

External Transaction Imports FAQ

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The transaction import reads a spreadsheet, takes fifty rows at a time, and creates transactions rather than updating them. Answers to the common questions about limits, the fields it won't take, and moving off another system.

How many transactions can I import at once?

Fifty per spreadsheet — and never more than your monthly plan allows. A larger back catalog gets split across several files and imported one at a time.

Which systems can I import from?

Any of them. The import reads a spreadsheet, not another system, so it doesn't matter what you're coming from. Export your data, map it onto Pipeline's sample spreadsheet, and upload.

Can I add my own columns to the import?

No. Only the fields in the sample spreadsheet import. Extra columns aren't read, and whatever they hold has to be added to each transaction by hand afterwards.

Can I import commissions, notes, or memo fields?

No. None of those are import fields. Commissions go in through [Manage Commissions] on each transaction, and Pipeline's financial reports only read commission data entered in the system.

Can I re-import a spreadsheet to update transactions that are already in Pipeline?

No — you'll get duplicates. The import creates transactions and has no merge or update logic. Edit existing transactions directly instead.

Will Pipeline run the import for me?

No. For the sake of the audit trail, the import runs on your account, by you. We'll help you get the spreadsheet right and we'll read your error file with you.

How do I list agents in the spreadsheet?

By their exact Pipeline login email address, never their name. They also have to exist as users before you import. Agents from outside your company go in the outside-agent columns instead.

What about agents who have already left?

Add them, then deactivate them straight away. Create the user under their old email address and turn the profile off immediately. Their past transactions import assigned to them, their history stays attached to their name, and they never get account access.

Do imported transactions count against my monthly plan?

Yes. You can't import more in a month than your plan allows, so tell us before you load a large back catalog and we'll work out how to handle it.

Can I import checklists, tasks, or contacts the same way?

No. There's no CSV import for those. Checklist templates have a [+ Bulk Add Tasks] button where you can paste a task list one per line, and agents come in through the roster import.

Onboard your whole team at once — send us your agent list and we'll load it for you.

See [Agent Roster Import](#)

Learn More

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

See [External Transaction Imports](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
