Contact Export

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Every contact your office has ever added to a transaction, in one spreadsheet you can sort, share, or load into another tool.

Introduction

Pipeline keeps contacts where the work is, on the transactions they belong to. That's the right place for them while a deal is live, and it's the wrong shape entirely on the day someone asks for the whole list. No single screen shows every buyer, seller, lender and title rep the office has worked with.

The contact export is that list. It pulls every contact anyone has added to any transaction in the account into one spreadsheet, each with the role they played and the details recorded for them, so something that only ever existed one deal at a time comes out as a file you can sort. It arrives account-wide rather than per agent, which is what makes it a single source for the whole office and what means the narrowing happens after the download rather than before it.

Your office's contact history arrives in a form other tools can read, whether that's a mailing list, a review of who you actually send business to, or a load into the system you keep alongside Pipeline. It travels one way. Editing the spreadsheet changes the spreadsheet, and the contacts on your transactions stay as they are.

How It Works

One click, one file, everything the account has.

What's in the File

A row for each contact, carrying the name, role, company, phone, and email that were entered on the transaction.

Who Can Run It

Master admins. The export reaches across every transaction in the account, so it's deliberately held at that level rather than offered to each agent.

It Comes Out Account-wide

The export covers the whole company. There's no way to narrow it to one location or one contact role before it downloads, so sort and filter in your spreadsheet app afterward.

Only People Added as Contacts

An outside agent entered as a co-op agent on the Edit Transaction page isn't a Contact, so they don't appear here unless someone also added them as one. Transaction fields aren't on the report either, since a single contact can sit on many transactions at once.

It Only Goes One Way

The export is a copy to take away, not a working file. You can't edit the spreadsheet and load it back to update contacts in bulk.

Export All Contacts as a Spreadsheet

Pull every contact across every transaction in the account into a single spreadsheet.

Who Can Do This: Master admins.

To export all contacts as a spreadsheet:

1. Click [Transactions] from the top menu.
2. In the **Downloads** section of the left menu, click [All Contacts].

The spreadsheet downloads to your computer. Sort or filter it there to get to the list you're after.

Make Sure Everyone Lands in the File

The export reads Contacts and only Contacts. Someone recorded another way — an outside agent typed into the co-op fields on the transaction, say — comes out missing from a list you'd swear they belonged on. Adding them as a Contact as well is what puts them in every export from that point on.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

Contact Export FAQ

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. See Contact Export FAQ.