Contact Roles FAQ

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Contact Roles are free text — anyone working a transaction can type a new one, and master admins tidy the list from *Manage Contact Roles*. Answers to the common questions about creating roles, merging duplicates, and controlling what gets suggested.

Can I create my own contact roles?

Yes — just type the role you need. The **Role** field takes free text, so if the role you want isn't offered, type it and keep going. It's suggested to you from then on.

Is there a fixed list of roles an admin has to set up first?

No. There's no locked, pre-approved list of roles. The suggestions you see are the roles already used on transactions you have access to.

Can agents add roles, or only admins?

Anyone who can work the transaction can add a role. Renaming, consolidating, and hiding roles account-wide is a master admin action, done from *Manage Contact Roles*.

Can I stop agents from creating new roles?

Not today. Role entry is open to anyone with transaction access, which is what keeps it quick. What you can do is clean up afterward: rename the strays into your standard role, then hide the ones you don't want offered. If a locked role list would help your office, tell us at help@paperlesspipeline.com — it shapes what we build next.

How do I clean up duplicate roles like Title, Title Co, and Title Company?

Consolidate them from *Manage Contact Roles*. Search the role, check every variation you want to combine, then click [Bulk] → [Rename] and type the one you're keeping. They all become that role.

Does renaming a role change past transactions?

Yes — that's the point. A rename rewrites the role on every contact carrying it, which is why the button names the number first: **Update 6 Occurrences**. Check that count before you commit.

What happens if I rename a role to one that already exists?

They merge. Two roles renamed to the same text collapse into a single entry, which is exactly how consolidating variants works.

Can I delete a contact role?

No — hide it instead. Hiding takes the role out of the suggestions so nobody picks it again, while leaving the transactions that already use it untouched. Since a role only exists because contacts carry it, hiding is the clean way to retire one without rewriting history.

Do the roles I create show up for everyone in my office?

Only for people who can see the transaction it was used on. Suggestions follow transaction access — master admins see everything, admins with *View All Transactions* see those transactions' roles, and agents see roles from their own transactions.

Does it matter what I name a role?

More than you'd think. When you start a New Offer, Pipeline reads the role text to decide which contacts are buyer-side — roles containing **Buyer**, **Lender**, **Lending**, **Escrow** or **Title** are left off the new transaction so you can enter fresh ones. Consistent names keep that tidy.

Learn More

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

Still Have Questions?

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