# 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.

	Added on Apr 27.2	1000 kv Helle Heleensk		
View Transaction	813 Briarcliff Added on Apr 27, 2 Last updated 18 ho	burs ago by Hollis Holcomb		
Edit Transaction	Email docs and notes to this transaction: 4568212-1	11443-TX-2055@docs.paperlesspipeline.com 🖾		
Upload Docs	Ormani			
Assign Docs	General			covershe
Transaction History	Status: Listed MLS #: 04270247	Listed On: Ap Accepted On: Ap	r 1, 2020	
Deleted Docs	Label: Residential		iy 31, 2020	
Received Emails (0)	Side: Listing & Buying	closed on. Mc	19 51, 2020	
Download Transaction	Location: Old Pine			
Checklists : + 67%	Seller & Buyer			
	Buyer: test			
<ul> <li>Listing checklist (Residential)</li> </ul>	buyon cost			
Listing Agreement of	4/14 Sale & Commission —			
Seller's Property Disclosure σ <sup>6</sup> 4/22           Agency Disclosure σ <sup>6</sup> 4/22           Lead-based Paint Disclosure (if         4/29		Total Commission	n: \$200,000	
		Admin Info (only visible	to admin staff)	
applicable) of	Lock Box:	Some default		
Financial Addendum of	5/4	admin		
	5/12	info		
	6/1 Listing Agents			
🗌 Well water Disclosure 🝼 🛛 🖪	5/25 Kristian Keane	kristiankeane@gmail.com	. 456-456-5555	A 987-654-3210
Add doc name or task	Carlisle Lilly			
	Buying Agents 💿			
• • • • • • • • • • • • • • • • • • •	Kristian Agent	carol+agentl@paperlesspipeline.com		a 567-567-5678
	Rosemary Laucala	🖂 rosemarylaucala@paperlesspipeline.com	555-555-5555	
	- 5 Contacts		1 Order	Added - + Add Conta
	Monta Cupcake, <b>Referrer</b> Cupcake Central	Monta+cupcake@paperlesspipeline.com	. 2225552222	
	April is a regular at Cupcake Central. When	n they learned she wanted to move, they referred her to us		
	Odysseus Davis, <b>Property Inspector</b> Odie's Property Inspection Company / 717 Main Str	<u>hollis+odie@paperlesspipeline.com</u> reet	. (237) 912-2639	
	Jack Nicklaus, <b>Attorney</b> Jack Nicklaus Closings / 312 Forty St	➢ hollis+try@ohholcomb.com	. (588) 931-5135	📇 (744) 736-7304
	Susan Smyrna, <b>Escrow</b> Escrow R' Us / 729 Escrowia Lane	M monta+test@paperlesspipeline.com	. (700) 859-2537	🖶 (862) 718-8522
	April O'Neil, <b>Seller</b> 813 Briarcliff	M hollis+apriloneil@paperlesspipeline.com	. (860) 249-7821	
	April is on vacation in New York until Augus	t 4. She will be easiest to reach via email.		
	Mote / Email A+ Add Contact 🖁 M	erge Docs 🕂 Upload Docs		Q Search Do
	0			Added On 🗘 Reviewed 🗘
	🚯 🔯 Document Name ≑			

Click [1] to show the *Contacts* section or [1] to hide it. Pipeline will remember your preference whenever you return to any transaction later.

	813 Briarcliff Added on Apr 27, 20 Last updated just no	20 by Hollis Holcomb ow by Hollis Holcomb	
<b>.</b> [	Kristian Agent	carol+agent1@paperlesspipeline.com	land the second
	Rosemary Laucala	rosemarylaucala@paperlesspipeline.com	. 555-555-5555
	+ 5 Contacts ③		Order Added     + Add Contact
	⊠ Note / Email 🛛 A+ Add Contact 🛛 🗄 Me	rge Docs 🔿 Upload Docs	Q Search Docs
	🚺 Label) Document Name 🌲		Added On Reviewed
	- Private Docs - visible to Hollis Holcomb (you)	and office staff	
	Seller Financing Addendum		🌩 Apr 27, 2020 👘 🛞

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.

Kristian Agent	carol+agentl@paperlesspipeline.com			8 567-56	7-5678
Rosemary Laucala	🖂 rosemarylaucala@paperlesspipeline.com	. 555-555	-5555		
- 5 Contacts 💿			Crder Adde	ed 🔺	+ Add Contac
Monta Cupcake, <b>Referrer</b> Cupcake Central	monta+cupcake@paperlesspipeline.com	. 2225552	Role Company / A Name	ddress	
April is a regular at Cupcake Central, when t	hey learned she wanted to move, they referred her to us!		Order Added	<b>~</b>	
Odysseus Davis, <b>Property Inspector</b> Odie's Property Inspection Company / 717 Main Stree	hollis+odie@paperlesspipeline.com	. (237) 912	-2639		
Jack Nicklaus, <b>Attorney</b> Jack Nicklaus Closings / 312 Forty St	hollis+try@ohholcomb.com	. (588) 93	1-5135	🖶 (744) 7	36-7304
Susan Smyrna, <b>Escrow</b> Escrow R' Us / 729 Escrowia Lane	Monta+test@paperlesspipeline.com	. (700) 85	9-2537	🖶 <b>(</b> 862) 7	18-8522
April O'Neil, <b>Seller</b> 813 Briarcliff	hollis+apriloneil@paperlesspipeline.com	. (860) 24	9-7821		
April is on vacation in New York until August 4	1. She will be easiest to reach via email.				
∽ Note / Email 🛛 음+ Add Contact 🛛 뮴= Mer	ge Docs ① Upload Docs				Q Search Do
🕽 🛯 Label) Document Name ≑			<b>—</b> A	dded On ≑	Reviewed ≑
<ul> <li>Private Docs – visible to Hollis Holcomb (you) a</li> </ul>					

**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:



## 2 Click [+ Add Contact] above the Docs section.

Kristian Agent	carol+agent1@paperlesspipeline.com		a 567-567-5678
Rosemary Laucala	🖂 rosemarylaucala@paperlesspipeline.com	. 555-555-5555	
- 5 Contacts 💿		1 Order	Added 👻 + Add Conta
Monta Cupcake, <b>Referrer</b> Cupcake Central	Monta+cupcake@paperlesspipeline.com	. 2225552222	
April is a regular at Cupcake Central. When	they learned she wanted to move, they referred her to us!		
Odysseus Davis, <b>Property Inspector</b> Odie's Property Inspection Company / 717 Main Stre	hollis+odie@paperlesspipeline.com	. (237) 912-2639	
Jack Nicklaus, <b>Attorney</b> Jack Nicklaus Closings / 312 Forty St	hollis+try@ohholcomb.com	. (588) 931-5135	🖶 (744) 736-7304 🖽 🗹
Susan Smyrna, <b>Escrow</b> Escrow R' Us / 729 Escrowia Lane	Monta+test@paperlesspipeline.com	. (700) 859-2537	🖶 (862) 718-8522
April O'Neil, <b>Seller</b> 8. storcliff	hollis+apriloneil@paperlesspipeline.com	. (860) 249-7821	
April is cation in New York until August	4. She will be easiest to reach via email.		
∽ Note / Email 🛛 음+ Add Contact 🛛 뭄= Me	rge Docs 🕂 Upload Docs		Q Search Do
Label Document Name ≑			Added On 🗘 Reviewed 🗘
Lobal Document Name      Private Docs - visible to Hollis Holcomb (you)	and office staff		Added On 🗘 Reviewed

**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.



– 5 Contacts ⊚		Crder Added	▼ + Add Con
Monta Cupcake, <b>Referrer</b> Cupcake Central	Monta+cupcake@paperlesspipeline.com	. 2225552222	
April is a regular at Cupcake Central. When the	y learned she wanted to move, they referred her to us!		•
Odysseus Davis, <b>Property Inspector</b> Odie's Property Inspection Company / 717 Main Street	Mallis+odie@paperlesspipeline.com	. (237) 912-2639	

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.

– 5 Contacts ⊚		1 Ord	ler Added 🔹 + Add Contac
Monta Cupcake, <b>Referrer</b> Cupcake Central	Monta+cupcake@paperlesspipeline.com	. 2225552222	
April is a regular at Cupcake Central. When the	y learned she wanted to move, they referred her to us!		•
Odysseus Davis, <b>Property Inspector</b> Odie's Property Inspection Company / 717 Main Street	hollis+odie@paperlesspipeline.com	. (237) 912-2639	
Jack Nicklaus, <b>Attorney</b> Jack Nicklaus Closinas / 312 Forty St	hollis+try@ohholcomb.com	. (588) 931-5135	a (744) 736-7304 🖪 🖇

#### 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 Addressfield.

Search address, mis, agent, seller, bu		🔾 🏠 Transactions Tasks Unassigned	Unreviewed Reports Reference	+ A	dd Transactio
☐ Agency Disclosure ♂ ☐ Financial Addendum ♂	4/22 5/4	813 Briarcliff Added on Apr 2 Last updated 23	7, 2020 by Hollis Holcomb minutes ago by Carlisle Lilly		
Add doc name or task		Odie's Property Inspection Company / 717 Main	Street	(207) 312 2000	
		Jack Nicklaus, <b>Attorney</b> Jack Nicklaus Closings / 312 Forty St	hollis+try@ohholcomb.com	。 (588) 931-5135	⊜ (3
		Susan Smyrna, <b>Escrow</b> Escrow R' Us / 729 Escrowia Lane	Monta+test@paperlesspipeline.com	. (700) 859-2537	⊜ (
	Do-	April O'Neil, <b>Seller</b> 813 Briarcliff	hollis+apriloneil@paperlesspipeline.com	. (860) 249-7821	
		April is on vacation in New York until Aug	ust 4. She will be easiest to reach via email.		
		▶ Note / Email A* Add Contact 문	Merge Docs 🔿 Upload Docs		
		🚯 🚺 Document Name 🗘			📃 Added C
		- Private Docs - visible to Hollis Holcomb (ye	ou) and office staff		
		Seller Financing Addendum			💻 Apr 27, 2
		missing Missing signatures. Please co	rrect and resubmit Monta Test It F. (Dec 20, 2021)		-
		Seller'S Temporary Residential Lease			Apr 27, 2
		Short Sale Addendum To Contract			Apr 27, 2
		Notes & Sent Emails			
		Hollis Holcomb	Status changed from Active to Listed		

#### 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.

Search address, mls, agent, seller, buyer	🔍 🏠 Transactions Tasks U	nassigned Unreviewed Reports Referer	nce	+ Add Transaction
	813 Briarcliff Add Lost	ed on Apr 27, 2020 by Hollis Holcomb updated 23 minutes ago by Carlisle Lilly		
	Mote / Email	tact 물리Merge Docs 간 Upload Docs		
	Email this message to:			
	Listing agents	Buying agents	Staff (9)	
	Kristian Keane	Kristian Agent	Admin ChecklDev	Admin ViewDev
	Carlisle Lilly	Rosemary Laucala	Carol Francis	Hollis Holcomb
			Kristian Keane	Monta Test It Fl
			Rachel McWhirter	Rajesh Dhawar
			Ramu Tremblay	
	Send to an external email add	ress 🚯		
	hollis+apriloneil@paperlesspi	peline.com Enter email addresses		
	Subject ()		Add autofill tag - Me	ssage Templates
2	Enter subject			noose a saved message templa
Leg"	Message Audio Message			
	Hi {{seller first name}}.			
	Here's your Property Inspect	or's info		
	Here's your Property Inspect	ors into.		

#### Manage Contacts Across All Transactions

A master admin can globally manage Contacts to update an incorrect variation of aContact'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.

People	Contacts			
Manage Locations Manage Users	Contacts exist independently on each transac a contact across all its transactions -or- hide Contacts dropdown menu (displayed when a	(remove) it from the suggested		
Manage Contacts	Edit contacts directly on this page or click a tr transactions and update them directly there.	ansaction count to visit the		
Customize	Search Contacts			
Company Settings Transaction Statuses		Segrch		
Transaction Labels	Name	Transactions	Last Added	
Document Labels	George Jetson	9	Jan 25, 2023	
	George Leonardo		Apr 18, 2023	

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

Search address, mls, agent, seller, buyer	Q 🔂 Transa	actions Tasks Unass	igned Unreviewed Reports Refer	ence		+ Add	Transaction	? Help	Hollis H.
- People Manage Locations Manage Users Manage Contacts	a contact across all its t Contacts dropdown me	ransactions -or- hide nu (displayed when a n this page or click a tro	tion. This list allows you to update (remove) it from the suggested dding Contacts to transactions). ansaction count to visit the	×					
- Customize	O Search Contacts								
Company Settings	~		Search						
Transaction Statuses	george		search						
Transaction Labels	Name		Transa	ictions	Last	Added			
Document Labels	George Jetson			2	Jan 2	25, 2023	<ul> <li></li> </ul>		B
Document Names	Role	Company	Email	Phone	Other	Transactions	Last Added		
Lead Sources	Outside Agent	Jetson Homes	hollis+george@paperlesspipeline.c	om		<u>6</u>	Jan 25, 2023	× C	
– Templates	Escrow Agent	Jetsons / 123 Second	hollis+gj@paperlesspipeline.com	555-555-5555	1223123123	2	Oct 7, 2022	8	·
Business Holidays	Outside Listing Agent	Jetson Homes	hollis+george@paperlesspipeline.c	om 555-555-5555		1	Sep 16, 2021	Q Z	
Checklists									
Break Apart Docs	<u>George Leonardo</u>				Apr 1	8, 2023			0

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

george		s	earch			
Name			Transastie	ns	Las	t Added
George Jetson		George	Jetson			ו 25, 2023
Role	Company			none	Other	Transactions
Outside Agent	Jetson Ho	Role	Outside Listing Agent			<u>6</u>
Escrow Agent	Jetsons / 1	Company	Jetson Homes	55-555-5555	1223123123	2
Outside Listing Agent	Jetson Hoi	Email	hollis+george@paperlesspipeline.c	55-555-0555		1
		Phone	555-555-5555			
		Fax				
<u>George Leonardo</u>		Cancel	Update 6 Transactions		Api	r 18, 2023

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].

Search address, mls, agent, selle	buyer 🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference	+ Add Transaction ? Help ③ Hollis					
People	Contacts						
Manage Locations	Contacts exist independently on each transaction. This list allows you to update X a contact across all its transactions -or- hide (remove) it from the suggested						
Manage Users	Contacts dropdown menu (displayed when adding Contacts to transactions).	Contacts dropdown menu (displayed when adding Contacts to transactions).					
Manage Contacts	Edit contacts directly on this page or click a transaction count to visit the transactions and update them directly there.						
Customize	Q Search Contacts						
Company Settings	george						
Transaction Statuses							
Transaction Labels	George Jetson (9)	Last Added					
Document Labels	George Leonardo	Lust Added					

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

People	Contacts			
Manage Locations	Contacts exist independently on each trans a contact across all its transactions -or- hid			
Manage Users	Contacts dropdown menu (displayed when	adding Contacts to transactions).		
Manage Contacts	Edit contacts directly on this page or click a transactions and update them directly there			
Customize	Q Search Contacts			
Company Settings				
Transaction Statuses	george	Segrch		
Transaction Labels	Name	Transactions	Last Added	
Document Labels	George Jetson	9	Jan 25, 2023	
Document Names	George Leonardo		Apr 18, 2023	

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

	<b>0</b>										
- People	Contacts										
Manage Locations	a contact across all its	Contacts exist independently on each transaction. This list allows you to update a contact across all its transactions -or - hide (remove) it from the suggested									
Manage Users		Contacts dropdown menu (displayed when adding Contacts to transactions).									
Manage Contacts		on this page or click a tr ate them directly there.	ansaction count to visit the								
- Customize	Search Contacts										
Company Settings	_		_								
Transaction Statuses	george		Search								
Transaction Labels	Name		Transactio	ons	Last A	Added					
Document Labels	George Jetson		ð		Jan 2	5, 2023			Ę		
Document Names	Role	Company	Email	Phone	Other	Transactions	Last Added		/		
Lead Sources	Outside Listing Agen	t Jetson Homes	hollis+george@paperlesspipeline.com	555-555-5555		7	Jan 25, 2023				
- Templates	Escrow Agent	Jetsons / 123 Second	hollis+gj@paperlesspipeline.com	555-555-5555	1223123123	2	Oct 7, 2022	N 2			
Business Holidays											
Checklists											

## 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) aRole 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 aContact 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].

	Manage Contact	t Roles			
People					
Manage Locations	Contacts and the Roles assign transaction.	ed to them exist	independently on each	×	
Manage Users	This list allows you to update a				
Manage Contacts	or- hide (remove) it from the s when adding Contacts to trans		cts dropdown menu (disp	blayed	
Manage Contact Roles	when during contacts to trans	sactions).			
	Bulk - Q Search Roles				
Customize	esc		Search		
Company Settings	Escrow	(27)			
Transaction Statuses	Escrow Agent	6	Occurrences 🕕	Last Added	
	°	6	27	Feb 18, 2023	<b>N</b>
Transaction Labels	Escrow Company				
Transaction Labels Document Labels	Escrow Company Escrow Officer	5	<u>6</u>	Jan 26, 2023	Q [2
		5	<u>6</u>	Jan 26, 2023 Apr 18, 2023	<u>N</u> N

#### 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 🔻 📿 Search	Roles	
Escrow Company		
Role Escrow Compai	Escrow Company	Last Added Apr 18, 2023
	Role Escrow Cancel Update 6 Occurrences	Api 10, 2020

#### 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.

<sup>3</sup> 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.

People	Manage Contact R			
Manage Locations	Contacts and the Roles assigned to transaction.	o them exist independently on each	×	
Manage Users		across all its contacts on all transact		
Manage Contacts	or- hide (remove) it from the sugg when adding Contacts to transacti	ested Contacts dropdown menu (disp ions).	blayed	
Manage Contact Roles	Bulk - Q Search Roles			
Customize	escrow	Search		
Company Settings				
Transaction Statuses	Role	Occurrences 🕕	Last Added	
Transaction Labels	Escrow	27	Feb 18, 2023	0
Document Labels	Escrow Agent	<u>6</u>	Jan 26, 2023	0
Document Names	Escrow Company	<u>6</u>	Apr 18, 2023	80
			Jan 19, 2022	<b>X</b>

## 5 Click [Bulk] then [Rename].

People Manage Locations Manage Locations Manage Contacts and the Roles assigned to them exist independently on each transaction. This list allows you to update a Role across all its contacts on all transactions - or - hide (remove) it from the suggested Contacts dropdown menu (displayed when adding Contacts to transactions). Bulk © Search Roles Company Settings Transaction Statuses Transaction Labels Role to Coccurrences Last Added Escrow 2Z Feb 18, 2023	
Manage Locations       transaction.         Manage Users       This list allows you to update a Role across all its contacts on all transactions -         Manage Contacts       This list allows you to update a Role across all its contacts on all transactions -         Manage Contacts       This list allows you to update a Role across all its contacts on all transactions -         Company Settings       Bulk Q Search Roles         Transaction Statuses       Role         Transaction Labels       Escrow         2Z       Feb 18, 2023	
Manage Contacts       or - hide (remove) it from the suggested Contacts dropdown menu (displayed when adding Contacts to transactions).         Bulk C Search Roles       Search         Company Settings       Role       Occurrences I       Last Added         Transaction Statuses       Escrow       2Z       Feb 18, 2023         Tensoction Labels       Feb 18, 2023       Search	
Manage Contacts     when adding Contacts to transactions).       Bulk     Q Search Roles       Bulk     Q Search Roles       Company Settings     Role     Occurrences     Last Added       Transaction Statuses     Escrow     2Z     Feb 18, 2023	
Manage Contact Roles       Bulk · Q Search Roles         - Customize       Bulk · Q Search Roles         Company Settings       Role · Occurrences I Last Added         Transaction Labels       Escrow       2Z       Feb 18, 2023	
Transaction Statuses     Role     Occurrences     Last Added       Transaction Labels     Escrow     27     Feb 18, 2023	
	2 Ø
Document Labels 6 Jan 26, 2023	2 10
Document Names 🖉 Escrow Company <u>6</u> Apr 18, 2023	2 0
Lead Sources <u>5</u> Jan 19, 2022	Q C

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.

Search address, mis, agent, selle	er, buyer Q 🏠 Transactions Tasl	ks Unassigned Unreviewed Reports Refe	rence	+ Add Transaction ?	Help 🛞 Hollis H		
– People	Manage Contact Ro		×				
Manage Locations	transaction.						
Manage Users		across all its contacts on all transactions -					
Manage Contacts	or- hide (remove) it from the sugges when adding Contacts to transaction	ited Contacts dropdown menu (displayed ns).					
Manage Contact Roles							
	Bulk - Q Search Roles						
- Customize	Escrow	Search					
Company Settings	Laciow	Section 1					
Transaction Statuses	Role	Occurrences 🕦	Last Added				
Transaction Labels	Escrow	14	Feb 28, 2023		- 🔪 🖎 🗹		
Document Labels	Escrow officer	1	Oct 5, 2021		<u> </u>		
Document Names					_		

## **Download All Contacts**

Learn how to download a spreadsheet report of your company's account-wideContacts.

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.

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R2	29 🛔	× v	fx						
	A	В	С	D	E	F	G	н	I
1	Name	Role	Company	Phone	Fax	Email	Added By	Added On	
2	Max Franklin	A little dog	Dog company	Ý	789-1230456	hollis+max@	hollis@pape	4/19/23	
3	George Jetsc	Outside Listi	Jetson Home	555-555-555	5	hollis+georg	hollis@pape	4/18/23	
4	Barbara Sho	Outside Listi	Willowbend	234-234-234	2	hollis+bs@p	hollis@pape	4/18/23	
5	James Oak	Outside Listi	Oak Road Re	al Estate		hollis+jo@pa	hollis@pape	4/18/23	
6	George Leon	Buyer		578-456-456	4	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 company	123-123-123	123-123-123	peace@pape	monta@pap	4/10/23	
9	Monta Flemi	Escrow	FlemFlem Es	2223334444		monta+ff伊p	monta@pap	4/5/23	
10	Geoffrey Mc	Outside Age	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 company	123-123-123	123-123-123	peace6@pap	monta@pap	3/30/23	
13	Peace Willia	Title	new company	123-123-123	123-123-123	peace2@pap	monta@pap	3/30/23	
14	Jack Nicklaut	Attorney	Jack Nicklaur	(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伊	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		(860) 249-78			monta@pap		
21	Leonardo	Buyer		555-555-555			monta@pap		
22	Jack Stewart			585-380-452			hollis@pape		
23	Jules Verne	CEO	UnderSea Inv	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 I

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  $\rightarrow$ 

