Contact Fields

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

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.

Introduction

A contact in Pipeline is a small record on purpose: enough to know who somebody is, reach them, and hand their details to someone else. That's the whole scope of it.

The same short set of fields travels with a contact everywhere it goes, and that's what makes the record dependable. What you enter on the transaction is what comes back out on a coversheet, in a vCard, and in the account-wide contacts spreadsheet. The set is fixed rather than configurable, so a contact means the same thing in every office and to everyone reading one.

It's worth knowing the shape before you start. A contact holds one person rather than a pair or a team, so a second buyer, or a lender's processor, is a second contact instead of an extra line on the first. Only a couple of the fields are needed to save it and the rest you add as you get them, which keeps a contact quick to enter and hard to misread later.

How It Works

Pipeline stores contacts per transaction rather than in a central address book, so the field set is deliberately small and identical for every contact you add.

Fill In Role and Name

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

One Person Per Contact

Each contact holds one set of details — one name, one email address, one phone number. Two people with different information are two contacts, which is what keeps drag-and-drop emailing and the contacts spreadsheet unambiguous.

The Fields Are Fixed

You can't add a custom field to a contact. In practice the two roomiest fields absorb the extras: property or mailing addresses go in **Company**, and anything else you want on hand goes in **Fax**.

Every Field Comes Back Out

Whatever you put in is what a master admin gets in the account-wide contacts spreadsheet — name, role, company, phone, fax, and email, plus who added the contact and when. Filling in the role and email consistently is what makes that download useful later.

What Each Field Holds

- **Role** — required. What this person does on the transaction:*Buyer*, *Escrow Officer*, *Attorney*. Free text, and it drives how Pipeline treats the contact elsewhere.
- **Name** — required. The contact's name, shown in bold beside their role on the transaction.
- **Company** — optional. The company they work for. It's also where an address belongs; the field holds both, and they come out together in the spreadsheet's Company column.
- **Email** — optional. One address per contact. It's what makes the contact draggable into an email, so it's worth filling in.
- **Phone** — optional. One number per contact.
- **Fax** — optional. A second number, shown as *Other* in the master admin's *Manage Contacts* list. Offices without a fax often use it as a catch-all for a note or a second number.

See Every Contact Your Office Has Ever Entered

Role and Name are the only two Pipeline makes you fill in. The rest are worth filling anyway, because a blank column is still a column on the day somebody asks for the whole list.

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

Contact Fields FAQ

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.

See Contact Fields FAQ