Monthly Backups

SUMMARY

Monthly backups are included in your Paperless Pipeline plan and are automatically generated and accessible from within your account.

Monthly Backups

Monthly backups are automatically available for those offices that want the additional comfort of having on-site backups or who want to have their backups on site in the event they cancel their subscription in the future.

Downloading your monthly backups is not required. The data in your paperless system is more secure than it would be in the average real estate office and is retained online for active, paid accounts for 10 years (from the time a transaction is created). Backups are included in your monthly plan and must be downloaded within 30 days.

In addition to monthly backups, you also have the ability to generate individual transaction backups on-demand.

Learn more about how to Download Individual Transactions on Demand →

Accessing Backups

Users with the "Download company-wide backups" permission can access monthly backups by clicking *Monthly Backups* from the left menu of the dashboard. Backups are available at the close of each month and are available for download for 30 days.

What's Included

The monthly backup includes all transactions created during the previous month, as well as all transactions that become inactive (closed, expired, or fell through) in the previous month. It will also include any transactions where you have manually checked the [Include in Backup] checkbox (e.g., active transactions you want to be included).

If a doc is added to a transaction after it becomes inactive and has been backed up, Pipeline will automatically back the transaction up again during the next monthly backup.

For accounts subscribed to the Commission Reporting module, all financial information and CDAs will be included in the archive when the transaction gets backed up.

> ⚠ Only transactions containing docs are included in monthly backups.

> ⚠ Transactions added during the previous month will **not** be included in the monthly backup when the [Only include complete transactions in monthly backups] Company Settings is checked.

How is the Monthly Backup Organized?

The transactions are organized in folders by property address and include everything associated with a transaction: Documents, notes, checklists, emails, and activity history.

Docs are included in their original format, while notes, emails, checklists, and activity history are in plain text format which is compatible with all computers.

The backup is in the universal ZIP file format and can be opened using the unzip option built in to most computer systems. You can also use 7-zip to open the downloaded backup file if your computer's default unzip option isn't working:

> 💡 Download and install 7-zip here →

Past Backups

The last month's backup is available for 30 days after the end of that month. After that, the cost is $100 per four months of backups.

Past backups can be generated for a fee of $100 per four months of data.

Contact help@paperlesspipeline.com to request any past backups.

> We also offer an affordable ongoing Archive Plan →

Archive Plan

Paperless Pipeline offers an affordable ongoing Archive Plan for $20/month for users who wish to retain online access to their existing data without actively using the service. This Archive option is offered for the convenience of companies that don't want to download and store their data backups on their own premises every month. If you plan on utilizing this $20/month option (if you ever decide to cancel your normal Paperless Pipeline account), you do not need to download offline backups every month.

Under the Archive Plan:

- New transactions can not be created
- All transactions and other data will continue to be available online (this is not an offline service).
- Archive Plan pricing will not go into effect until a user has cancelled their normal plan
- Past offline backups are not generated under this plan. See "Past Backups" above if you need past offline backups.

> Master admins: To convert an account from a subscription plan to the Archive Plan, email help@paperlesspipeline.com once you are ready to cancel your subscription plan and **you are certain you don't need to make any further additions or changes to your online data.**

Pipeline Pro Webinar Recording: Backups - Where's your data?

🕐 9:50

To Backup or Not to Backup

In this Pipeline Pro session, learn the options, alternatives, tips, and best practices for managing your backups and the data within.

🕐 9:20

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