Cross-Transaction Contact Updates

Last Modified on 09/04/2026 11:07 am EDT

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.

Introduction

A contact belongs to the transaction it was added to. That's what makes contacts quick to add and slow to correct. The same escrow officer across two hundred files is two hundred separate entries, each holding its own copy of an email address that stopped working last week.

Manage Contacts is the account-level view of all of them together. From there you make a correction once and push it to every transaction the contact appears on, instead of file by file. The same pass folds together the variations that piled up over the years, the misspellings and the half-finished duplicates, so one person stops being three.

None of that means your account was set up wrong. Contacts sit on transactions by design, which is exactly what makes them fast to add on a live deal, and the drift that follows is the ordinary cost of it. One thing to know before you start: documents you already generated keep the details they were made with, so a correction changes what happens from here rather than rewriting the record behind you.

How It Works

This is the one place a contact stops being a per-transaction detail and becomes something you can fix everywhere at once.

Search, Don't Browse

Click the [Gear] in the upper-right corner, then [Admin / Settings], and select [Manage Contacts] from the left menu. It doesn't list your contacts, it finds them: search a name and the matching entries come back, including the variations that have piled up over the years.

Consolidate the Variations

Searching a name usually turns up more than one version of the same person. Update each variation to the correct details and years of drift collapse into a single entry.

Documents You Already Produced Keep Their Details

Correcting a contact doesn't rewrite documents that were already generated. A 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.

See Every Contact at Once

Manage Contacts works one search at a time. To see every contact in the account together, a master admin can download the All Contacts report.

Update a Contact Across All Transactions

> Correct a contact once and apply the change everywhere it appears.

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

To update a contact across all transactions:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Manage Contacts] from the left menu.
2. Search by the contact's name, then select it from the results or click [Search].
3. Click the name of the contact you want to update.
4. Click [the edit icon] next to the contact.
5. Make your changes, then click [Update Transactions].

Pipeline updates the contact on every transaction it appears on, and suggests the corrected details from then on.

Find the Duplicates Before You Fix Them

Manage Contacts answers a name you already suspect. It won't show you the spelling nobody thought to search for, and after a few years that's usually where the work is hiding.

Every contact your office has ever added to a transaction, in one spreadsheet you can sort, share, or load into another tool.

See Contact Export

Cross-Transaction Contact Updates FAQ

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. See Cross-Transaction Contact Updates FAQ.