

Auto-suggested Contacts FAQ

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

Pipeline builds suggestions from the contacts on transactions you can see, keyed to the role you pick. Answers to the common questions about why lists differ between colleagues, sharing contacts office-wide, and getting rid of an outdated one.

Where do the suggested contacts come from?

From contacts already on transactions you have access to. There's no separate address book to build. Add someone to a transaction once and they're offered to you from then on.

Why can my colleague see a contact I can't?

Because suggestions follow transaction access. Master admins are offered every contact in the account, admins with *View All Transactions* get the contacts on those transactions, and agents get contacts from their own. A contact you've never worked a transaction with won't be offered to you.

Can I load a shared contact list for the whole office?

Not directly — suggestions spread as people work. A contact becomes available to everyone who can see the transaction it sits on, so contacts on transactions the whole office is on will be suggested to the whole office. Some teams lean on that deliberately. If a proper shared directory would change how you run things, tell us at help@paperlesspipeline.com — we'd like to hear it.

Can I search suggestions by name or phone number instead of role?

No — start with the role. Pick or type the **Role** first, then start typing the name and the matching people appear. Searching straight from a name or phone number isn't supported today.

How do I stop an old contact from being suggested?

A master admin can hide it. Hiding takes the contact out of the suggestions while leaving it untouched on the transactions where it's already used — which is what you want for an escrow officer who changed firms or an address that's gone stale.

Does hiding a contact remove it from past transactions?

No. The transactions keep the contact exactly as it was. Hiding only affects what's offered going forward, so your history stays intact.

Are these suggestions the same as my browser's autofill?

No, and they're easy to confuse. Chrome and Firefox offer their own saved entries in form fields, which look similar

and aren't coming from Pipeline. If a stubborn entry doesn't appear anywhere in your account, it's the browser — clear it from your browser's autofill settings.

Learn More

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](#)

Still Have Questions?

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