Transaction Backup Inclusion

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

Introduction

You're editing a transaction and there's a checkbox about next month's backup. The question it raises is bigger than the box itself: has everything you never checked been left out of every backup you've taken?

It hasn't. The monthly backup decides for itself which transactions to sweep in, and most of the work you'd want kept meets that rule without anyone touching anything. Backup inclusion is the exception handle for what the rule leaves behind: a deal still in flight that you want an offline copy of now, or a file that wouldn't qualify on its own yet. It sits on the transaction rather than in your account settings, because it's a decision about one file rather than about the whole account.

Checking the box is you saying "this one as well," one deal at a time, on the files you know matter, without changing anything account-wide. And if you've never checked the box, nothing has been quietly slipping away. It's there for the exceptions, not for the everyday, and the backup has been doing its job while you weren't watching it.

How It Works

By default the backup follows a rule; flagging a transaction is how you make an exception to it.

What Gets Included Automatically

A monthly backup covers every transaction with documents created in the previous month, plus any that became inactive — closed, expired, or fell through — that month. A transaction that's still active, or one that has no documents attached, isn't part of the backup on its own.

What Flagging Does

Marking a transaction for inclusion adds it to the next monthly backup regardless of the usual rule. It's the way to capture an active deal you want an offline copy of now, or a transaction with no documents that the rule wouldn't otherwise pick up.

Limit the Whole Account to Completed Deals

Separately, a master admin can set the whole account to include *only* completed transactions in backups — handy when a flood of new transactions each month makes the backup too big. Even with that setting on, Pipeline still adds a transaction you flag by hand to the next backup.

Include a Specific Transaction in Your Next Backup

> Flag one transaction so Pipeline adds it to the next monthly backup even when the rule wouldn't.

Who Can Do This: Anyone who can edit the transaction.

To include a specific transaction in your next backup:

1. Open the transaction, then click [Edit].
2. Check the box for [Include in next month's backup].
3. Save the transaction.

Pipeline captures that transaction in the next monthly backup — useful for an active deal, or one without documents, that you want held onto anyway.

Where the Backup Itself Comes From

Flagging a transaction only decides what goes in. Where the backup lands once it's built, and how you get hold of it, is a different page — and it's the one to read before the month turns over rather than after.

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

Transaction Backup Inclusion FAQ

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. See Transaction Backup Inclusion FAQ.