Dropbox Imports

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Pull documents straight out of Dropbox into Unassigned Docs, without downloading them to your computer first.

Introduction

Plenty of offices keep their working files in Dropbox and move things into Pipeline as they need them. The routine that goes with that is download the document, hunt for it in your Downloads folder, upload it, then delete the copy you just made.

The Dropbox import takes the middle out of that. You pick the files where they already sit and Pipeline brings them in, so nothing has to land on your computer along the way. It's an import rather than a sync, and the difference matters when you're planning around it: documents move when you choose them, and Pipeline doesn't watch a folder, mirror a change, or push anything back the other way. Dropbox stays the place you keep files; Pipeline stays the place the deal lives.

For an office moving a stack of files across at once, those saved steps add up quickly, and the Downloads folder stops filling with client paperwork somebody has to clear out later. Everything arrives in the same queue as docs that came in by email, so filing it is the job you already know.

How It Works

The import lives on the *Unassigned* page, in the left menu, next to the other ways docs get into Pipeline.

Where Imported Docs Land

In *Unassigned Docs*, always. You can't send a doc from Dropbox straight onto a transaction, and you can't pre-assign it on the way in — it arrives in the queue like anything else and you assign it from there.

From Unassigned, filing a Dropbox import is the same job as filing anything else:

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

How to Tell a Doc Came From Dropbox

Imported docs are marked **Imported from Dropbox** in the *Email Subject / Source* column on the Unassigned page. That's worth knowing when you're trying to work out how a file arrived — a doc without that marker came in another way, usually by email to a maildrop address.

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

What You Need

Your own Dropbox account. Pipeline doesn't charge for the import and doesn't cover the cost of your Dropbox storage — you subscribe to Dropbox directly.

It Only Goes One Way

There's no sync in the other direction. Pipeline doesn't push documents, transactions, or backups out to a Dropbox folder, and no Dropbox folder can be watched for new files. To get something from Pipeline into Dropbox, download it from Pipeline and upload it to Dropbox yourself.

Import Docs From Dropbox

Bring documents from your Dropbox account straight into Unassigned Docs, without downloading them first.

Who Can Do This: Anyone who can add documents from the Unassigned page, agents included.

To import docs from Dropbox:

1. Click [Unassigned] from the top menu.
2. Click [Import from Dropbox] from the left menu.
3. Select the documents you want to bring in and click [Choose].

The documents upload to *Unassigned Docs*, marked **Imported from Dropbox** in the source column, and are ready to assign to a transaction.

Frequently Asked Questions

Do I need my own Dropbox account?

Yes. The import connects to your Dropbox account. Pipeline doesn't charge for it and doesn't cover the cost of your Dropbox storage — you subscribe to Dropbox directly.

Can I import a document straight onto a transaction?

No. Dropbox imports always land in *Unassigned Docs*. Assign them to a transaction from there, the same as anything else that arrives.

Can I pre-assign a doc I'm importing from Dropbox?

No. There's no way to pre-assign a doc on its way in from Dropbox. Import it first, then assign it on the Unassigned page.

Can Pipeline sync with a Dropbox folder so new files import automatically?

No. There's no folder watching and no automatic sync — each import is something you start yourself from the Unassigned page.

Can Pipeline send documents or monthly backups out to Dropbox?

No. The integration only brings files in. To get something into Dropbox, download it from Pipeline and upload it to Dropbox yourself. Monthly backups in particular can only be downloaded from inside Pipeline, for security reasons.

Why don't I see Import from Dropbox on my iPad or phone?

Because Dropbox doesn't support uploads in Chrome on mobile devices. The menu item is hidden as a result. Turn on **Request Desktop Site** in Chrome's menu and the option appears.