

Bring Documents In From Another System

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dotloop, SkySlope, zipForms, CTM, TransactionDesk — none of them connect to Pipeline directly. One question decides how much work getting your documents across takes.

Introduction

There's no native integration with the other transaction and forms platforms, and no one-click import. That sounds like bad news and mostly isn't, because almost every one of those systems can email a document, and Pipeline accepts documents by email.

So the whole answer comes down to a single test: when that system emails a document, does it send the file as a real attachment, or does it send a link to a download page? Attachment means you can forward it straight into Pipeline and never touch it again. Link means somebody downloads and uploads, or you go change a setting in that system.

Run the test once per system, not once per document. Whatever the answer is, it'll be the same tomorrow.

When to Use This

- You're moving off dotloop, SkySlope, CTM, Form Simplicity, zipForms, or TransactionDesk and the documents need to come with you.
- Your e-signature service isn't DocuSign and you want the executed copies to land in Pipeline.
- You emailed docs in from another platform and nothing arrived.
- Your agents are downloading and re-uploading every document by hand and you suspect there's a faster way.
- You want a whole back catalog of closed files brought over, not just today's paperwork.

1. Test Whether That System Sends Attachments or Links

Send yourself one document from the other system, to your own inbox, the way you'd send it to a client. Then look at what arrived.

If there's a PDF attached to the message, you're done deciding — the rest of this is easy. If the message contains a button or a link to view or download the document, Pipeline can't do anything with it: a link isn't a file, and there's nothing to pull in. Check that system's send settings before you accept the answer, though. Several of them can send either way and default to links.

Two specifics worth knowing, because they're the ones that catch people out. In **zipForms**, choose [zipForms] as the sending method when you compose the email — sending through a different method silently drops the attachments. In **dotloop**, look for its own option to attach the PDF to the email rather than share a link, and ask dotloop's support if you can't find it.

2. Forward the Attachments to Your Maildrop Address

If the other system attaches real files, point it — or your forward of its email — at your maildrop address, and the documents upload themselves.

Email your documents to a maildrop address and Pipeline pulls the attachments in — no logging in, no uploading.

See [Maildrop](#)

Two ceilings apply. A single email's attachments can total 25MB, so a big packet has to be split across several messages. And a ZIP file is no help here — Pipeline can't open it to reach the PDFs inside, so unzip it before you send.

3. Turn On the Receipt So You Can See What Landed

Migrations are the one time you genuinely need to know what didn't arrive. Switch on acknowledgements and every email you send in gets a reply telling you what uploaded, what didn't, and why — which turns "some of them are missing" into a list you can act on.

Email docs into Pipeline and get a receipt back telling you what uploaded, what didn't, and why.

Ask Pipeline to write back every time you email docs in, and you'll know what uploaded and what didn't without going to look.

See [Email Acknowledgement](#)

4. Download and Upload When It Only Sends Links

When the other system won't attach files, the path is ordinary and unglamorous: download the documents to your computer, then upload them into Pipeline. You can select many files at once, so this is far less painful than doing it one document at a time.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See [Uploading Docs](#)

If the files are already in Dropbox, skip the download step — Pipeline pulls straight from Dropbox into the Unassigned queue. See [Dropbox Imports](#).

5. File What Arrives

Everything that comes in by email or upload waits in Unassigned until somebody says which transaction it belongs to and who's allowed to see it. On a migration that queue gets long, so file as you go rather than at the end.

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See [Doc Assignment](#)

Documents are only half of a migration. If you also need the deals themselves — names, dates, prices — those come in on a spreadsheet, up to 50 at a time. See [External Transaction Imports](#).
