Contact Order

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Contacts show up in the order they were added, but you can sort your own view — or set the order your whole office sees.

Introduction

Contacts land on a transaction in whatever order people got round to adding them. The lender turns up before the escrow officer, the processor sits three names away from the person she works for, and a file you didn't open yourself reads like a pile rather than a list.

There are two ways to change that, and the difference between them matters. One is a sort control that rearranges your own view of the list. The other is dragging the contacts into the arrangement you want, which sets the order the whole office sees. One is a preference. The other is a decision on everyone's behalf.

The payoff is a transaction that reads the way your office thinks about a deal: both agents together, title and escrow side by side, the lender next to their processor. It's a small thing right up until you're pulling addresses for a closing email and the people you need are scattered down the column. Worth knowing which lever you're reaching for, since one of them changes what everybody sees.

How It Works

One of these is a personal preference and the other is a shared default, so it's worth knowing which one you're changing.

Your Sort Is Yours Alone

The sort control at the top of the Contacts section shows how the list is ordered — [↕ Order Added] to begin with. Choose a different sort and Pipeline remembers it, on this transaction and every other one you open.

The Order Is Shared, Not Personal

Drag a transaction's contacts into the order you want and that arrangement becomes the office default — everyone sees the lineup your office prefers, rather than whatever sequence the contacts happened to be entered in. It shipped in June 2026 and closes one of the longest-standing requests we've had.

Group People Together

Because the order is yours to set, you can group contacts the way your office reads a file: both sides' agents together, title and escrow side by side, the lender and their processor next to each other.

Sort Your View of Contacts

> Change how the Contacts section is ordered for you.

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

To sort your view of contacts:

1. Go to a transaction and click [↕ Order Added] at the top of the Contacts section.

2. Select the sort you want.

The Contacts section re-orders, and Pipeline remembers your choice the next time you open a transaction. It's your preference — it doesn't change what anyone else sees.

Set the Order Your Office Sees

> Drag a transaction's contacts into the order your office wants to read them in.

> **Who Can Do This**: Master admins and admins.

To set the order your office sees:

1. Go to a transaction and find the contact you want to move in the Contacts section.

2. Drag it up or down to where you want it, then release. Repeat until the list reads the way you want it.

The order you set becomes the shared office default, so everyone working the transaction sees the same lineup.

Contact Order FAQ

Contacts start out in the order they were added, and both you and your office can change that. Answers to the common questions about sorting, custom order, and who sees which. See Contact Order FAQ.