

Contact Export FAQ

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The contact export is an account-wide spreadsheet of everyone added to a transaction, run by master admins. Answers to the common questions about who can run it, what's in it, and what it leaves out.

Who can export contacts?

Master admins. The export reaches every transaction in the account, so it isn't offered to agents or to admins below that level.

Can an agent export their own contacts?

Not as a spreadsheet. An agent can download or email a transaction's Coversheet, which lists that transaction's contacts on its last page, or ask an admin to run the account-wide export and share the part they need.

What's in the export?

One row per contact. Each row carries the name, role, company, phone, and email that were entered on the transaction.

Can I export the contacts for just one office?

No. The export is company-wide. Download it, then filter by location in your spreadsheet app.

Can I export only one type of contact, like lenders or escrow closers?

No. The export brings everyone, and the file includes a Role column, so sort or filter on that once it's open.

Are outside co-op agents included?

Only if they were added as a Contact. An agent entered solely as a co-op agent on the Edit Transaction page isn't a Contact, so they won't appear. Adding outside agents both ways keeps them in both places.

Does the export show which transactions a contact is on?

No. A contact can be on many transactions, so transaction fields aren't part of this report. For transaction detail, download a transaction spreadsheet instead.

Can I edit the file and upload it back to update contacts?

No. There's no contact import, so bulk changes made in the spreadsheet don't come back into Pipeline. Contacts are edited on the transactions they're attached to.

Learn More

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](#)

Still Have Questions?

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