

Adding a Contact FAQ

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A contact holds a name, a role, a company, a phone number, a fax number, and an email address, and it lives on the transaction you add it to. Answers to the common questions about who can add contacts, reusing them, and what the fields hold.

Who can add a contact to a transaction?

Anyone with access to the transaction. There's no separate permission for adding contacts — if someone can open the transaction, they can add one.

Do I have to add the same contact to every transaction?

Yes — contacts belong to the transaction they're added to. After the first time, typing the first few characters of the name brings them up as a suggestion, so it's a click rather than a re-type.

Is there a limit to how many contacts I can add?

No. There's no limit on how many contacts you store, or on how many you add to a single transaction.

Does adding someone as a contact email them or give them access to Pipeline?

Neither. Contacts have no access to your Pipeline account, and Pipeline doesn't email them on its own — messages go out only when someone sends one.

Where do I add a buyer's or seller's contact information?

Use [add buyer contact(s)] or [add seller contact(s)] below the name field while adding or editing the transaction. They sit in the Buyer, Seller, Pricing section. Once commissions have been entered and a CDA generated, those details are locked there, so add the person as a contact from the transaction page instead.

A contact's details changed. Should I just add them again?

No — adding them again creates a second entry, and both versions get suggested from then on. Have a master admin update the existing contact so the fix reaches every transaction it's on.

Learn More

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See [Adding a Contact](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
