Know What You Can Get Back Before You Delete

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What happens to a document, a transaction, and a changed field after the click: what waits for a year, what needs our team, what the history keeps, and the one habit that quietly destroys the record.

Introduction

Deleting in Pipeline is rarely the end of the story, but the story is different for each thing you delete. A document goes to a holding page and waits a year. A transaction is gone from the account the moment you confirm, and only our team can bring it back, and only for a while. A value you overwrite is not gone at all, because the Transaction History kept the old one. Knowing which is which is the difference between a two-minute fix and an email to support.

The same knowledge tells you what not to do. Some offices reuse an old transaction for a new deal to save a slot on their plan. It saves nothing, because a transaction deleted in the cycle it was created never counted, and it costs the one thing Pipeline keeps for you without being asked: an honest history of the file.

Underneath all of it sits the monthly backup, an offline copy of everything, which is the layer that answers when the others cannot.

When to Use This

- Someone deleted a document and wants it back today.
- Someone deleted a whole transaction, and it was the wrong one.
- A price or a date changed on a file and nobody remembers what it was before.
- You are out of transactions for the month and tempted to reuse an old one.
- An auditor or a departing agent needs a file that is no longer in the account.

1. Get a Deleted Document Back Yourself

A document deleted from a transaction, or from Unassigned before it reached one, goes to that page's Deleted Docs, with who removed it and when. It waits there for a year. To bring it back, click [Download] beside it and upload the file again. That is the whole recovery. There is no restore button and no bulk option. A master admin sees every deleted doc and can clear one out early, which is as final as the year running out, and documents deleted from the Reference page are not recoverable at all.

Download a deleted doc back out of Deleted Docs, then upload it again — that's the whole recovery, and you can do it without emailing us.

See Doc Recovery

2. Ask Us Quickly When a Transaction Is Deleted

Only a master admin can delete a transaction, from the red button at the bottom of the file, past a warning that

means what it says. There is no recycle bin. Our team can often restore a recently deleted transaction, and the odds fall with every day, so write in the same day if you can, with the transaction name or address. A deleted transaction is not in your monthly backup either. That is the one place the backup cannot help.

Deleted a transaction by mistake? Our team can often bring a recently deleted one back — here's how recovery works.

See Transaction Deletion

3. Find the Old Value in the Transaction History

Change the commission summary, a date, a price, or a contact, and the Transaction History records the change with the person and the time, so the value that was there before is still on the file. Click [Transaction History] in the left menu and search by the type of update, the person, or the period. It records document deletions the same way. What it cannot show is a transaction's own deletion, because the history lives on the transaction and goes with it.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

4. Do Not Recycle a Transaction

Reusing a closed transaction for a new deal breaks all three of the layers above at once. The history now describes two deals as one. The old deal can never be recovered, because it was overwritten rather than deleted. Anyone searching for it finds nothing and cannot tell why. And clearing it out is real work: checklists removed, notes and received emails deleted by a master admin one at a time, each deletion itself recorded. A deal that fell through gets a New Offer instead, and a listing that is coming back gets one too.

Restart a deal or take the next offer as a new transaction, linked to the one before it.

See New Offers

For a transaction that should never have existed, a duplicate or a test, delete it. If you delete it in the same billing cycle it was created, it does not count against your quota, so recycling it saves nothing.

Your plan renews on a monthly cycle: your transaction quota resets, and Pipeline charges your card on your bill date.

See Billing Cycle

5. Keep the Copy That Answers Everything Else

At the close of every month Pipeline builds a ZIP of the whole account, sorted into folders by property address, with each transaction's documents, notes, email history, and activity log. It stays downloadable for thirty days, and a re-generated copy of an older month can be requested. Nothing in it restores to Pipeline with a click, but a document can be uploaded back from it, and the record answers an auditor whether or not the transaction still exists. For one file rather than the whole month, download the transaction on its own.

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

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

See Individual Transaction Downloads