Contact Roles

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

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.

Introduction

Open a transaction you didn't create and the Contacts section is a column of names. What makes it readable is the word sitting beside each one, saying what that person does on the deal. That word is the contact's role.

Roles aren't a list somebody sets up in advance. Whoever adds a contact types what they need, and Pipeline offers it back the next time anyone reaches for it. That's what keeps adding a contact quick. It's also why the wording matters more than it looks, because a role isn't only a label: it's what your Contacts list sorts by, and what an autofill tag matches when it pulls somebody's name onto a document.

The payoff is a transaction anyone can read without asking who's who. The cost, after a few years of everyone typing freely, is a dropdown holding every variation anybody ever reached for. That's ordinary rather than a sign something went wrong, and it's fixable. Variations of one job can be merged back into a single role across every transaction that uses them, without anyone reopening files one at a time.

How It Works

Roles are typed, not configured — they build up from real transactions, and you tidy them from one page.

Roles Are Free Text

The **Role** field on a contact takes whatever you type. There's no locked list and no admin approval step, so if your market needs a *Conveyancer*, a *1031 Exchange Provider*, or a *Referrer*, you type it and it exists.

A Role Becomes a Suggestion After Its First Use

The first time you use a role it won't be in the dropdown, because Pipeline builds the dropdown from roles already on transactions. Type it once, save the contact, and Pipeline offers it from then on. Suggested roles run alphabetically.

Roles Live on Each Contact, Not in a Master List

As the *Manage Contact Roles* page puts it: contacts and the roles assigned to them exist independently on each transaction. A role isn't a record you edit once — it's a string repeated across every contact who carries it, which is exactly why renaming one is an account-wide action rather than a quick edit.

Occurrences Tell You How Big a Change Is

Every role on the *Manage Contact Roles* page shows an **Occurrences** count and a **Last Added** date, and the rename button names the number out loud — **Update 6 Occurrences**. So you always know how much of your account a rename touches before you commit to it, and you can spot the stale variants by their dates.

Role Wording Drives Real Behavior

Role names aren't only for reading. When you start a New Offer on a transaction, Pipeline decides which contacts are buyer-side by looking at the role text. A role containing **Buyer**, **Lender**, **Lending**, **Escrow** or **Title** counts as buyer-side and stays behind, so the new offer starts clean. Consistent role names are what keep that working the way you'd expect.

Add a Contact Role

> Need a role that isn't on the list yet? Type it into the Role field while adding a contact and it's available from then on.

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

To add a contact role:

1. Go to a transaction.
2. Click [+ Add Contact] above the *Docs* section.
3. Type the role you want into the **Role** field instead of picking one from the suggestions.
4. Add the rest of the contact's details, then click [Add Contact].

Pipeline saves the new role with that contact and offers it as a suggestion the next time you add one.

Rename a Contact Role

> Fix a misspelled or outdated role once and Pipeline updates it on every contact carrying it.

> **Who Can Do This**: Master admins.

To rename a contact role:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Manage Contact Roles] from the left menu.

3. Type the role into the search box and pick it from the suggestions, or click [Search].
4. Click [the edit icon] to the right of the role you want to rename.
5. Type the corrected role, then click [Update N Occurrences].

Pipeline rewrites the role everywhere it's used. If you rename it to a role that already exists, the two merge into one.

Consolidate Duplicate Contact Roles

> Collapse years of *Title*, *Title Co* and *Title Company* into a single role in one pass.

> **Who Can Do This**: Master admins.

To consolidate duplicate contact roles:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Manage Contact Roles] from the left menu.
3. Search for the role, then check the box beside each variation you want to combine.
4. Click [Bulk], then [Rename].
5. Type the role you want to keep, then click [Update N Occurrences].

Every selected variation becomes the role you typed, and they merge into a single entry on the list.

Hide a Contact Role

> Take a role out of the suggestions without touching the transactions that already use it.

> **Who Can Do This**: Master admins.

To hide a contact role:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Select [Manage Contact Roles] from the left menu.

3. Type the role into the search box and pick it from the suggestions, or click [Search].

4. Click [the hide icon] to the right of the role you want to hide.

The role stops appearing in the suggested roles dropdown when someone adds a contact. It stays exactly as it is on the transactions where it's already used.

Pull a Contact's Details Into a Message

A tidy role list pays off somewhere most people don't look for it. An advanced tag can reach the person holding a particular role on the transaction, which only works if that role is spelled the same way on every file.

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

Contact Roles FAQ

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.

See Contact Roles FAQ