Individual Transaction Downloads

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Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

Introduction

Someone needs one deal, and they need it now. An agent leaves and wants the files she closed with you. An auditor names three transactions out of a year's work. Neither of those questions can wait a month.

A download on demand packages one transaction into a single file, and not just its documents but the record built up around them. It's the counterpart to your monthly backup, which gathers the whole account on a schedule, and the two exist for genuinely different jobs. A backup is insurance. A download is a handoff, which is why it's built around one deal and sent as a link to the person who asked for it rather than left somewhere shared.

So a request about one deal gets answered with the deal itself, complete and offline, the same day it's asked. Preparing a transaction for download is heavy work, though, so an account can only pull so many in a day. If Pipeline tells you downloads aren't available right now, that's the cap talking rather than a fault in your account, and nothing about the transaction is affected. The next day it goes through.

How It Works

You start the download from inside the transaction, and Pipeline emails you a link when the file is ready.

What You Get

The download contains everything belonging to that transaction — all of its documents, along with its notes, emails, checklists, and activity history. Because it's the complete file, an admin handing a download to an agent should first remove any documents that agent shouldn't have.

Where the Download Goes

When you start a download, Pipeline emails a download link to the address on the profile you're signed in with — the admin who requested it. For security, the link always goes to that person; it can't be redirected to another user. If the email doesn't arrive within a few minutes, check your spam or junk folder.

The Daily Download Limit

There's a daily cap on how many transactions can be downloaded from an account. If you hit it, Pipeline lets you know downloads are unavailable and to try again the next day. The count resets each day.

Download an Individual Transaction

> Download one transaction as a complete file, delivered by an emailed link.

> **Who Can Do This**: Admins of the transaction's location, and users with the "Download company-wide backups" permission.

To download an individual transaction:

1. Open the transaction you want to download.
2. In the left menu, click [Download Transaction].
3. Confirm the download. Pipeline emails you a link within a few minutes.
4. Open the email and click the link to download the transaction file.

You'll have a complete copy of that transaction. If you're passing it to an agent, remove any documents they shouldn't receive before you send it along.

When It's More Than a Few Deals

The daily cap is the thing to plan around. An agent leaving with thirty-five closed files, or an audit that names a dozen, runs past what you can pull in a day — and the account-wide copy is the other way files leave Pipeline, on a schedule instead of on demand.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

Individual Transaction Downloads FAQ

Downloads on demand are admin-only, arrive as an emailed link, and cover one full transaction at a time. Answers to the common questions about who can download, where the link goes, the daily limit, and downloading in bulk. See Individual Transaction Downloads FAQ.

Ways to Use Individual Transaction Downloads (Downloads on Demand)

See Individual Transaction Downloads (Downloads on Demand) at work inside a bigger job:

- Get an Agent's Files Offline Before They Leave
- Give an Auditor What They Need, Not Your Whole Account