Adding a Contact

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

Introduction

Half the people on a deal don't work at your brokerage. The escrow officer, the lender, the co-op agent, the attorney, and the buyer and seller themselves all have to be reachable by whoever picks the file up next. Adding them as contacts puts their details on the transaction, where the deal already lives.

A contact is a reference entry, not an account. Adding someone doesn't give them a login, and Pipeline doesn't email them because they're on the list. It records who they are and how to reach them, so anyone who can open the transaction can find them without going back through the person who set the deal up. The details travel with them too, so handing someone's card to a colleague doesn't mean typing it out again.

Nobody has to dig through old emails for a number that was sitting on the file all along. It's also worth saying that the Contacts section isn't only for the professionals on a deal. Your own buyers and sellers belong there, and putting them there is what makes them findable later, when the file is closed and somebody needs to reach them.

How It Works

Contacts live in their own section on every transaction, and each one holds a small set of details you fill in as you go.

Where Contacts Live

Every transaction has a **Contacts** section. Click [+ Add Contact] above the Docs section to add someone. Click [⍰] to show the section or [⍰] to hide it — Pipeline remembers your preference the next time you open a transaction.

What a Contact Holds

A contact takes a role, a name, a company, an email address, a phone number, and a fax number. Role and name are the two you have to fill in.

Every contact you add carries the same short set of details: role, name, company, email, phone, and fax. Two of them are required and the rest are yours to fill in as you get them.

See Contact Fields

Reuse Someone You've Added Before

Contacts belong to each transaction individually, so you add the same escrow officer to each new file — but only the first time is any typing.

Type a few letters and Pipeline offers the people you've already worked with, details and all — so a repeat escrow officer or lender lands on the transaction without retyping a thing.

See Auto-suggested Contacts

Pass a Contact's Details On

From a transaction you can download a contact's vCard, or drag a contact into a message you're composing. Dropped into the recipient field it addresses the email to them; dropped into the message body it pastes their full details in for someone else to use.

Add a Contact

> Add a contact from the transaction they belong to.

> **Who Can Do This**: Anyone with access to the transaction.

To add a contact:

1. Go to the transaction and click [+ Add Contact] above the Docs section.

2. Fill in the **Role** and **Name**, add whatever else you have, then click [Add Contact] to save it to the transaction.

The contact appears in the transaction's Contacts section for everyone who can see that transaction, and Pipeline suggests them the next time you add a contact to a transaction you have access to.

Every contact you add carries the same short set of details: role, name, company, email, phone, and fax. Two of them are required and the rest are yours to fill in as you get them.

See Contact Fields

Edit a Contact

> Change a contact's details on the transaction you're looking at.

> **Who Can Do This**: Anyone with access to the transaction.

To edit a contact:

1. Go to the transaction and hover over the contact, then click [the edit icon].

2. Make your changes to the contact's details.

3. Click [Save Contact].

Your changes apply to this transaction only.

When a contact's email or phone number changes, a master admin can fix it once and push the correction to every transaction they're on.

See Cross-Transaction Contact Updates

Delete a Contact

> Remove a contact from the transaction it was added to.

> **Who Can Do This**: Anyone with access to the transaction.

To delete a contact:

1. Go to the transaction and hover over the contact, then click [X].

2. Click [delete] to confirm.

The contact comes off this transaction. If they still come up as a suggestion elsewhere, it's because they're saved on other transactions too.

Retire an old or misspelled contact so it stops turning up as a suggestion, without touching the transactions it's already on.

See Hidden Contacts

Download a Contact's vCard

> Save a contact's details as a vCard file you can drop into your own address book.

> **Who Can Do This**: Anyone with access to the transaction.

To download a contact's vCard:

1. Go to the transaction and hover over the contact.

2. Click the [vCard] icon.

The vCard downloads to your device. Open it to add the contact to your address book.

Email the People on the Deal

A vCard gets somebody into your own address book. Reaching them about this particular deal happens the other way round, on the transaction itself, where you can drag a contact straight into the message you're writing.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

Adding a Contact FAQ

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. See Adding a Contact FAQ, or Why Can't I Add a Contact? if you're stuck.

Adding a Contact Troubleshooting

Running into a problem? Start here.

- Why Can't I Add a Contact?