Load Your Past Transactions Into a New Account

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Switching to Pipeline with a year of closed deals behind you? Your history comes with you, in one spreadsheet.

Introduction

Nobody starts a brokerage the day they start using Pipeline. You arrive with a back catalog: deals closed in Brokermint, files in SkySlope or dotloop, a few hundred folders sitting in Google Drive. Your compliance obligation covers all of it, not just the deals you close from here on.

You don't have to key those in one at a time. Pipeline imports past transactions from a spreadsheet, in batches, and the import is designed for exactly this moment: you left another system and you want the record to be continuous.

The work is mostly in the spreadsheet, not in Pipeline. Get your Locations, statuses, and labels lined up first and the import is quick. Skip that and you'll spend your afternoon reading error rows.

When to Use This

- You've just moved to Pipeline from another transaction management system and want your closed deals to come with you.
- You're a new account with a back catalog of files that need to be searchable and backed up alongside your live ones.
- You need past deals in Pipeline for a compliance or audit obligation that predates your account.
- You've reactivated an account and want to load the transactions you handled while you were away.

> Moving transactions out of another *Pipeline* account rather than another system? That's a different job — a paid Data Transfer, authorized by the master admins on both accounts. Talk to support before you build a spreadsheet.

1. Check Whether You're Still in Your Onboarding Window

New accounts are provisioned for unlimited transaction entry during their first paid month, precisely so you can load your history without it eating the plan you actually need going forward. If you're inside that window, import as much as you like.

If you've passed it, don't just start importing — your plan's monthly transaction count applies, and a few hundred past deals will blow straight through it. Contact support before you upload and tell them how many past transactions you're loading. There's an established way to handle it, and it's cheaper than discovering the problem halfway through.

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

See Transaction Plans

2. Match Your Locations, Statuses, and Labels First

This is the step that decides whether your import works. Every Location name, status name, and label in your spreadsheet has to match what already exists in your Pipeline account — exactly, character for character. *Closed* and *CLOSED* are not the same value to the import, and a Location called *North Office* won't match a row that says *North*.

So set your account up before you build the file, not after. If your old system used statuses you still want, add them. If your account requires a label on every transaction, every row needs one; if you haven't set labels up at all, leave that column empty.

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

3. Download the Import Spreadsheet

Pipeline provides a sample spreadsheet with the columns already laid out. Start from that rather than building your own — the column order is what the import reads. Export your data out of your old system, then map it across into the sample's columns.

4. Fill In One Row per Transaction

Each row is one past transaction. Four columns are required: **Location**, **Transaction Name**, **Status**, and **Label**.

- **Transaction Name** — whatever your office's naming convention is. Most use the property address.
- **Agents** — list your in-house agents by their exact Pipeline login email address, not their name. A name in an email column is the single most common reason a row fails.
- **Dates** — format them MM/DD/YYYY.
- **Anything that doesn't apply** — leave the cell blank rather than typing "N/A" or a placeholder.

A transaction's name is how you'll recognize it at a glance — set it to match your office's convention.

See Transaction Names

5. Add Any Departed Agents Before You Import

Half your back catalog probably belongs to people who don't work for you anymore. You can still credit them: add the departed agent as a user under their old email address, then immediately deactivate the profile.

The import will assign their transactions to them, their history stays attached to their name for reporting, and they never get account access or clutter your active user list.

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

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

6. Upload the Spreadsheet in Batches

Import in groups of up to 50 transactions per spreadsheet. It feels slower than one giant file, but it's faster in practice — a problem in a batch of 50 is findable, and a problem in a batch of 800 is an afternoon.

Work through your catalog a batch at a time and check the results before you load the next one.

7. Fix the Rows That Error Out

If rows fail, Pipeline gives you the spreadsheet back with the errors marked. Most of the time it's one of the three usual suspects: a Location, status, or label that doesn't match the account; an agent listed by name instead of login email; or a date in the wrong format.

Fix those rows and re-import just them. If the errors don't make sense to you, send the marked-up spreadsheet to support and they'll tell you what the import is objecting to.

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