

Why Is the Wrong Contact on My AI-Created Transaction?

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Pipeline filled the transaction, but one of the people on it isn't who you expected — a duplicate turned up, the wrong existing contact got attached, or an email address is off. Here's why, and how to set it right before you save.

The Wrong Person Is Attached, or a Duplicate Was Created

Pipeline matches each person in the document to your contacts by email address first, because an email is the surest identifier. When the document doesn't carry an email, it falls back to matching by name — and a common or close name can land on the wrong existing contact, or read as somebody new and get added when a match already existed.

Fix it on the review screen before you save. If the wrong person is attached, remove that contact and add the right one in their place. If a duplicate was created, replace the new entry with your existing contact. To make future documents match cleanly, keep an email address on the contacts you reuse — that's what Pipeline matches on most reliably.

An Email Address Is Wrong or on the Wrong Person

Contracts often list several people close together, each with an email — the agent, the client, the lender. When the document's layout puts them near each other, an address can be read onto the wrong party, or read imperfectly.

Check every email address on the review screen against the document, and correct any that are off. This one is worth the extra few seconds: a wrong address on a transaction means the messages you send from it bounce or reach the wrong person, and that surfaces days later rather than now.

Contact Details Came Through Bunched Together

Where a document runs a contact's details together in one block — an escrow office's name, address, and phone on a single line — they can come through as one value rather than split across separate fields.

Separate them by hand on the review screen. If it's happening consistently on the same form your office uses, send it to us, because that's a pattern we can improve.

Still Stuck?

If contacts keep coming through wrong on the same kind of document, send us the transaction name, the source document, and which people came through wrong. We use it to sharpen the matching.

Learn More

Upload a signed contract and a filled-in transaction comes back — *AI Create* does the typing, so you review what Pipeline pulled, add what's missing, and save.

See [Pipeline AI Create](#)

Still Have Questions?

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