Keeping the Record

Last Modified on 11/10/2026 12:21 pm EST

Compliance questions arrive months after the deal. Two things carry most of the answers: what each person could do with a document, and how long a removed one stays recoverable.

Introduction

The account keeps more than it appears to. A deleted document is not gone, a review is recorded with a name and a date, and backups exist for periods nobody thought to download.

This page is the account-level view of that: what people can do, what is kept, and where to go when someone needs proof.

1. Set What People Can Do With Documents

Uploading, assigning, reviewing and deleting are separate permissions. Deleting is the one worth granting narrowly, since it is the one people are surprised someone had.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

2. Find Something That Was Deleted

A removed document lands here for a year with a record of who removed it and when. Check here before concluding anything is lost.

Delete a doc and it doesn't vanish. It lands in *Deleted Docs*, where it stays for a year with a record of who removed it and when.

See Deleted Docs

3. Put a Deleted Doc Back

Download it from Deleted Docs and upload it again. That is the whole recovery, inside a one-year window, and nobody has to email us.

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

4. Hand an Agent a Closed File

One closed transaction, downloaded on its own, without waiting for the monthly backup. There is a daily limit on how many.

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

See Individual Transaction Downloads

5. Get a Deleted Transaction Back

Deleting a transaction is permanent on your side and it will not be in your backup. Our team can often recover a recently deleted one when you tell us what to look for.

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

See Transaction Deletion

6. Know What Pipeline Keeps and for How Long

What stays, what is recoverable, and for how long. The page to read before answering a records-retention question for an auditor.

How long does Pipeline keep your data? Here's what stays, what's recoverable, and for how long.

See Data Retention

7. Track What Reached Your Accounting System

If your offices key closed files into QuickBooks or Lone Wolf, a second checkbox tracks what has crossed over, so nothing is entered twice or missed.

Already keying closed files into QuickBooks, Lone Wolf, or another outside system? Turn on *Entered Docs* and every doc gets a second checkbox so you can track what's made it across.

See Entered Docs