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

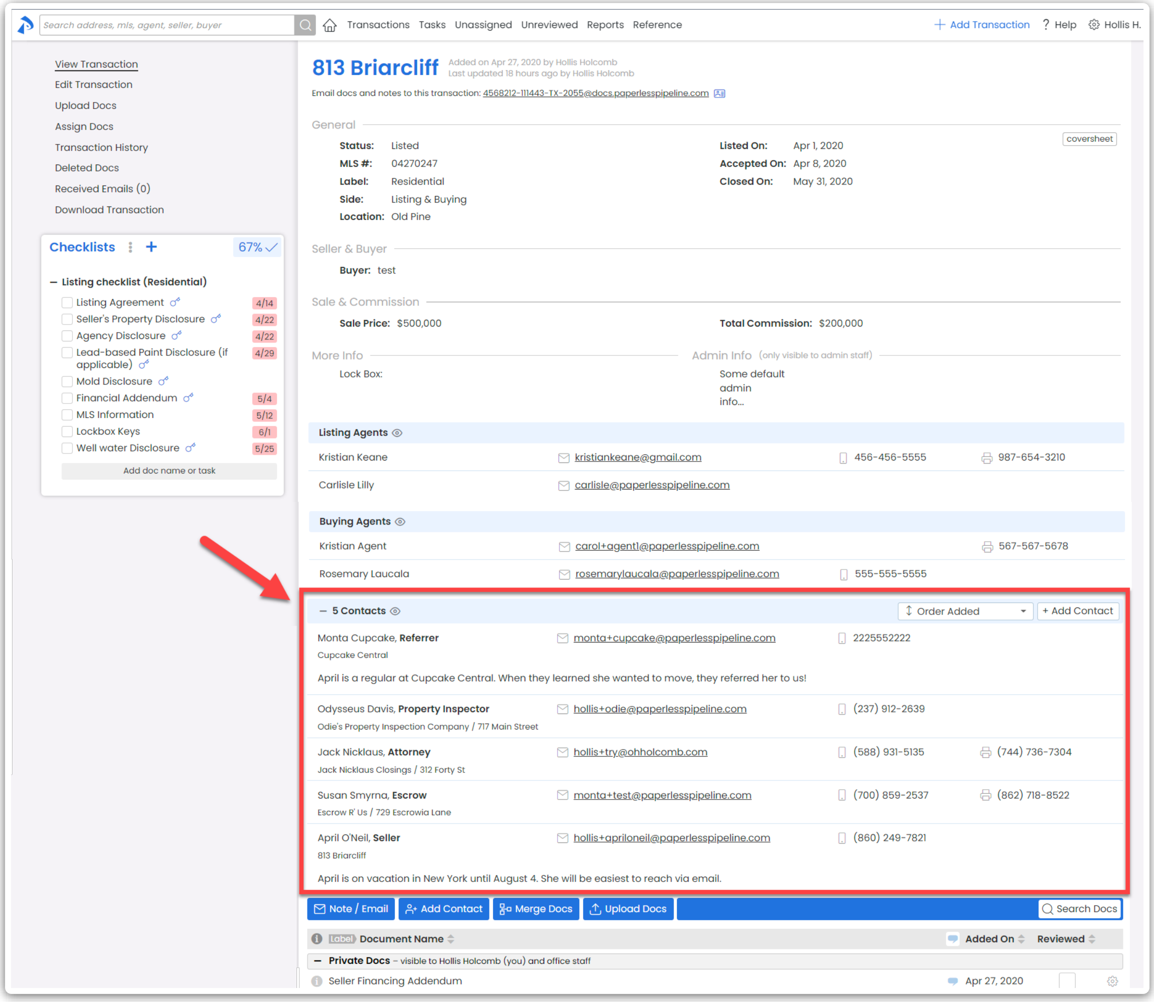
Learn how to view *Contacts* on transactions.

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

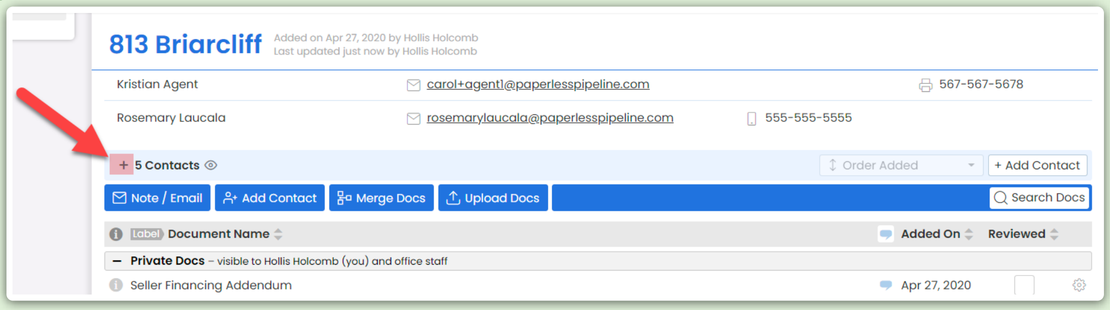
To view *Contacts* on a transaction:

1. **Go to a transaction.**

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



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



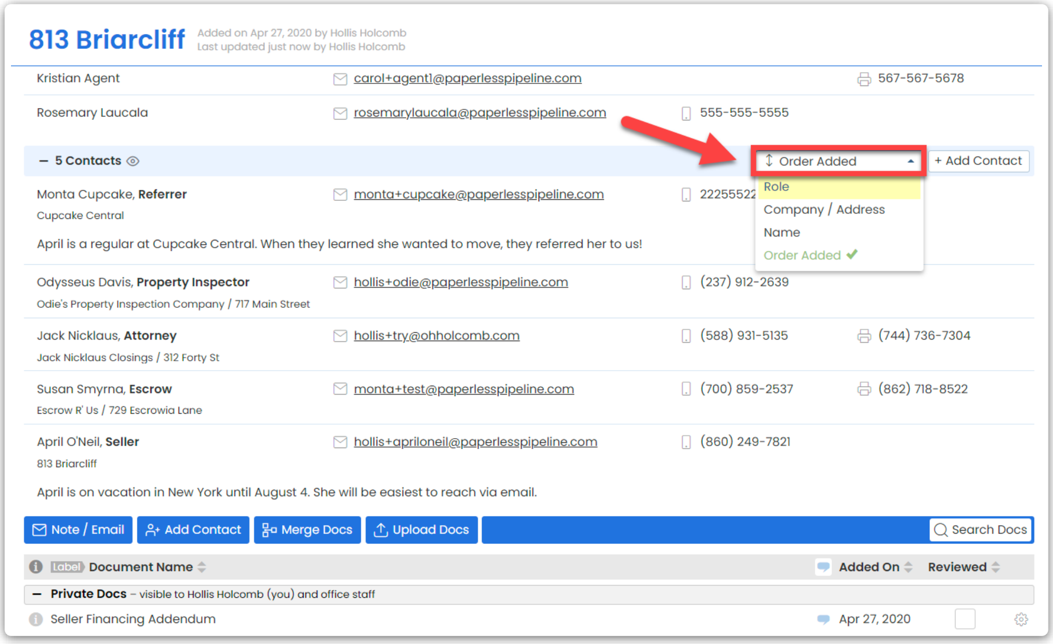
Sort Your View of Transaction Contacts

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.



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

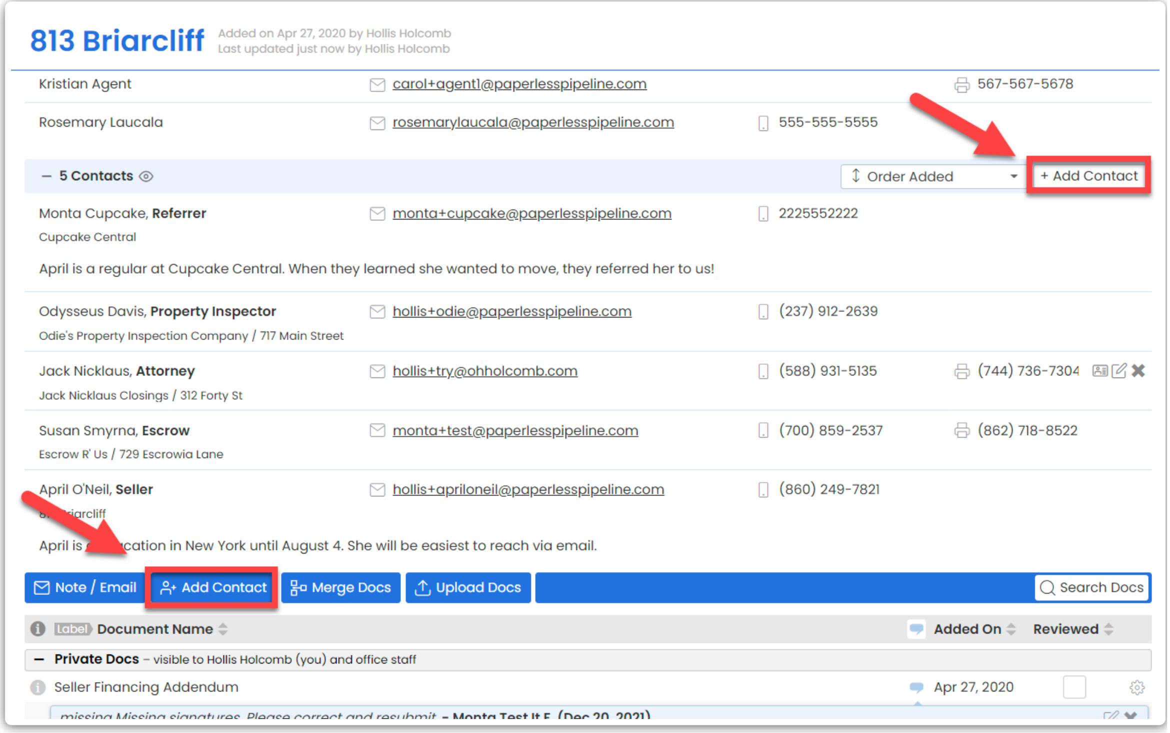
Add a Contact

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.



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

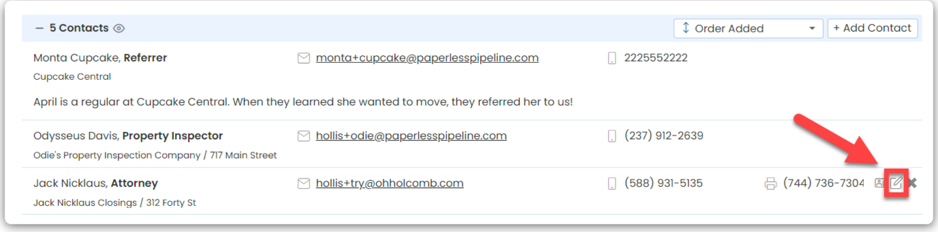
Edit a Contact

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

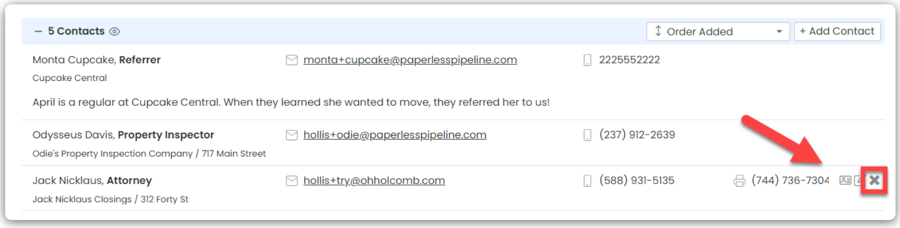
Learn how to delete a *Contact* on a transaction.

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

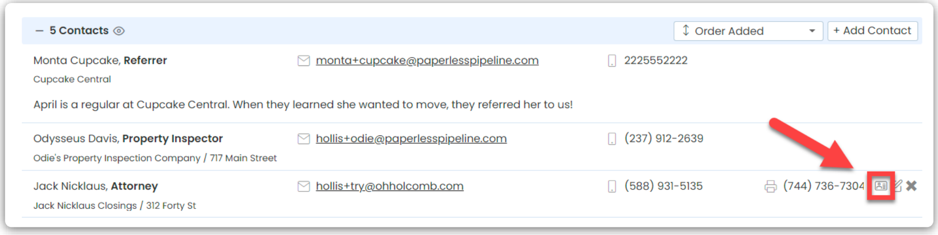
Download a Contact's vCard

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.



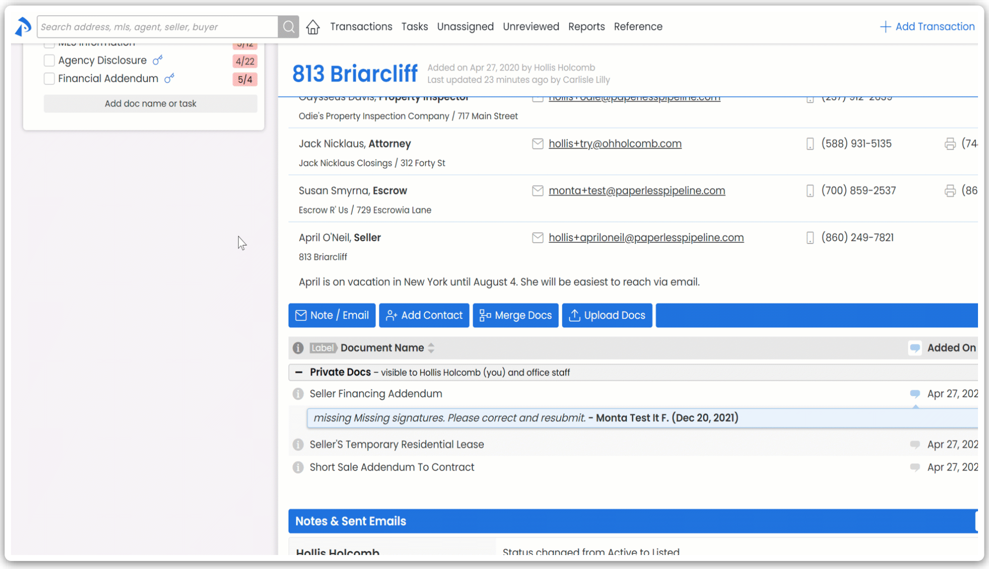
Email a Contact (Drag & Drop)

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.**



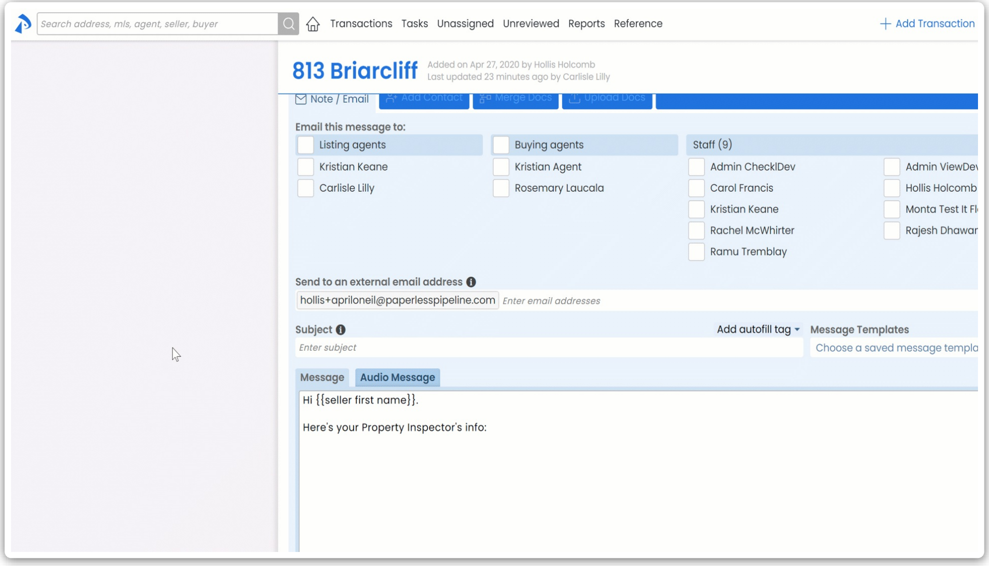
Share a Contact (Drag & Drop)

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

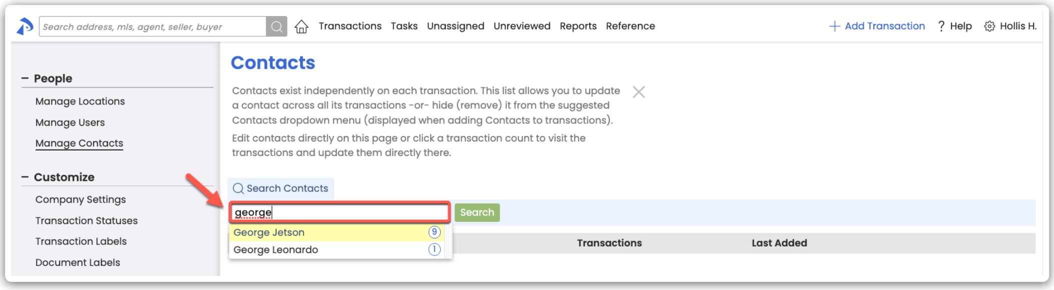
Learn how to make corrections to an incorrect variation of a *Contact's* details on all transactions where the *Contact* exists.

Who Can Do This? Master admins

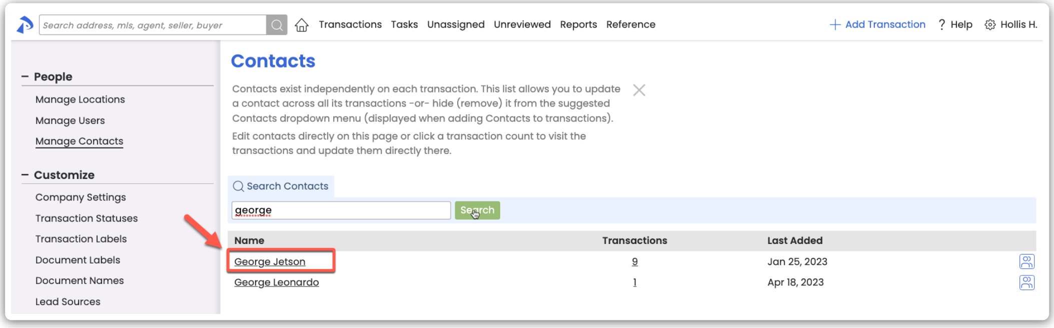
To update a specific *Contact* across all transactions:

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.

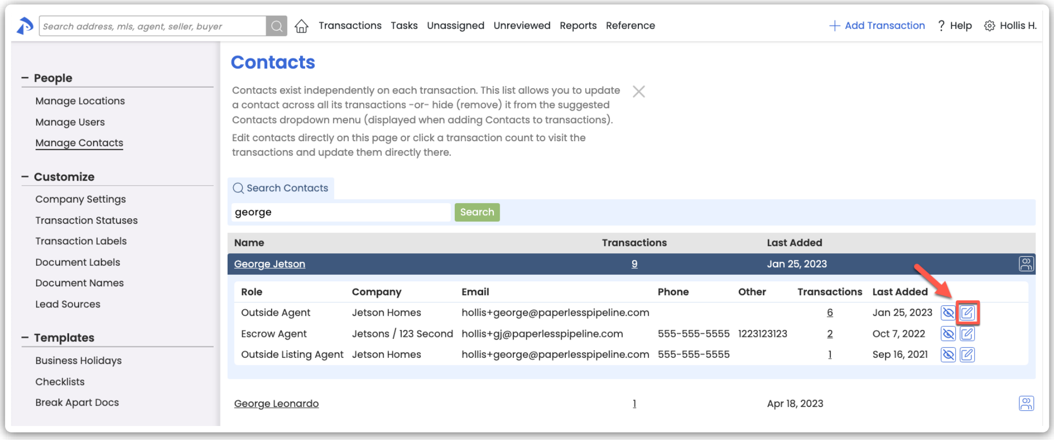
3 **Search by the *Contact's Name* then select it from the resulting list or click [Search].**



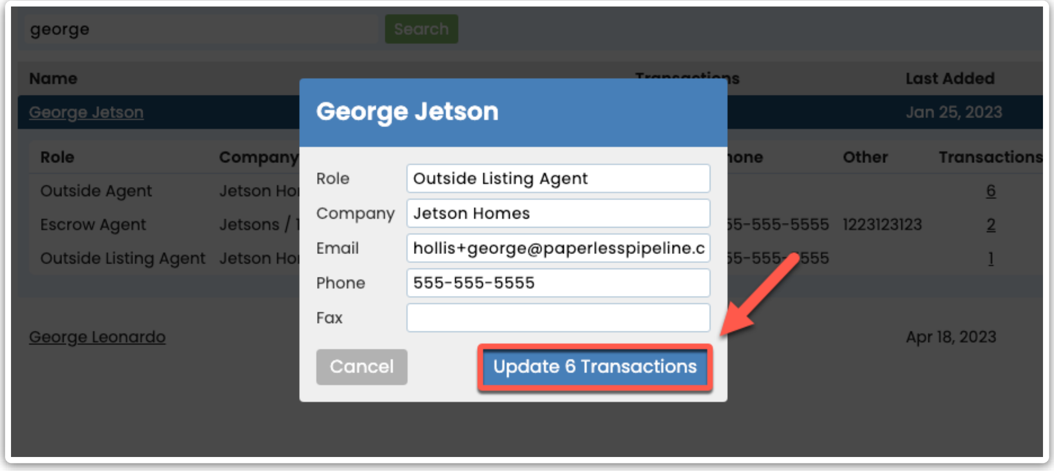
4 **Click the name of the *Contact* you want to update from the list.**



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.



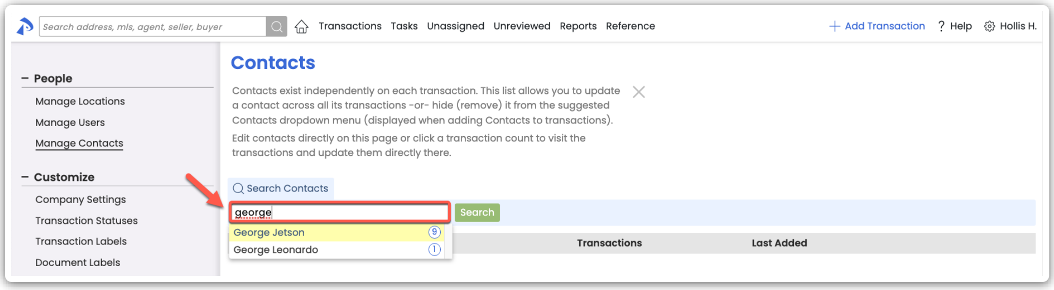
Hide a Contact from the Suggested Contacts Dropdown Menu

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.

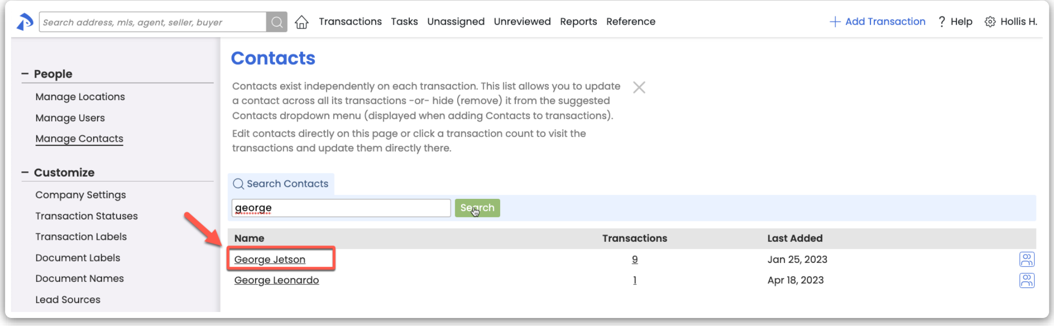
Who Can Do This? Master admins

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

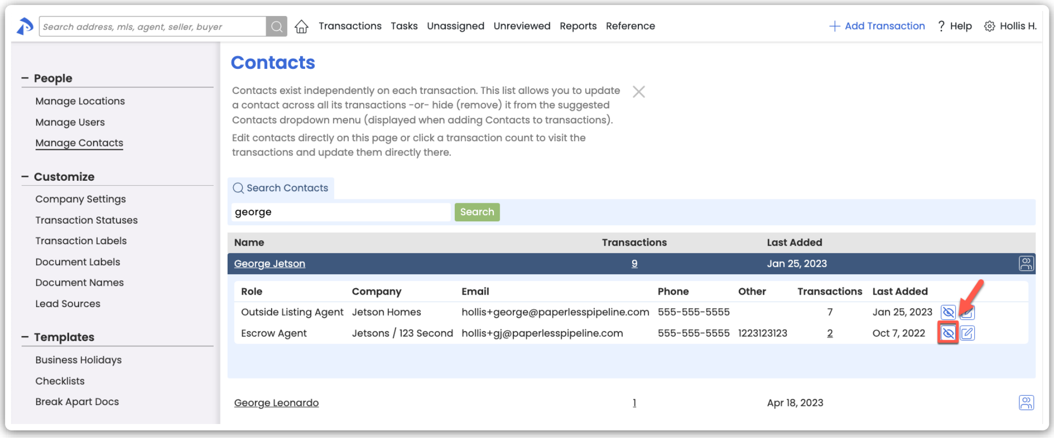
1. **Go to** Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].
2. **Select [Manage Contacts]** from the left menu.
3. **Search by the *Contact's Name*** then **select it from the resulting list or click [Search].**



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.

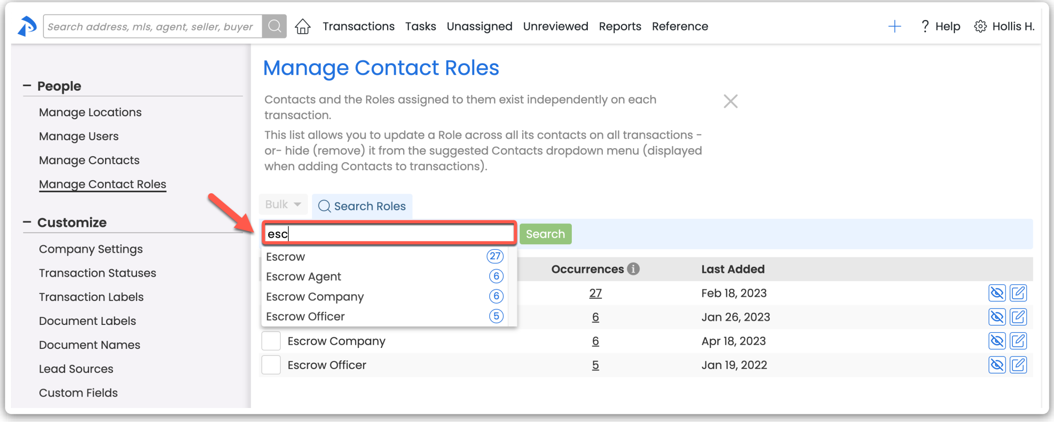
Who Can Do This? Master admins

To update a specific *Contact Role*:

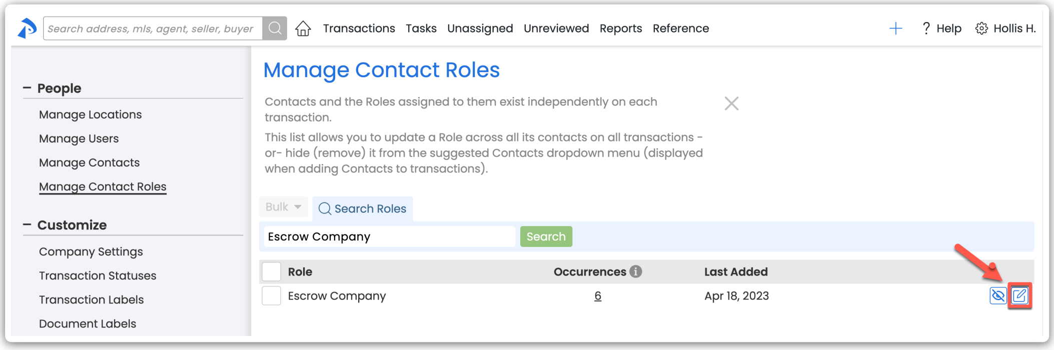
1 **Go to Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].

2 **Select [Manage Contact Roles]** from the left menu.

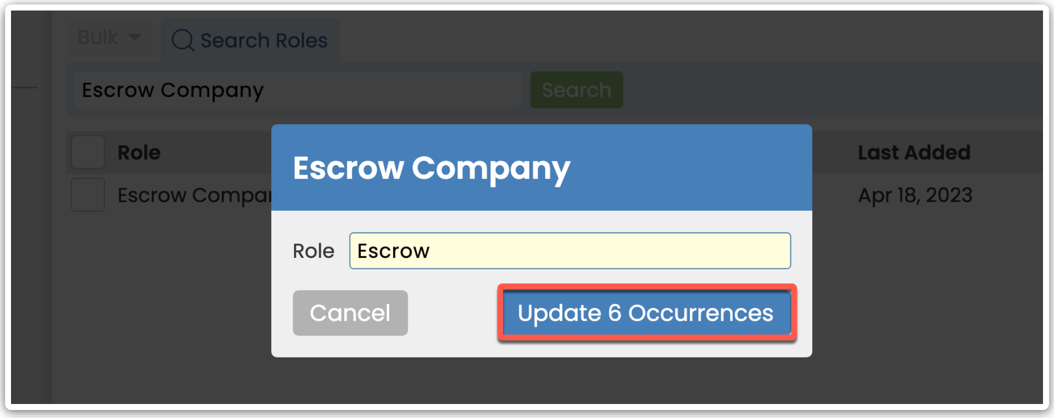
3 **Search by *Role*** then **select it from the resulting list or click [Search].**



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.



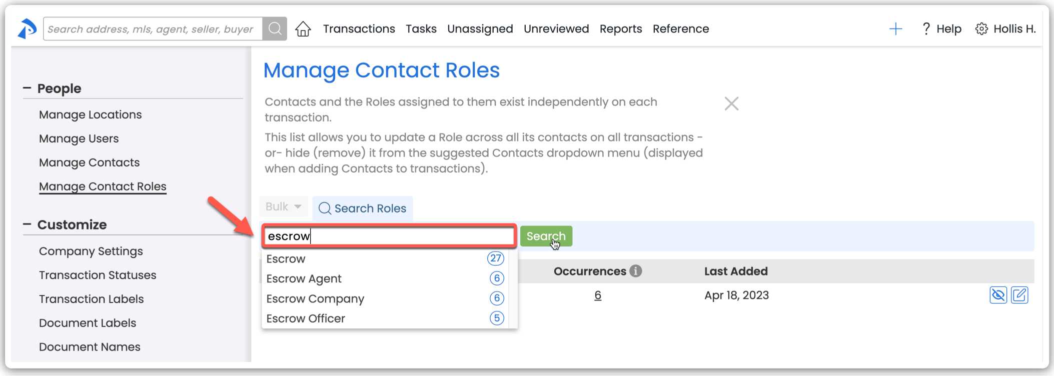
Bulk Update Similar Roles Across All Transactions (Consolidate Roles)

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

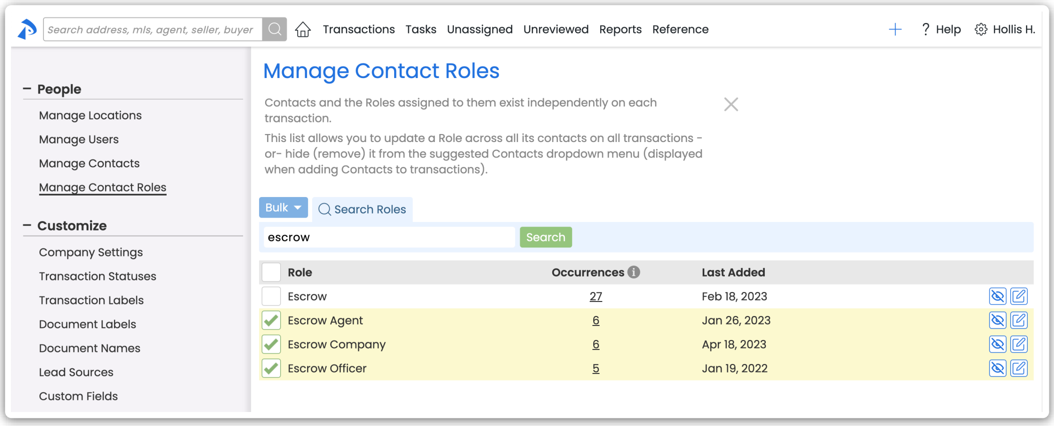
Who Can Do This? Master admins

To bulk update similar *Roles* across all transactions:

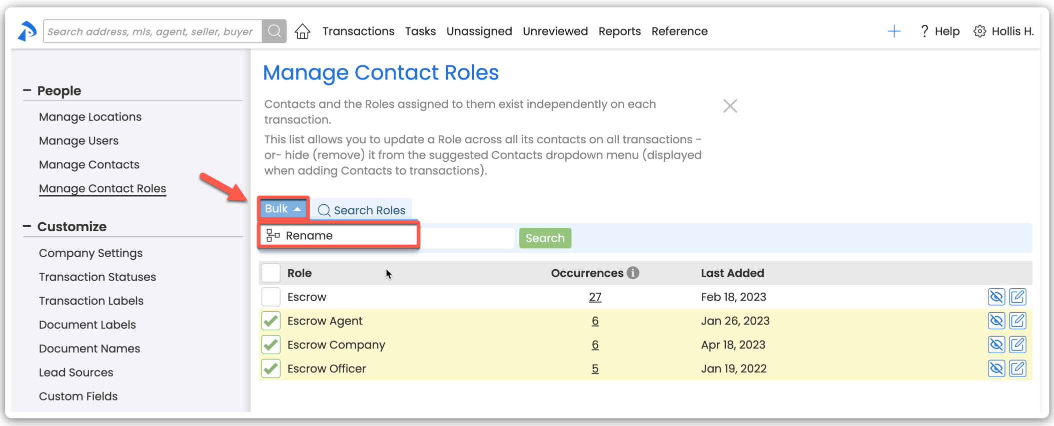
1. **Go to** Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].
2. **Select [Manage Contact Roles]** from the left menu.
3. **Search by** ***Role*** and **select it from the resulting list or click [Search].**



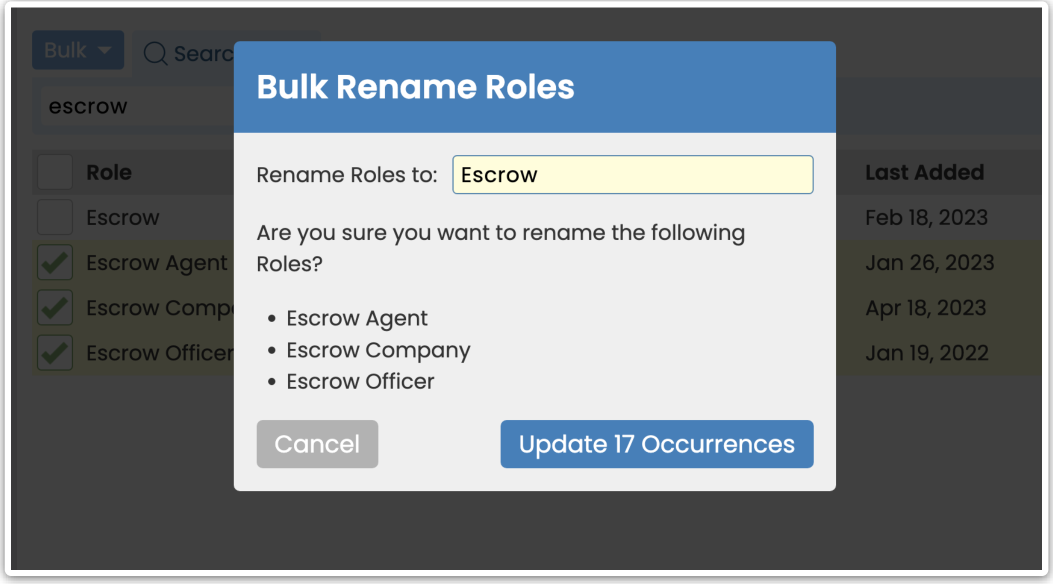
4. **Check the boxes to the left of each** ***Role*** **you want to update.**



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.



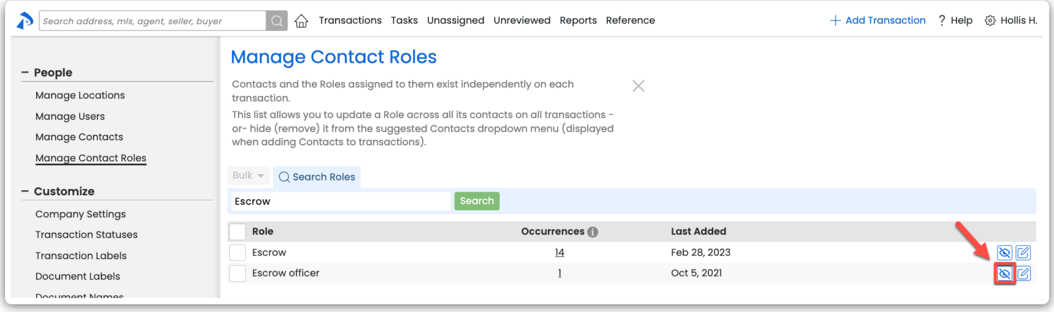
Hide a Contact Role from the Suggested Contacts Dropdown Menu

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.



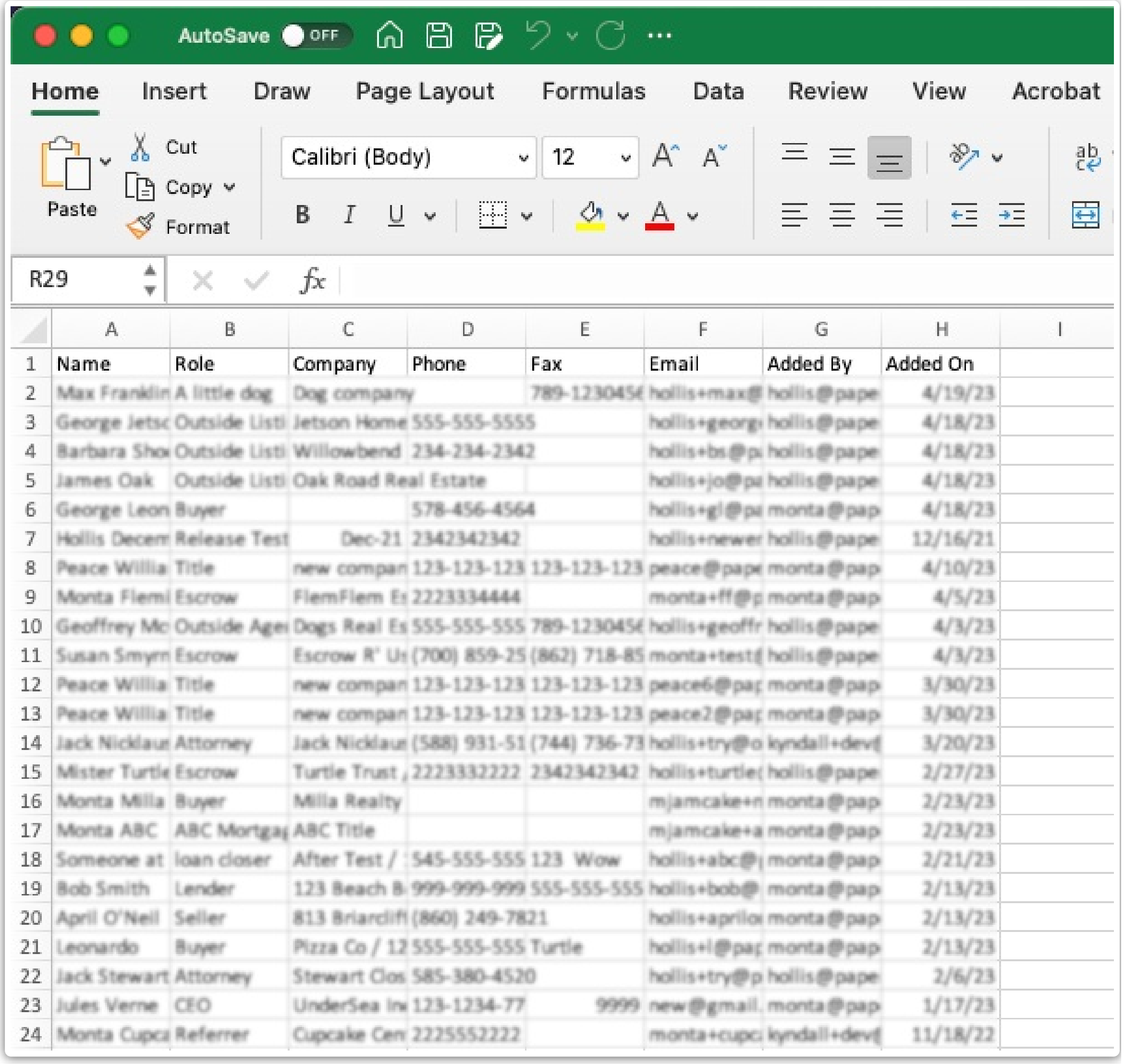
Download All Contacts

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.



	Name	Role	Company	Phone	Fax	Email	Added By	Added On
2	Max Franklin	A little dog	Dog company		789-1230456	hollis+max@	hollis@pape	4/19/23
3	George Jetsc	Outside Listi	Jetson Home	555-555-5555		hollis+georg	hollis@pape	4/18/23
4	Barbara Sho	Outside Listi	Willowbend	234-234-2342		hollis+bs@p	hollis@pape	4/18/23
5	James Oak	Outside Listi	Oak Road Real Estate			hollis+jo@pa	hollis@pape	4/18/23
6	George Leon	Buyer		578-456-4564		hollis+gl@pa	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 Es	2223334444		monta+ff@p	monta@pap	4/5/23
10	Geoffrey Mc	Outside Agen	Dogs Real Es	555-555-555	789-1230456	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@pap	monta@pap	3/30/23
13	Peace Willia	Title	new compan	123-123-123	123-123-123	peace2@pap	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 Mortgag	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 Briarcliff	(860) 249-7821		hollis+aprilo	monta@pap	2/13/23
21	Leonardo	Buyer	Pizza Co / 12	555-555-555	Turtle	hollis+l@pap	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 Inc	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