Transaction Backup Inclusion FAQ

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Backups pull in transactions with documents each month; flagging one adds it even when it wouldn't be. Answers to the common questions about what's included, forcing a transaction in, and active deals.

Why isn't a transaction showing up in my backup?

The backup only sweeps in transactions with documents that were created or became inactive that month. An active deal, or one with no documents attached, won't appear on its own — flag it for inclusion to add it.

How do I force a specific transaction into the backup?

Open it, click Edit, check "Include in next month's backup," and save. It'll be captured in the next monthly backup regardless of the usual rule.

Can I include an active transaction that hasn't closed yet?

Yes. Flagging is exactly how you capture an active deal you want an offline copy of before it closes.

We only back up completed transactions — will flagging still work?

Yes. Even with the account set to include only completed transactions, a transaction you flag by hand is still added to the next backup.

Where do I download the backup itself?

From the Monthly Backups page. Flagging decides what's *in* the backup; downloading it, the 30-day window, and what's covered are all in Monthly Backups.

Learn More

Flag an individual transaction so it lands in your next monthly backup, even when Pipeline wouldn't pick it up automatically.

See Transaction Backup Inclusion

Still Have Questions?

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