

Cross-Transaction Contact Updates FAQ

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One correction on the Manage Contacts page can reach every transaction a contact appears on. Answers to the common questions about who can do it, what it reaches, and what it leaves alone.

Who can update a contact across all transactions?

Master admins only. It's done from the Manage Contacts page in your admin settings.

An agent fixed a contact on their transaction. Did that fix it everywhere?

No — an edit made inside a transaction applies to that transaction alone. Ask a master admin to make the correction on the Manage Contacts page so it reaches the rest.

Why doesn't the Manage Contacts page show all my contacts?

It finds contacts rather than listing them. The page exists to correct one contact everywhere at once, so it returns results by search. To see every contact together, a master admin can download the All Contacts report.

Can I merge duplicate contacts?

There's no merge button, but updating gets you there. Correct each variation to the same details and they consolidate into a single entry — which is how years of accumulated spellings get cleaned up.

Will the correction update a CDA I already generated?

No. A generated CDA keeps the contact details it was created with, by design, so an intentional entry isn't overwritten. Regenerate it from Manage Commissions to pick up the change.

Learn More

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](#)

Still Have Questions?

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