External Transaction Imports

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

Introduction

Nobody starts using Pipeline on the day they start doing deals. You arrive with a back catalog: closed files in another system, a year of listings, records your state requires you to keep. None of it should have to be retyped.

The transaction import takes a spreadsheet and builds transactions from it, one row per deal. Most of the work is in the spreadsheet rather than in Pipeline, and it's a stricter file than people expect. The import matches your rows against what already exists in your account, character for character, which is why locations, statuses, labels, and agents want to be set up before you build the file rather than after. It's also a fixed set of columns: what the template carries is what comes across, and anything else goes in by hand afterwards.

Done in the right order, a batch is a few minutes of upload and a back catalog you can search. Done in the wrong order, it's an afternoon of error rows. That strictness isn't fussiness — a near-match that imported quietly would put a year of history in the wrong place. Build a small batch first, get it through clean, and the rest follow the same pattern.

How It Works

Pipeline gives you a sample spreadsheet with the columns already laid out. You fill it in, upload it, and every valid row becomes a transaction.

Only the Sample's Columns Import

The import reads the fields in the sample spreadsheet and nothing else. You can't add your own columns, and notes, memo fields, and commission figures don't import at all — those go in by hand afterwards. Column order doesn't matter, but the header names do.

Values Have to Match Your Account Exactly

Location names, transaction statuses, and transaction labels in your spreadsheet must match what already exists in your account, character for character. *Land & Lot* and *Land and Lot* are two different values as far as the import is concerned, and so are *North* and *North Office*.

Set your statuses up before you build the file, not after:

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See [Transaction Statuses]

Labels classify your transactions by property type, and they drive the checklists Pipeline auto-assigns.

See [Transaction Labels]

Agents Go In by Email Address

The agent columns take each person's Pipeline login email address, not their name — and that person has to exist as a user first. Outside agents belong in the outside-agent columns instead, since the in-house agent columns only accept users on your account.

Fifty at a Time, and It's All or Nothing

Each spreadsheet imports up to 50 transactions, and never more than your monthly plan allows. If any row fails, Pipeline rejects the whole batch — nothing is half-imported, which is why smaller batches are worth the extra uploads.

The Import Creates, It Doesn't Update

There's no merge step. Re-importing a spreadsheet of transactions that are already in Pipeline creates a second copy of each rather than updating the originals, so use the import for records that aren't in Pipeline yet and edit existing ones directly.

Rules for the Import Spreadsheet

Everything the import will reject, in one list:

- **Headers**: use the sample's exact column names, with the header row as row 1. An empty row above the headers fails the file.
- **Location**: required on every row, matching a Location name in your account exactly. Watch for trailing spaces.
- **Status**: required on every row, matching a status in your account.
- **Label**: required on every row if your account requires a transaction label, matching a label in your account.
- **Agents**: your own agents' Pipeline login email addresses, never their names. Agents outside your company go in the outside-agent columns.
- **Dates**: formatted MM/DD/YYYY.
- **Automatic Expiration Date**: leave it empty on anything that isn't in a Listing status — Pipeline clears it once a transaction closes.
- **Blanks**: leave a cell empty when a field doesn't apply. Don't type "N/A".
- **Batch size**: 50 transactions per spreadsheet, maximum.

Download the Sample Import Spreadsheet

> Get the template with the import's columns already laid out, so you can map your old system's export onto it.

> **Who Can Do This**: Any user with the Create Transactions permission.

To download the sample import spreadsheet:

1. Click [Transactions] from the top menu.
2. Click [Import Transactions] from the left menu.
3. From the blue box on the right, click the link to download a sample spreadsheet.

Open the downloaded file to see every field the import accepts. Build your own spreadsheet from it rather than from scratch.

Import Your Transactions

> Upload a completed spreadsheet and create up to 50 transactions from it at once.

> **Who Can Do This**: Any user with the Create Transactions permission.

To import your transactions:

1. Build your spreadsheet from the sample, using its exact column headers. The columns can be in any order.
2. Return to the *Import Transactions* page and click [Choose File].
3. Select your spreadsheet, then click [Import Spreadsheet].
4. Read the result. A green confirmation at the top of the page means the batch imported. A red error message links to a spreadsheet listing what went wrong in its rightmost column.

Imported transactions appear on your *Transactions* page like any others. If rows errored, fix them in the marked-up spreadsheet and import again — a failed batch creates nothing.

Get Your Agents Into Pipeline First

The agent columns are the part of the spreadsheet you can't talk your way out of. They take a login email address, and that address has to belong to somebody who already exists here — so build the roster before you build the file.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

External Transaction Imports FAQ

The import takes the sample spreadsheet's fields, in batches of fifty, and creates transactions rather than updating them. Answers to the common questions about limits, missing fields, and moving off another system. See External Transaction Imports FAQ.

External Transaction Imports Troubleshooting

Spreadsheet rejected? Start here.

- Why Did My Transaction Import Fail?