Fix a Contact's Details Everywhere They Appear

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An escrow officer changes firms, a lender gets married, a title company moves domains. Correct them once and the fix lands on every transaction they're on — instead of two hundred.

Introduction

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

Manage Contacts is the way out of that. A master admin searches the contact, makes the correction once, and applies it everywhere: a new last name, a new phone number, a new company. The variations that piled up over the years get folded into one entry in the same pass.

What follows is the whole job, not just the button: seeing how far the contact spread before you touch anything, making the correction, handling what a non-admin can't, retiring the version you don't want anymore, and making sure the corrected details are what your agents get offered from now on.

When to Use This

- A title company or brokerage changed its email domain and every address you have for them bounces.
- Someone changed their last name, and half your files have the old one and half have the new one.
- The same person exists three times over — different spellings, different phone numbers, all of them "right" on some transaction.
- You keep emailing an escrow officer who left the company a year ago, because their name is still the first thing the dropdown offers.
- An agent asked you to fix a contact "everywhere," and you're not sure where everywhere is.

Why This Beats Fixing Them One at a Time

The instinct is to open the transaction you're looking at, correct the contact there, and move on — it's two clicks and the file in front of you is right. The trouble is that it's only that file. The next transaction still carries the old address, so does the one after it, and the correction never finishes; it just follows you around for a year.

Correcting from Manage Contacts inverts that. One edit reaches every transaction the contact appears on, and because Pipeline builds its suggestions out of what's on your transactions, the corrected details are also what gets offered the next time somebody adds that person. You fix the past and the future in the same action.

1. See How Far the Contact Actually Spread

Before you correct anything, get a picture of what you're dealing with. Manage Contacts finds contacts by search rather than listing them, which is perfect once you know the name you're chasing and no help at all when you're trying to find every variation of it. The All Contacts report is the view that shows you everything at once — the four spellings of the same title company, the old domain sitting alongside the new one.

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

> Sorting that spreadsheet by company or by email is the fastest way to spot drift. Anything that looks like the same person twice is something to consolidate in the next step rather than correct twice.

2. Push the Correction to Every Transaction

Now make the fix. Searching the name on Manage Contacts brings back the entries that have accumulated, and updating each one to the correct details is how years of variations collapse into a single contact.

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

> Documents you already generated don't change. A CDA holds the contact details it was created with by design, so correcting the contact now won't rewrite a commission document you produced last month — regenerate it if you need the new details on it.

3. Handle the Corrections You Can't Push

The cross-transaction push is a master admin's tool. Everyone else's edits work exactly as they always have — you can open a contact on a transaction and correct it there, and the change applies to that transaction and nothing else.

So if you're an agent or an admin without master access and a contact is wrong across your files, the fast path isn't to start clicking. Ask your master admin to make the correction from Manage Contacts once. The slow path — opening each affected transaction and editing the contact on it — is still there and still correct, and it's the right call when only two or three files are involved.

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

> Two ways to find every transaction a contact is on. From Manage Contacts, the transaction count beside a contact opens the list of transactions they're listed on. Or search for them directly with Global Search using `contact:` or `contact-company:` — useful when you want to filter the results by status or date before you start working through them. See Global Search.

4. Retire the Version You Don't Want Anymore

Sometimes the old entry shouldn't be corrected — it should stop being an option. The escrow officer who left the firm, the address that was never right, the duplicate you consolidated away from. Hiding takes it out of the suggestions without disturbing the transactions where it's already sitting, so your record of what was true at the time stays intact.

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

> Hide rather than delete. A hidden contact keeps every transaction it's on exactly as it was, which is what you want when a file has to stand up to an audit two years from now.

5. Let the Corrected Contact Take Over the Suggestions

The last piece is the one that keeps the fix from unravelling. Pipeline builds its suggestions out of the contacts already sitting on transactions, so the corrected version starts being offered as soon as it exists on one — and if you hid the old entry in the previous step, it's the only version your agents get.

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

> What each person is offered depends on what they can see. Master admins draw on every contact in the account, admins with permission to view all transactions draw on those, and an agent draws on their own transactions — so a correction reaches an agent's suggestions once it lands on a transaction they work.