Find Out Which Lenders and Title Companies You Actually Use

Last Modified on 09/04/2026 11:14 am EDT

Pipeline has no vendor report. It does have a search that answers the question one vendor at a time, and a way to make that search repeatable.

Introduction

The question sounds like a report and isn't one. Which lenders are we actually sending business to, how much of it went to that title company, which closing attorney did the office use most last year. There's no screen in Pipeline that lists your vendors with a count beside each one, and no filter that groups transactions by who closed them.

What there is: a contact record on each transaction, and a search that reaches every transaction where a given contact appears. Run that search per vendor and read the count at the top, and you have the numbers. It's one search per name rather than one report for all of them, which is the shape of the whole job and the thing worth knowing before you start.

It also only reaches as far as your contacts do. A lender nobody added to the file is a lender this can't count.

When to Use This

- You're deciding which lenders or title companies stay on your preferred list and want the numbers behind it.
- A lender asked how much business your office has sent them this year.
- You want every transaction one escrow company handled, in a date range.
- You looked on the *Reports* page for a lender or title report and there isn't one.
- Your broker wants to know which closing attorneys the office is using and how often.

Why This Runs Vendor by Vendor

Most people arrive expecting the opposite shape: one report, every vendor listed down the left, a count beside each. That report would be the right answer and it doesn't exist. There's no filter by contact role either, so you can't ask Pipeline to show you all the lenders and let it group them.

What Pipeline is good at is the other direction: name a contact and it will find every transaction that contact touched, instantly, across every status and every year. So the work turns into a list of names you keep and a search you run against each one. That's slower to set up and it gives you a number you can trust, because you can see exactly which transactions produced it.

> Offices running the Commission Module get a partial head start on title and escrow specifically. The title or escrow company recorded on a CDA comes through as a column on the closed-business report, so for closed commission deals you can read it off rather than search for it. It reaches only the transactions that went through a CDA, so it narrows the job rather than replacing it. See Commission & Closings.

1. Put the Vendor on the Transaction as a Contact

Everything downstream depends on this. Global Search finds what's recorded, so a title company that only lives in somebody's email signature is invisible, no matter how many of your deals they closed. Add each vendor to the transaction as a Contact, with a role that says what they did.

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

> Roles are worth agreeing on across the office before you rely on the counts, since a role you type once is offered back to everyone afterward. If half the office files them as *Lender* and half as *Loan Officer*, the export you filter later reads as two groups. See Contact Roles.

2. Search One Vendor at a Time

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search

> Two fields do the work here. Use **contact:** for an individual, by name or email address, when you're measuring a particular loan officer or escrow officer. Use **contact-company:** when you're measuring the firm and don't care which of their people handled it.

3. Handle the Name Variants Before You Trust the Count

Pipeline matches the characters you type, wherever they appear inside the field, which cuts both ways and is the main thing that makes a vendor count wrong.

It works for you on partial names. Searching **contact-company:** for *First American* catches *First American Title*, *First American Title Insurance Company*, and every other version somebody typed, all in one search. It works against you on abbreviations, because *FATCO* shares no characters with *First American* and comes back as its own separate set.

So before you write a number down, search the company the way your office actually types it, then search the abbreviation, and add the two. A count is only as complete as the spellings you thought to look for.

4. Narrow to the Period You're Measuring

A raw vendor search reaches every transaction ever, which is the right answer for *have we ever used them* and the wrong one for *how much this year*. Once the results are on the Transactions page, layer the period on top: a closedate range, a status, a side if you only want the buying half.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

> The result count sits at the top of the list, and for most of these questions the count *is* the answer. You don't have to download anything to find out that one lender did nine of your closings and another did two.

5. Save It So Next Quarter Is a Click

You'll be asked this again. Save each vendor's search as a shortcut and the comparison stops being a project — click through your saved list, read the counts, done.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

> When you need the deals themselves rather than the count, download the result. SeeTransaction Spreadsheet Downloads.