Monthly Backups

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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.

Introduction

Most offices never download a backup, and that's a reasonable way to run. Then something changes: a broker asks where the records live, an attorney wants the file set, or the office starts thinking about what happens if it ever leaves.

Pipeline builds a copy of your account every month whether you ask for it or not, so the answer to that question already exists. It's included with your plan, it holds your transactions and the documents on them, and it's yours to keep once you've downloaded it. Your data stays online for as long as the account is active, so this isn't insurance against losing it day to day. It's the version you can hold, hand over, or file somewhere that isn't us.

Nobody has to assemble the record after the fact. The one thing worth knowing is that each month's copy is available for a limited time, so a backup you want to keep is one you download rather than one you leave sitting there.

How It Works

A backup is a single ZIP file. Pipeline builds it at the close of each month and keeps it downloadable for the next 30 days.

What's Included

A backup covers every transaction with documents that was created in the previous month, plus any that became inactive (closed, expired, or fell through) that month. Anything you flag by hand comes along too.

How It's Organized

Inside the ZIP, Pipeline sorts transactions into folders by property address. Each folder holds the documents in their original format, with notes, emails, checklists, and activity history saved as plain text that opens on any computer.

When It's Ready and How Long It Lasts

Each month's backup is available at the close of that month and stays downloadable for 30 days. After that window, it's no longer available to download on demand.

Order a Past Backup

Missed a month? We can re-generate past backups for a fee of $140 per four-month period of data. Email help@paperlesspipeline.com with the months you need.

Download Your Monthly Backup

Download the current backup from the Monthly Backups page while it's available.

Who Can Do This: Users with the "Download company-wide backups" permission.

To download your monthly backup:

1. In the left menu of your dashboard, click [Monthly Backups].
2. Find the month you want and click to download the ZIP file.
3. Unzip the file to open it. Most computers can unzip it directly; if yours has trouble with a large file, use a tool like 7-Zip and choose Extract.

You'll have a full offline copy of that month's transactions and documents, organized by property address.

Include Only Completed Transactions in Your Backups

Keep active transactions out of your backups until they close, so each month's file stays smaller.

Who Can Do This: Master admins.

To include only completed transactions in your backups:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Check the option [Only include completed transactions in monthly backups].
3. Click [Save Settings].

Going forward, your monthly backups include only transactions that are closed, expired, or fell through. Each one lands in the backup for the month it finally closes or terminates.

Include a Specific Transaction in Next Month's Backup

Flag an individual transaction so it lands in the next backup even if it wouldn't get there automatically.

> **Who Can Do This**: Anyone who can edit the transaction.

To include a specific transaction in next month's backup:

1. Open the transaction, then click [Edit].
2. Check the box for [Include in next month's backup].
3. Save the transaction.

That transaction goes into the next monthly backup — handy for an active transaction, or one without docs, that you want captured anyway.

Get the Whole Record in One File

A backup covers a month at a time, so a question that spans years means opening several of them. For the transaction record rather than the documents, there's a single export that reaches back to the day the account was opened.

One click gives you every transaction your account has ever had, with every column, in a single file.

See Full Spreadsheet

Monthly Backups FAQ

Backups run on their own each month, cover transactions with documents, and stay available for 30 days. Answers to the common questions about what's included, downloading, and ordering past backups. See Monthly Backups FAQ, or Why Won't My Backup Open? if a backup won't open.

Monthly Backups Troubleshooting

Running into a problem? Start here.

- Why Won't My Backup Open?

Ways to Use Monthly Backups

See Monthly Backups at work inside a bigger job:

- Get Your Files Out Before You Go
- Produce Your Records for a State Audit