Get Your Files Out Before You Go

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Closing your account doesn't have to mean losing the paperwork. Collect your backups while the account is still open, and the whole archive leaves with you.

Introduction

You've decided to leave, and years of transactions are sitting in Pipeline. This walks you through ending up with a complete offline set on your own drive before the account closes behind you: every document, every checklist, every activity log.

One fact shapes all of it: Pipeline builds backups for accounts that are still open. Once you cancel an account, Pipeline removes its data and there's no logging back in to fetch what you forgot. Everything below is about getting ahead of that, in the order that works.

When to Use This

- You've signed with another system and your last day on Pipeline is coming up.
- The brokerage is closing and you need every transaction you've ever done on a hard drive.
- You're canceling, but your state still requires you to hold onto records for years afterward.
- You downloaded some monthly backups over the years and you're not sure which months you're missing.
- You already canceled and now you can't log in to get your files.

> If you'd rather not download and store files at all, there's a different ending to this story: the Archive Plan keeps your records online and read-only instead. See Wind Down an Office and Keep the Records Online. Some offices do both — take the files *and* keep the online copy.

Why This Beats Canceling and Asking Later

The instinct is to stop the bill first and sort the data out afterward. It's the one order that doesn't work. Canceling removes the account from our systems, and there's no login left to pull anything through — from that point on, the only records you have are the ones already on your own computer.

It isn't always unrecoverable, but the fallback is worse than the plan. If your account was closed recently enough that the data hasn't aged out, our team can sometimes reinstate it for a fee so you can download what you missed — and then you're paying to reopen an account you just closed, on a clock you don't control. Doing it in the order below costs you nothing but a little timing.

1. Take Stock of the Backups You Already Have

Start with what's already on your drive, because it decides how much of the rest you need. Each month's backup is only downloadable for 30 days, so the gaps are usually older months that nobody got to at the time — the year someone was out, the stretch when the office changed hands.

Find the folder where your office keeps them and list the months you can account for. Work from a full list of the months your records need to cover, not from memory, and mark the holes.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

2. Order the Months You're Missing

Months that aged out of the 30-day window aren't gone — our Tech Team can re-generate them. There's a fee for it, based on how many months of data you need, and we'll quote it once you tell us which ones. The request has to come from your master admin.

Send the list of months and years in one go rather than a few at a time. It's quicker to fill several gaps in a single order, and it lets us look at the whole request when we price it.

Pipeline generates a downloadable backup of your account every month, included with your plan. Answers to the common questions about what's included, downloading, and ordering past backups.

See Monthly Backups FAQ

> Order these while the account is still open. We deliver re-generated backups into your account for you to download, so the account needs to be there to receive them.

3. Close the Gap on Your Final Month

This is the step that catches people, and it's the reason the last month of an account is so often the month that goes missing. Pipeline generates backups for active accounts, after a month has closed. So the month you cancel in never gets one: cancel on the 17th, and there's no backup coming for those 17 days.

You have two ways to handle it, and they're both fine — pick whichever suits your exit.

Either download that final month's transactions individually before you cancel, or set your cancellation date far enough out that the final backup generates first and you can grab it on your way out. If your last month is quiet, downloading by hand is quick. If it's busy, waiting for the backup is less work.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See Individual Transaction Downloads

> Downloading transactions one at a time is capped per day, and the cap moves with server load, so a busy final month can take more than one sitting. Factor that into the date you pick.

4. Open Every Archive Before You Cancel

A backup that didn't finish downloading looks completely normal sitting in a folder. It has a name, it has a size, and it's empty when you open it. People discover this months later, when the account is long closed and the file is the only copy left.

So open them now, while you still have an account to re-download from and it costs nothing. Spot-check each year: open the ZIP, click into a couple of transaction folders, confirm the documents are actually there and actually open. If one is broken, download it again today.

A backup that won't open, or that throws a "Backup Invalid" error, almost always comes down to an interrupted download or the tool you're using to unzip it. Here's how to clear each cause.

See [Why Won't My Backup Open?]

> Don't skip this one. Once the account is canceled, replacing a bad archive means reinstating the account and re-ordering the backup — assuming the data is still recoverable at all. Five minutes of checking now is the whole insurance policy.

5. Cancel Once the Files Are in Hand

With every month accounted for and every archive opened, you can close the account knowing exactly what you're keeping. Cancellation is our team's job, not a button you have to find — your master admin sends the word and we schedule it.

Ready to close your Paperless Pipeline account? Our team handles cancellation, and your master admin starts it with a single message.

See [Account Cancellation]

> Changed your mind, or found a gap after the fact? Reinstatement is sometimes possible, and how much comes back with it depends on how long it's been. Canceled an account you now want back? Reinstatement may be possible — and if you're still inside the recovery window, your data can come back with it. See [Reinstatement].