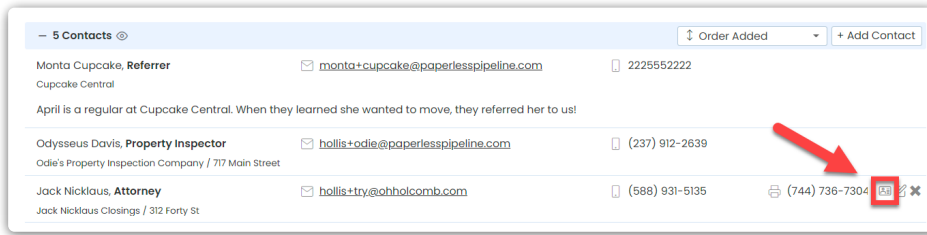
Download a Contact's vCard

Learn how to download a *Contact's* vCard.

Who Can Do This? Anyone with access to view a transaction.

To download a *Contact's* vCard:

- 1 Go to a transaction.
- 2 Hover over the contact then click the [vCard] icon. The *Contact's* vCard will be downloaded and saved to your device.



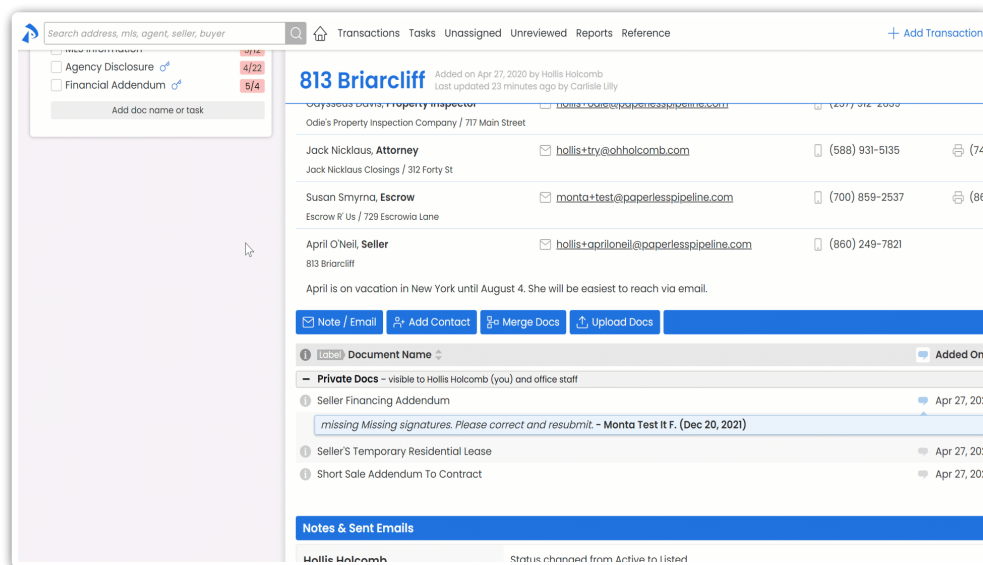
Email a Contact (Drag & Drop)

Learn how to email a *Contact* using drag and drop.

Who Can Do This? Anyone with access to view a transaction.

To send an email to a *Contact*:

- 1 When composing an email on a transaction, scroll up to the contact in the *Contacts* section.
- 2 Click and hold the *Contact's Name*, then drag it to the *Send To An External Email Address* field.



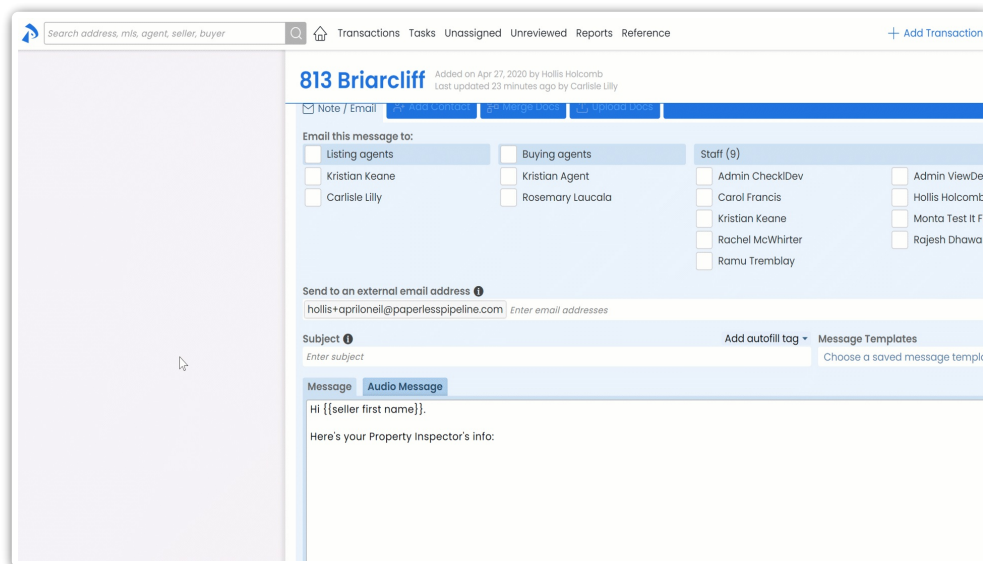
Share a Contact (Drag & Drop)

Learn how to share a *Contact's* details in messages using drag and drop.

Who Can Do This? Anyone with access to view a transaction.

To share a *Contact's* details:

- 1 When **composing an email on a transaction**, scroll up to the **contact in the Contacts** section.
- 2 Click and hold the **Contact's Name**, then drag it to the **Message** field. The *Contact* and its full details will be added to the message.



Manage Contacts Across All Transactions

A master admin can globally manage *Contacts* to update an incorrect variation of a *Contact's* details on all transactions where it exists. They may also hide (remove) it entirely from the list of suggestions that are displayed when *Contacts* are added to transactions.

Update A Contact Across All Transactions

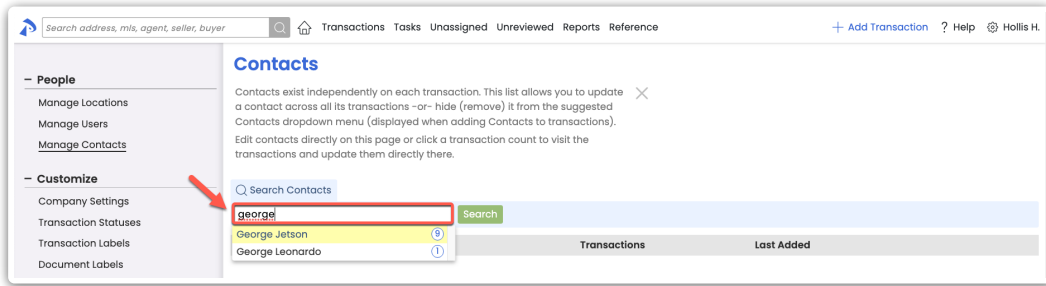
Learn how to make corrections to an incorrect variation of a *Contact's* details on all transactions where the *Contact* exists.

Who Can Do This? Master admins

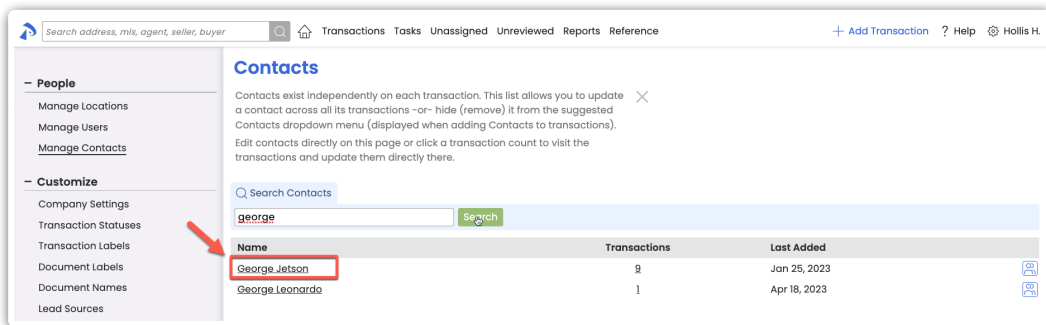
To update a specific *Contact* across all transactions:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Manage Contacts] from the left menu.

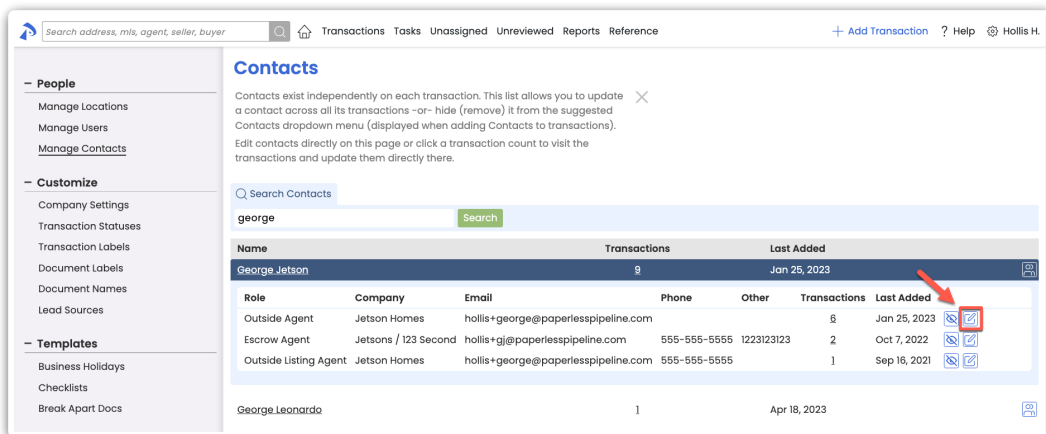
3 Search by the **Contact's Name** then select it from the resulting list or click [Search].



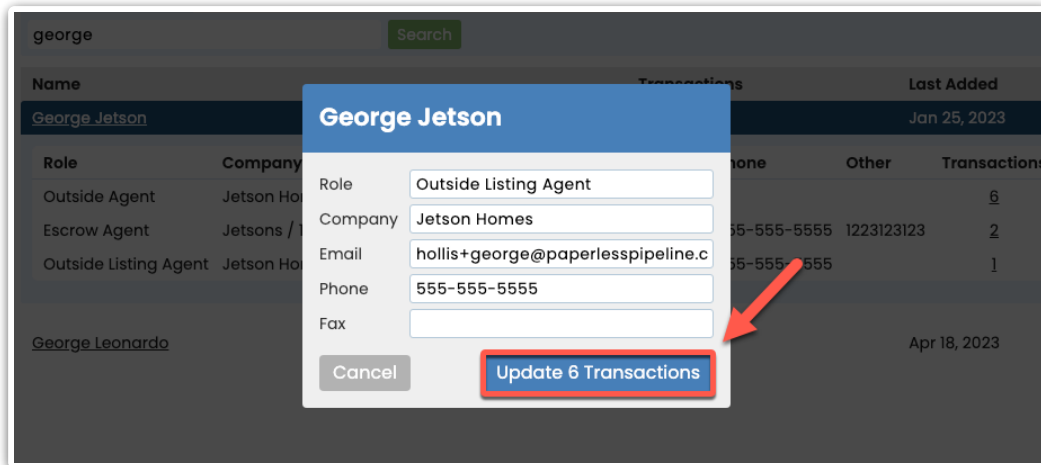
4 Click the name of the **Contact** you want to update from the list.



5 Click [the edit icon] next to the **Contact** you want to update.



6 Make your desired changes to the **Contact** then click [Update Transactions]. The **Contact** will be updated on all transactions.



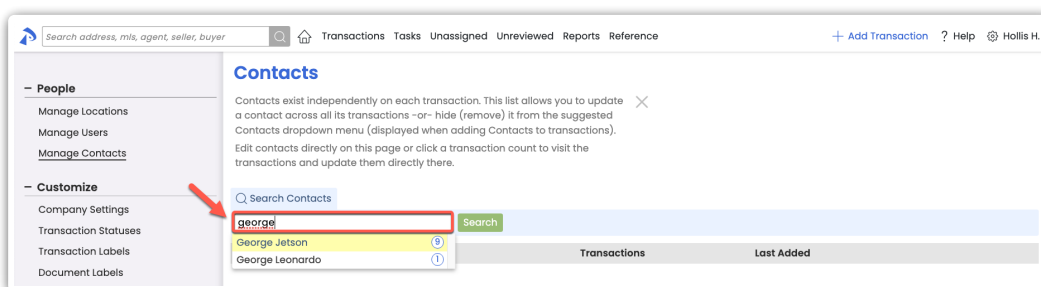
Hide a Contact from the Suggested Contacts Dropdown Menu

Learn how to hide a *Contact* if you don't want an obsolete or incorrect variation of a *Contact's* details to be suggested when *Contacts* are being added to transactions.

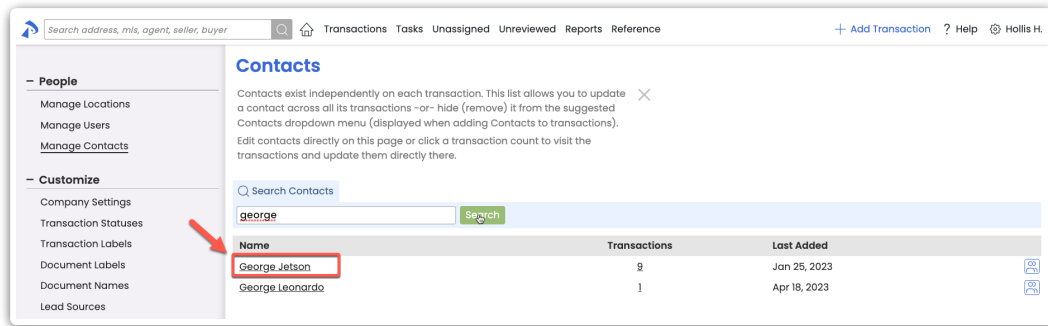
Who Can Do This? Master admins

To hide a *Contact* from the suggested list of *Contacts* on transactions:

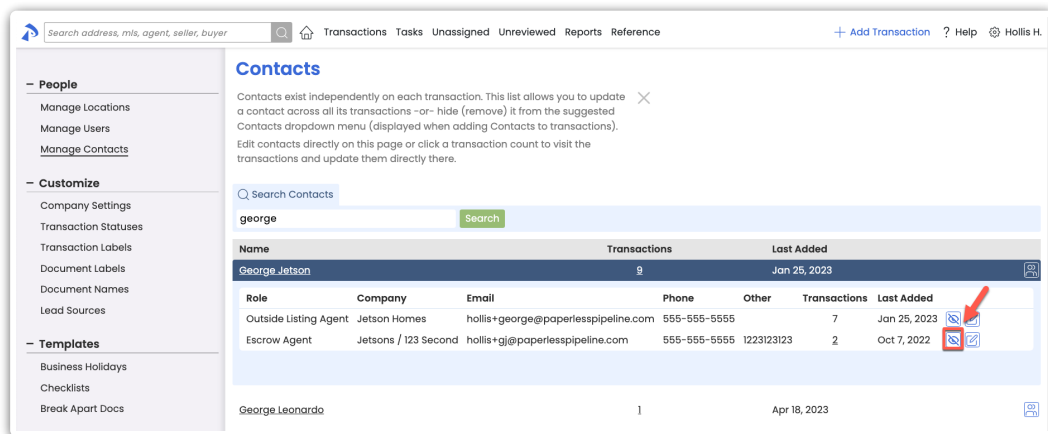
- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Manage Contacts] from the left menu.
- 3 Search by the *Contact's Name* then select it from the resulting list or click [Search].



- 4 Click the name of the *Contact* you want to hide from the list.



- 5 Click [the hide icon] next to the **Contact** you want to hide. The **Contact** will be hidden from suggestions when **Contacts** are being added to transactions.



Manage Contact Roles Across All Transactions

A master admin can globally manage the **Roles** of **Contacts** to update (or bulk update) an incorrect **Contact Role** for all **Contacts** it is associated with. They may also hide (remove) a **Role** entirely from the list of suggestions when adding **Contacts** to transactions.

Update A Role Across All Transactions

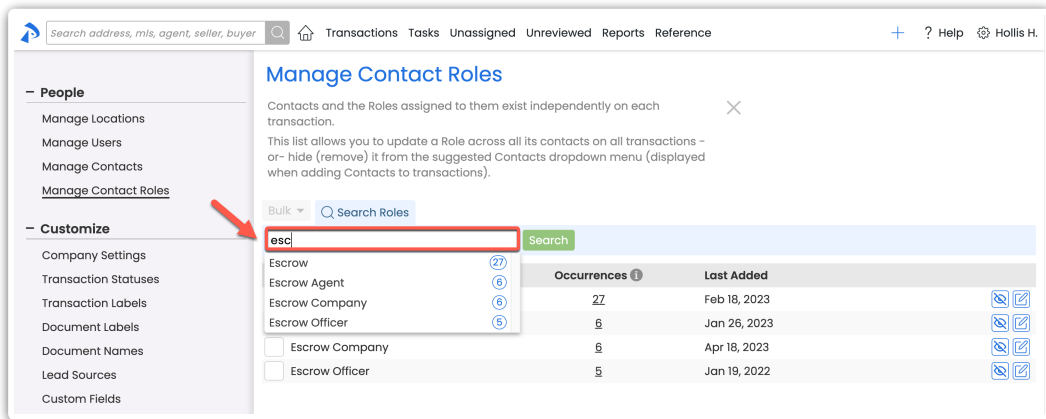
Learn how to make corrections to an incorrect variation of a **Contact Role** across all transactions where the **Contact Role** is used.

Who Can Do This? Master admins

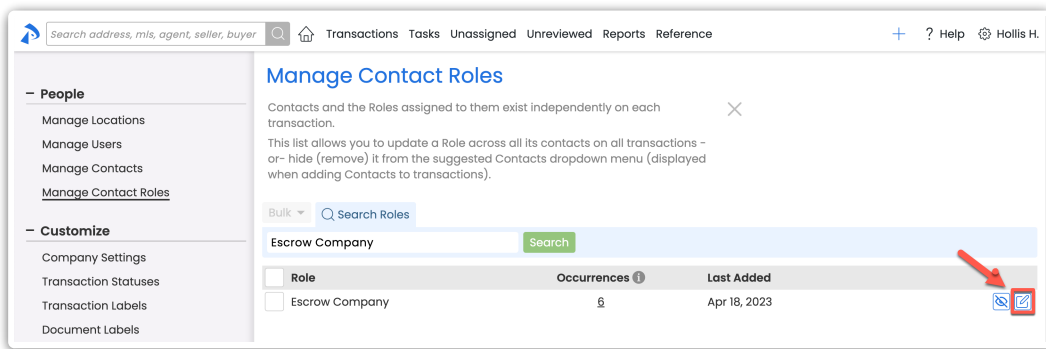
To update a specific **Contact Role**:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Manage Contact Roles] from the left menu.

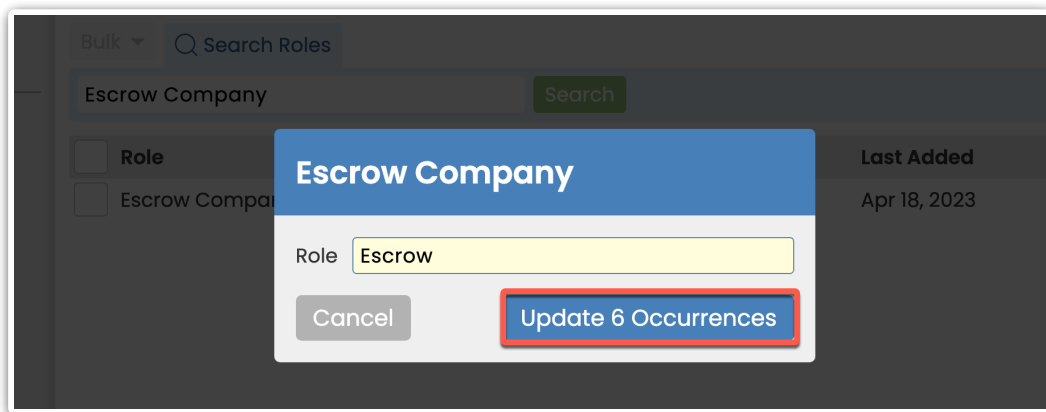
3 Search by Role then select it from the resulting list or click [Search].



4 Click [the edit icon] next to the Role you want to update.



5 Make your desired changes to the Role then click [Update Occurrences]. The Role will be updated for all occurrences.



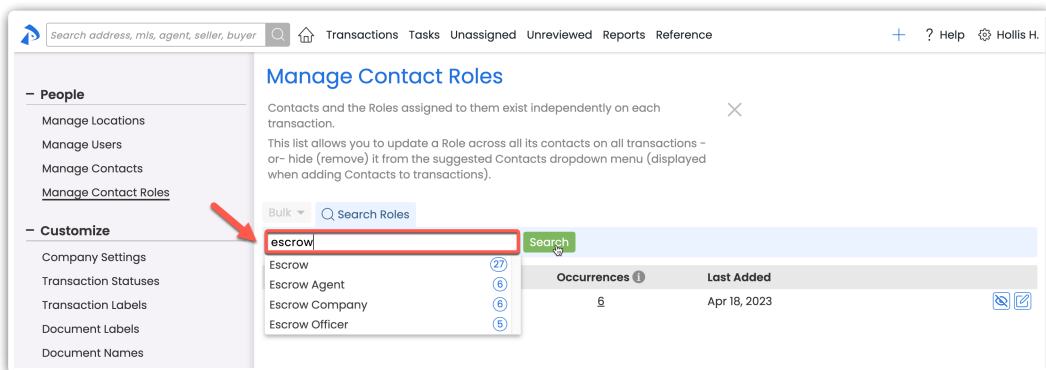
Bulk Update Similar Roles Across All Transactions (Consolidate Roles)

Learn how to bulk update similar Roles across all transactions to consolidate unneeded Role variations.

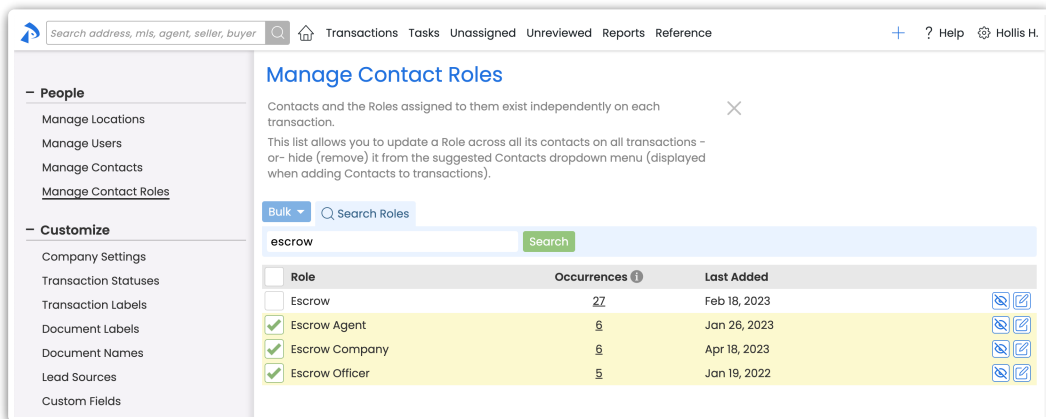
Who Can Do This? Master admins

To bulk update similar *Roles* across all transactions:

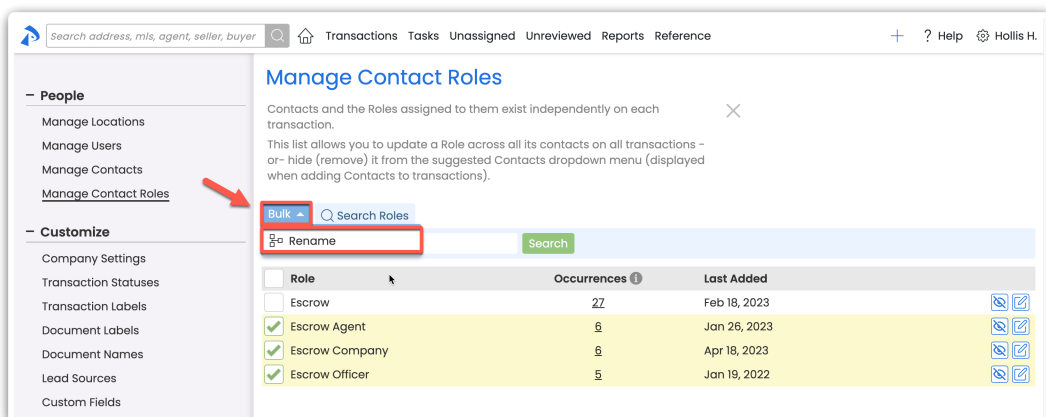
- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Manage Contact Roles] from the left menu.
- 3 Search by *Role* and select it from the resulting list or click [Search].



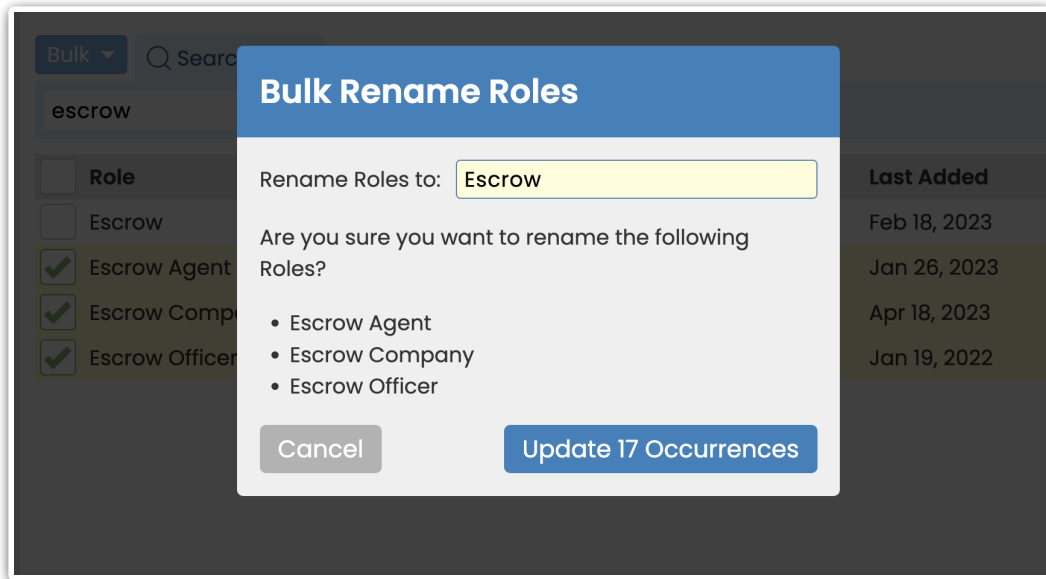
- 4 Check the boxes to the left of each *Role* you want to update.



- 5 Click [Bulk] then [Rename].



- 6 Make your desired changes to the *Role* then click [Update Occurrences]. The role will be updated for all occurrences.



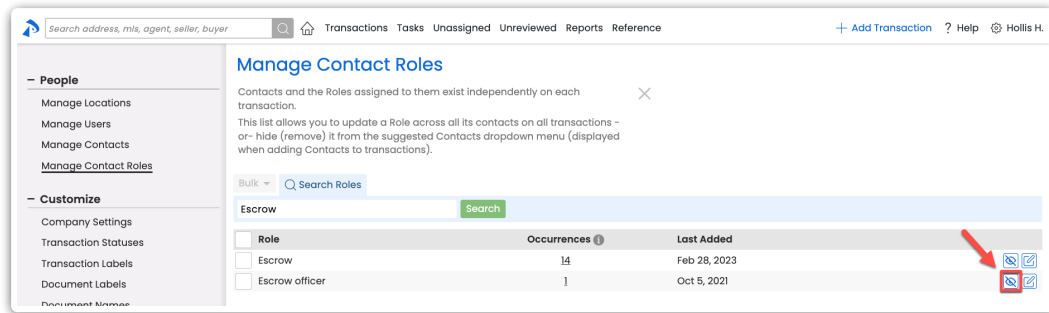
Hide a Contact Role from the Suggested Contacts Dropdown Menu

Learn how to hide a *Contact Role* if you don't want an obsolete or incorrect variation of a *Contact Role* to be suggested in the *Contacts* dropdown menu when *Contacts* are being added to transactions.

Who Can Do This? Master admins

To hide a *Contact Role* from the *Suggested Contacts* dropdown menu:

- 1 Go to [Admin / Settings](#) by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Manage Contact Roles] from the left menu.
- 3 Search by *Role* then select it from the resulting list or click [Search].
- 4 Click [the hide icon] next to the *Role* you want to hide. The *Role* will be hidden from the *Contacts* dropdown menu when *Contacts* are being added to transactions.



Download All Contacts

Learn how to download a spreadsheet report of your company's account-wide *Contacts*.

Who Can Do This? Master admins

To download the *All Contacts* spreadsheet:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [**Manage Contacts**] from the left menu.
- 3 Click [**Download All Contacts**] at the top of the page. The downloaded CSV will include the *Name, Role, Company, Phone, Fax* and *Email* of each *Contact* added across all transactions in your account, including who added the *Contact* and when.

	A	B	C	D	E	F	G	H	I
1	Name	Role	Company	Phone	Fax	Email	Added By	Added On	
2	Max Franklin	A little dog	Dog company		789-1230454	hollis+max@	hollis@pape	4/19/23	
3	George Jetsc	Outside List	Jetson Home	555-555-5555		hollis+georg	hollis@pape	4/18/23	
4	Barbara Shox	Outside List	Willowbend	234-234-2342		hollis+bs@p	hollis@pape	4/18/23	
5	James Oak	Outside List	Oak Road Real Estate			hollis+jo@p	hollis@pape	4/18/23	
6	George Leon	Buyer		578-456-4564		hollis+gl@p	monta@pap	4/18/23	
7	Hollis Decem	Release Test	Dec-21	2342342342		hollis+newer	hollis@pape	12/16/21	
8	Peace Willia	Title	new compan	123-123-123	123-123-123	peace@pape	monta@pap	4/10/23	
9	Monta Flemi	Escrow	FlemFlem Ex	2223334444		monta+ff@p	monta@pap	4/5/23	
10	Geoffrey Mc	Outside Age	Dogs Real Ex	555-555-555	789-1230454	hollis+geoffr	hollis@pape	4/3/23	
11	Susan Smyrn	Escrow	Escrow R' Us	(700) 859-25	(862) 718-85	monta+test	hollis@pape	4/3/23	
12	Peace Willia	Title	new compan	123-123-123	123-123-123	peace6@pa	monta@pap	3/30/23	
13	Peace Willia	Title	new compan	123-123-123	123-123-123	peace2@pa	monta@pap	3/30/23	
14	Jack Nicklaus	Attorney	Jack Nicklaus	(588) 931-51	(744) 736-73	hollis+try@o	kyndall+dev	3/20/23	
15	Mister Turtle	Escrow	Turtle Trust	2223332222	2342342342	hollis+turtle	hollis@pape	2/27/23	
16	Monta Milla	Buyer	Milla Realty			mjamcake+n	monta@pap	2/23/23	
17	Monta ABC	ABC Mortgage	ABC Title			mjamcake+a	monta@pap	2/23/23	
18	Someone at	loan closer	After Test /	545-555-555	123 Wow	hollis+abc@	monta@pap	2/21/23	
19	Bob Smith	Lender	123 Beach B	999-999-999	555-555-555	hollis+bob@	monta@pap	2/13/23	
20	April O'Neil	Seller	813 Briardliff	(860) 249-7821		hollis+april	monta@pap	2/13/23	
21	Leonardo	Buyer	Pizza Co / 12	555-555-555	Turtle	hollis+i@pa	monta@pap	2/13/23	
22	Jack Stewart	Attorney	Stewart Clos	585-380-4520		hollis+try@p	hollis@pape	2/6/23	
23	Jules Verne	CEO	UnderSea In	123-1234-77	9999	new@gmail,	monta@pap	1/17/23	
24	Monta Cupca	Referrer	Cupcake Cen	2225552222		monta+cupc	kyndall+dev	11/18/22	

Pipeline Pro Webinar Recording - The Versatility of Contacts

In this Pipeline Pro session you will learn how using **Contacts** can simplify actions, help you share information, and streamline your workflow. [View more Pipeline Pro Webinars here](#) →

🕒 11:45