Auto-suggested Contacts

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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.

Introduction

You work with the same escrow officers, lenders, inspectors and attorneys over and over. Pipeline notices. Every contact anyone adds to a transaction becomes a suggestion, so the second time around you type a few letters, pick the person out of the list, and their company, email, phone and fax come along with them.

There's nothing to switch on. The list builds itself out of the work already in your account, which is also why two people looking at the same field see different suggestions. Pipeline only offers you people from transactions you can reach, so an agent sees the people from their own deals and a coordinator sees a much longer list. That's the design rather than a gap in it.

The payoff is that a repeat contact goes onto a transaction without anyone retyping a thing, and without the typos retyping brings. The flip side is that the list remembers everything, including the escrow officer who changed firms three years ago. When a stale suggestion keeps coming back, it's still sitting on a transaction somewhere, and there's a way to retire it that leaves those files alone.

How It Works

Suggestions are a read of your own transaction history rather than a shared address book, which explains most of what people notice about them.

A Contact Shows Up After Its First Use

Nothing shows up until you've used it once. Add a contact to a transaction and save, and Pipeline offers that person from then on. The same is true of the role they carry.

You Start From the Role

Suggestions are keyed to the role. Pick or type the **Role** first — *Escrow Officer*, *Lender* — and the names Pipeline offers are the people you've used in that role before. There's no way to go the other direction and search suggestions by name or phone number.

Pick a Suggestion and the Rest Fills In

Select someone from the list and their saved company, email, phone and fax drop straight into the form. You can edit any of it before saving — what you keep is what goes on this transaction.

What You See Depends on What You Can See

Suggestions follow transaction access. A master admin sees every contact in the account. An admin with *View All Transactions* sees contacts from the transactions that permission covers. An agent sees contacts from their own transactions. Nobody can hand-load a contact into everyone's list — it happens as people work.

The List Is Filtered, Not Endless

The dropdown shows a slice, not everything, and lists roles alphabetically. If an account has collected a dozen similar roles, the one you want can sit below the cut — keep typing and the list narrows to it.

Clean Up What Gets Suggested

Because the list is built from real contacts, tidying it means tidying them. A master admin can hide an outdated contact so it stops being offered while staying on the transactions it's already on, and can rename or hide a role from *Manage Contact Roles*.

Reuse a Contact You've Added Before

Add a repeat contact by typing a few letters and picking them from the suggestions — their saved details come with them.

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

To reuse a contact you've added before:

1. Go to a transaction.
2. Click [+ Add Contact] above the *Docs* section.
3. Choose the **Role** you need from the suggestions, or type it.
4. Start typing the contact's name and select them from the suggested contacts.
5. Adjust any details that have changed, then click [Add Contact].

Pipeline adds the contact to this transaction with the details you saved, and suggests that version next time.

Frequently Asked Questions

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.