Clean Up Your Contact Roles List

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

Title, Title Co, Title Company and Title Co. are one job wearing four hats. Fold them back into a single role and your dropdown, your sorting, and your message templates all start agreeing with each other.

Introduction

Contact Roles are free text on purpose. Anyone working a transaction types the role they need and it exists from then on — which is what makes adding a contact quick, and what guarantees that a few years of real use leaves you with a dropdown holding every spelling anybody ever reached for.

That sprawl is worth fixing, and not only because it looks untidy. A role name is what your Contacts list sorts by, what an autofill tag matches against, and what decides which contact ends up on a generated document. When one job has four names, all three of those quietly go wrong.

This is the cleanup, start to finish: agreeing on the set you actually want, merging the variations into it, naming both sides on a dual-sided deal, re-checking the tags a rename affects, and keeping the list from drifting straight back.

When to Use This

- Your role dropdown has grown long enough that agents scroll past the right option and type a new one.
- The same job appears three or four times with different spellings, and nobody's sure which one is the "real" one.
- You're sorting the Contacts list by role and the same people land in different places on different transactions.
- An autofill tag in a message template comes back with an error or an empty space, and the role in the tag looks right to you.
- You're standardizing an account you inherited and want one clear set of roles before you train anyone on it.

Why This Beats Locking the List Down

The instinct is to take the pen away — restrict role creation to admins, publish an approved list, and let nobody type anything else. That isn't how Roles work, and asking for it is the most common version of this request. Anyone who can add a contact can type a role, and there's no setting that changes it.

Tending beats locking anyway. A market that needs a *Conveyancer* or a *1031 Exchange Provider* gets one the day it needs it, without a ticket and without you. What you own is the other end: periodically merging the variations back into the set you want and hiding the ones nobody should be picking. The list stays open, and it stays clean, because you clean it — not because it was ever sealed.

1. Decide the Set You Actually Want

Before you merge anything, write down the roles your office is keeping. This is the only part of the job that isn't in Pipeline, and it's the part that makes the rest quick — every variation you find later gets folded into a name you've already chosen, instead of a judgment call made forty times.

A few things worth settling while you're at it:

1. **One name per job.** Pick *Title Company* or *Title Co*, not both, and write down which.
2. **The jobs, not the people.** Roles describe what someone does on the deal, so*Escrow Officer* holds up where *Sarah's Assistant* doesn't.
3. **Spelled out, not abbreviated.** Abbreviations are where variations breed, and a role you have to type in full is a role people pick from the dropdown instead.
4. **Sides where you need them.** If you run dual-sided deals, decide the side convention now — step 3 is about exactly that.

Open the *Manage Contact Roles* page alongside your list. Each role shows how many times it's been used and when it was last added, so you can tell a role your office genuinely runs on from one somebody typed in 2019 and never used again.

2. Merge the Variations and Hide the Rest

Now do the consolidation. Renaming a role rewrites it on every contact carrying it, and pointing two variations at the same name merges them — so *Title*, *Title Co* and *Title Co.* become the one role you chose in step 1. Anything left over that shouldn't be picked again gets hidden rather than merged.

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

> If you're staring at a decade of drift and would rather not work through it yourself, send us the list of what you want merged into what and ask — we'd rather do a consolidation with you than have you do forty renames alone. Email help@paperlesspipeline.com.

> Role wording reaches further than the dropdown. On a generated CDA, Pipeline picks the contact whose role comes first alphabetically among roles starting with **Escrow** — so an *Escrow Assistant* gets chosen ahead of your *Escrow Officer* until that role is renamed to something that doesn't start the same way.

3. Name Both Sides on a Dual-Sided Deal

One standard set works right up until a transaction has two of the same job. When you hold both sides, there's a buyer's escrow officer and a seller's escrow officer on the same file, and a single *Escrow Officer* role can only be one of them.

The fix is in the name. Give each side its own role — *Escrow Officer - BUYER* and *Escrow Officer - SELLER* — and both people fit on the transaction with no ambiguity about which is which. The same shape works anywhere a job doubles up: lenders, attorneys, inspectors.

Putting the side at the front instead — *Buyer Lender*, *Seller Lender* — buys you something extra, because roles sort alphabetically. Every buyer-side contact then groups together when you sort the Contacts list by role, which is as close as Pipeline gets to splitting a transaction's contacts by side.

Contacts show up in the order they were added, but you can sort your own view — or set the order your whole office sees.

See [Contact Order]

> Pick one convention and write it into your standard set from step 1. A side prefix on some roles and a suffix on others reintroduces exactly the sprawl you just cleaned up.

4. Update the Autofill Tags That Point at a Role

This is the step that catches people out. An advanced contact autofill tag finds its contact by role — `{{contacts:escrow:email}}` looks for a contact whose role matches *escrow*. Rename that role and the tag is now pointing at a name that no longer exists on your transactions, so a template that worked last week comes back with an error or a blank where the email should be.

So walk your message templates after a rename and update any tag naming a role you changed. It's a small job right after the cleanup and an unpleasant one to discover mid-send.

Autofill Tags let Pipeline do the typing. Drop a tag into a message template and the transaction's own details fill themselves in every time you send.

See [Autofill Tags]

> The match has to be exact. If your contacts are entered as *Escrow Agent*, a tag written for *Escrow Officer* has nothing to find — which is worth knowing before you go looking for a bug that isn't there.

5. Keep the List From Drifting Again

Roles will keep growing, because the thing that lets an agent type *Conveyancer* at 9pm is the same thing that gives you *Title Co.* back in a year. There's no setting to prevent it, so the answer is a habit rather than a control.

Two things hold the line. Tell your agents the convention — the set you chose, and the side rule if you use one — because most variations are somebody guessing, not somebody disagreeing. And put the cleanup on a schedule you'll actually keep, once or twice a year: open *Manage Contact Roles*, sort by how recently each role was used, and merge or hide whatever appeared since last time. It's a ten-minute pass once the standard set exists, and it's the difference between a list you maintain and a list you rescue.

> New roles are only suggested to people who can see the transactions they're used on, so a role one agent invents doesn't immediately spread across the office. That's a little grace on the drift — it also means a role can be quietly wrong in one corner of the account for a while before you notice it.