Contact Fields FAQ

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A Pipeline contact holds a role, a name, a company, an email address, a phone number, and a fax number — no more, no less. Answers to the common questions about required fields, second email addresses, addresses, and rejected emails.

Which fields are required on a contact?

Role and Name. Everything else is optional. A contact with just a name and a phone number saves fine — an email address is never required.

Can one contact have two email addresses?

No — add them as two contacts. Each contact record holds a single email address. Adding the same person twice with different addresses is the supported way to reach both, and it keeps drag-and-drop emailing predictable.

Can I add my own custom fields to a contact?

Not today. The six fields are the whole set. If you need somewhere to put extra detail, **Company** and **Fax** are the two that will take it. If custom contact fields would change how you work, tell us at help@paperlesspipeline.com.

Where do I put a contact's address?

In the Company field. It holds the company name and the address together, and both come out in the Company column of the account-wide contacts spreadsheet. If you want them in separate columns afterward, split that column in your spreadsheet app.

Why is Pipeline saying a valid email address is invalid?

Almost always a stray space. A space before or after the address is the usual culprit — delete it and try again. Otherwise check that the address has an @ and a full domain.

Can I put two buyers or two sellers on one contact?

No, but Pipeline will split them for you. On the *Add* or *Edit Transaction* page, click [add buyer/seller contact(s)] and enter their details separated by the word *and* — for example two phone numbers as *555-1234 and 555-5678*. When you save, Pipeline creates a separate contact for each. Anything you enter once applies to both.

Does the Buyer or Seller name on the transaction sync with the contact?

It creates the contact, but it doesn't keep syncing. Entering a buyer or seller on the *Add* or *Edit Transaction* page can create a contact for them automatically, so you're not typing it twice. After that the two are separate — editing one doesn't rewrite the other.

What's in the Fax field if we don't fax?

Whatever's useful to you. It's a plain text field — a second phone number, an extension, a short note. Master admins see it as the *Other* column in *Manage Contacts*, which is where the name comes from.

Learn More

Every contact you add carries the same short set of details: role, name, company, email, phone, and fax. Two of them are required and the rest are yours to fill in as you get them.

See Contact Fields

Still Have Questions?

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