Pull Your Client List Out for a Mailing

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Your buyers and sellers are already in Pipeline, spread across every deal you've closed. Two downloads gather them into one list a mailing tool can read.

Introduction

A holiday card, a market update, a just-listed postcard. The list you want to send it to has been building itself inside your transactions for years, one buyer and one seller at a time. There's no address book page that shows it to you all at once, so getting it out is a download rather than a screen you visit.

Two downloads can do it, and they answer different questions. The *All Contacts* export hands you everyone the office has ever added, deduped, with each person's role sitting in a column you can filter. A transaction spreadsheet hands you a slice you shaped first: one agent's clients, last year's closings, one office.

Both depend on the same thing, which is worth checking before you download anything. Pipeline holds a client's email address and phone number only if somebody added that client as a Contact. A name typed into the **Buyer Name** field is just a name.

When to Use This

- You're sending a card, a newsletter, or a market update to every client you've closed with.
- You're loading past clients into Constant Contact, another email marketing tool, or your CRM and need them in a spreadsheet.
- You want just the buyers, or just the sellers, or every title company you've worked with, rather than the whole list.
- You want one agent's clients instead of the entire office's.
- You downloaded a spreadsheet for a mailing and the email and phone columns came back empty.

1. Check That Your Clients Are Actually Contacts

This is the step that decides whether the rest of it works. Open two or three of the transactions you plan to mail from and look at the Contacts area. If your buyers and sellers are sitting there with an email address next to them, you're set. If the only place their name appears is the **Buyer Name** or **Seller Name** field, then the name is all Pipeline has, and the name is all any download will carry.

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

> Going forward, catch it at the start. The **add contact(s)** link sits right under the **Buyer Name** and **Seller Name** fields when you add a transaction, so the details land on the file while you have them in front of you rather than a year later when you want to mail somebody.

2. Decide Whether You Want Everyone or a Slice

The two downloads aren't ranked. They're shaped differently, and the shape of your mailing picks one.

- **Everyone the office has ever added** — the *All Contacts* export. One click, no search first, every contact on every transaction in the account, each with their role. This is the one for a whole-database mailing.
- **A slice you define** — a transaction spreadsheet. Search the Transactions page down to the deals you mean, then download that list with its contact columns. This is the one for a single agent, a date range, or one location.

You can also run both and cross-reference them, which is what offices do when they want the contact detail from one and the transaction detail from the other. Pipeline has no single report that combines them.

3. Download Every Contact the Office Has

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

> The file arrives deduped, which matters more for a mailing than it sounds. A client who bought with you in 2019 and sold with you in 2024 is on two transactions and one row, so nobody gets two envelopes.

4. Or Scope It First, Then Download the Transactions

When the mailing is narrower than the whole account, build the list on the Transactions page before you download anything. Global Search by **agent:** pulls one agent's deals from any status, and *More Search Options* layers on the close-date range, side, or location you're mailing about.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

> Choose **Include all transaction columns** at the download, or the contact detail won't be in the file. Once it's open, the buyer and seller names sit together around columns P to S, and their phone numbers and email addresses land much further right, around columns AJ to AQ.

5. Filter Down to the People You're Mailing

Neither download narrows itself before it lands, so the last shaping happens in Excel, Google Sheets, or whatever you open it in. On an *All Contacts* file the **Role** column is what you work from, and it's the column that turns one export into a buyer mailing, a seller mailing, or a list of every title company you've closed with.

To cut an All Contacts export down to one role:

1. Open the downloaded file in your spreadsheet app.
2. Turn on filtering across the header row.
3. Filter the **Role** column to the role you're mailing, such as Buyer, Seller, Lender, or your own title company role.
4. Copy the rows that remain into a new sheet, so the original stays whole.

Office isn't a filter here, so if you only want one location's clients, that's a hand cut in the spreadsheet or a scoped transaction download instead. And before the file leaves your desk, delete the columns your mailing tool doesn't need. What you send an email platform should be names and addresses, not every field Pipeline holds about a deal.