Clear Out Transactions Past Your Retention Window

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Your state says seven years and you have fourteen. Before you delete anything, it's worth knowing what deletion actually buys you — and what it costs, because it can't be undone.

Introduction

This comes up every time an office reaches a milestone birthday: you've satisfied the retention rule for the oldest years, and the instinct is to clear them out the way you'd clear a storeroom.

Pipeline isn't a storeroom, and our honest first answer is usually *don't*. Old transactions cost you nothing to keep: they don't count against your plan, they don't slow anything down, and every one of them is evidence you might want on a day you can't predict. Most offices keep everything online well past the minimum for exactly that reason.

But sometimes the answer really is deletion. A policy requires it, or you've been directed to run a purge. If that's where you are, it's a Tech Team job driven by a single date rule, and there are two things to get right before it runs.

When to Use This

- Your retention window has passed on the oldest years and someone has asked whether you can delete them.
- Company policy or a legal directive requires you to destroy records after a set period.
- Your Transactions list is unwieldy and years of closed deals are in the way.
- You imported a batch with bad data and want to clear it out and start again.
- You assumed deleting old transactions would free up room on your plan.

Why This Beats Deleting to Tidy Up

Most people who ask about deleting thousands of old transactions don't actually want them destroyed — they want them out of the way. Those are very different requests, and only one of them is reversible.

A transaction moved into an inactive status disappears from the active list, stops cluttering searches, and is still there in full the day an attorney asks about it. A deleted transaction takes its documents, checklists, emails, contacts, and activity history with it, permanently, and nobody can bring it back — not you, not us. If tidiness is the goal, the status route gets you everything you wanted at no cost and no risk.

1. Start With Whether You Should

Two questions settle it for most offices. Is anything forcing your hand — a policy, a directive, a regulator? And is there any scenario, however unlikely, in which someone asks you for one of these files?

If nothing is forcing it and there's any chance of the second, keeping them is the cheaper decision. Your data stays available for as long as your account is active, nothing is purged on a schedule, and old transactions don't consume anything you're paying for.

How long does Pipeline keep your data? Here's what stays, what's recoverable, and for how long.

See Data Retention

2. Move Them Off the Active List Instead

If the real complaint is that fourteen years of closed deals are in everybody's way, this is the step that fixes it — and for a lot of offices, this is where the job ends.

Statuses in an inactive category take a transaction off the active list without touching it. It stays searchable, stays reportable, keeps its documents and its history, and stops competing for attention with the deals your team is actually working.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

> Working through a backlog of stale deals that were never closed out properly?Keep Your Active Transactions List Clean walks that job end to end.

3. Save Anything You Need Offline First

If you're going ahead, this step is not optional, and it's the one people regret skipping.

A bulk deletion runs on a date rule. It takes everything that matches, and it cannot be told to skip particular transactions — there's no exception list. So anything inside that date range that you want to keep has to exist somewhere outside Pipeline before we run it.

Monthly backups are the practical way to do that: they cover the same years in a handful of ZIP files rather than hundreds of individual downloads.

A month's backup is downloadable for 30 days, and then it's gone from the page. The months you missed aren't lost — our Tech Team can build them again, and this is how to ask.

See Order Backups for Months You Never Downloaded

> Open the archives before the deletion is scheduled, not after. A backup that didn't finish downloading looks fine in a folder and is empty inside — and once the transactions are deleted, there is nothing left to re-download.

4. Write the Date Rule

Give us one rule, phrased as a field and a range. *Every transaction with a close date between 01/01/2018 and 12/31/2018. Every transaction whose status last changed before 01/01/2020.* That's the shape it has to take, because that's what the deletion runs on.

If your purge is really several rules — one year by close date, another by the date it was added — say so up front. We'd rather scope all of it once than run it twice.

We'll confirm what the rule catches and how many transactions that is, and come back with a quote before anything happens. Small numbers are usually quicker to handle yourself: filter the Transactions list to the range with More Search Options, then open each one and delete it.

> Deleting a transaction takes everything attached to it — documents, tasks, emails, checklists, contacts, and its whole activity history — and it is permanent. Not recoverable by us, not recoverable by anyone.

5. Authorize It in Writing

The request has to come from the master admin's email address, or come from inside Pipeline while you're signed in as the master admin. Given what a bulk deletion does, we verify the requester the same way we would for a cancellation.

Then we'll ask you to reply confirming the rule, the count, and the charge — a plain *"Yes, I agree"* in writing. We don't run a deletion off a phone call or an implied go-ahead. Once it's done you'll get a receipt for the work.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help

6. Know What Deleting Doesn't Do

One expectation to correct before you decide, because it's the reason a good number of these requests get made in the first place: **deleting old transactions does not give you room on your plan.**

Your quota counts the transactions *created* in a billing cycle. A transaction from 2018 was counted in 2018. Removing it now doesn't return anything to this month, and clearing out ten years won't move your bill by a dollar. The only deletions that give quota back are ones where you created and deleted the transaction inside the same cycle — a duplicate, a test, something added by mistake this week.

Your plan renews on a monthly cycle: your transaction quota resets, and Pipeline charges your card on your bill date.

See Billing Cycle