Load Your Back Catalog Without Buying a Bigger Plan

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

Ten years of closed deals and a plan sized for the ten you do this month. There's a way to get the history in without paying for a year of capacity you'll never use again — and the whole thing turns on timing.

Introduction

Your plan is a monthly transaction quota, and a transaction counts against it the month it's *created*, not the month the deal happened. So loading a back catalog looks, to your plan, exactly like the busiest month your office has ever had.

That's the problem this solves, and there are two answers to it depending on where you are. Inside your first paid month, we open the gate: tell us the number and add them all at no extra charge. After that month, there's no waiver, but there is a route that costs you a fraction of a bigger plan.

Both are below. Read the first step to work out which one is yours, because the difference between them is a bill.

When to Use This

- You've just moved to Pipeline and want your closed files from the last several years in it.
- Your state or your broker requires historical records to live in one system.
- You're coming off another platform and exporting everything you had there.
- You tried adding past deals and hit your monthly limit part-way through.
- You've been told you'd need a much larger plan just to get your history in, and it doesn't match the volume you actually do.

Why This Beats Adding Them a Few Each Month

The workaround people invent is to trickle the history in — twenty a month, in the gap under their quota, for as long as it takes. It's understandable and it's the worst version of this. A five-year catalog at twenty a month is two years of somebody remembering to do it, and in that time the deals you're actually closing get squeezed into whatever room is left. Offices that go this way usually stop a third of the way through, which leaves them with a partial history: the worst possible state for the one thing a back catalog is for.

Both routes below do it in a single sitting instead. One of them is free and the other costs the difference between two plans for one month — and either way the history is in, complete, and behind you.

1. Check Which Window You're In

One question decides everything: **are you inside the first month of a paid account?**

If yes, steps 2 through 4 are your path and this costs you nothing extra. If you're past it — even by a cycle — skip to step 5. There's no waiver after the first month, and asking for one is the most common version of this conversation that ends in disappointment.

Pipeline bills on a simple monthly transaction plan — a ladder you move up or down as your deal volume changes.

See Transaction Plans

2. Tell Us How Many You're Adding

The first-month allowance is provisioned on your account, not applied automatically — so it starts with a message. Email us and say what you're doing and roughly how many past transactions you have: two hundred, two thousand, a decade of closings. We'll open the account up so they don't count against your quota.

Do this before you start entering rather than after you've hit the ceiling. It's the same conversation either way, but one of them doesn't involve stopping half-way.

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

> The allowance is for genuine past and current deals — the history you actually did. It isn't a way to pre-create empty transactions against future months.

3. Get Everything In Before Your Next Bill Date

The window closes with your next bill. Whatever is in by then is in; whatever isn't starts counting against your quota like any other new transaction.

So work from a list and go wide rather than deep — get every deal created first, and worry about scanning documents into them later. Documents can be added months down the road; the transaction record is the part with a deadline on it.

Bring a back catalog of deals in from another system with a spreadsheet, up to 50 transactions at a time.

See External Transaction Imports

> Switching from another system and working out how to shape the export? Load Your Past Transactions Into a New Account walks the spreadsheet itself — the columns, the location and status names, and using agent email addresses rather than names.

4. Complete or Delete Any Placeholders

Transactions created without a proper name or any documents get flagged as placeholders, and they come with a deadline of their own: finish them by the end of your following billing cycle, or remove them.

That's not housekeeping for its own sake. If placeholders are still sitting there after the extended deadline, the account's ability to add past transactions can be withdrawn — so a folder of half-made records can cost you the very thing you asked for.

Work down the list before the deadline: give each one its real name, attach what you have, and delete the ones that turned out not to be deals at all.

> Deleting a placeholder tidies your account; it doesn't give you quota back unless it was created in the same billing cycle you delete it in. Quota is counted at creation, and it doesn't roll over.

5. Past the Window? Upgrade, Add, Downgrade, Ask

No waiver exists after the first month — but you don't need a bigger plan for a year to get a catalog in. You need one for a few days.

Move up to a plan large enough to hold your history plus your normal volume. Add everything *before* your next bill date. Then move back down yourself — the system won't downgrade you automatically, and a forgotten upgrade is the one way this goes wrong. Once the next bill has landed, ask the Billing Team for a pro-rated refund of the difference between the two plans.

Plans are a monthly ladder you move up and down yourself, and only newly created transactions count against your quota. Answers to the common questions about upgrading, downgrading, and what happens when you hit your limit.

See Transaction Plans FAQ

> The refund is a courtesy the Billing Team grants case by case, not an automatic entitlement — so ask, explain what you were doing, and expect a conversation rather than a button. Even without it, one month at a higher tier is far less than carrying that tier all year.

> If your volume genuinely swings month to month for ordinary reasons, moving up and down the ladder is a habit worth having rather than a one-off. See Right-Size Your Plan to Your Season.