

Import Transactions into Pipeline from Other Systems

SUMMARY

This article explains how to import transactions from another system by uploading a CSV file into Paperless Pipeline.

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Download a Sample Spreadsheet

To download a sample spreadsheet:

- 1 Click [Transactions] from the top menu.
- 2 Click [Import Transactions].
- 3 From the blue box on the right, click {download a sample spreadsheet here}.
View the downloaded spreadsheet to learn the fields needed for the import.

 You can import up to 50 transactions at a time, but never more than your monthly plan allows.

Import a Custom Spreadsheet

To import your transactions:

- 1 **Create your own spreadsheet** using the exact field names (column headers) included in the sample spreadsheet.
- 2 **Return to Pipeline's import transactions page and click [Choose File].**
- 3 **Locate and select your spreadsheet then click [Import Spreadsheet].**

- **If the transactions import successfully**, a green confirmation message will appear at the top of the page.
- **If errors were encountered**, you'll see a red error message containing a link to a spreadsheet. **Download the spreadsheet and view the errors** that appear in the rightmost column. Make the corrections needed, then try importing again.

 When editing your custom spreadsheet, remember that column names must match the names in the sample spreadsheet, but they can be in any order.

 If there are errors preventing one or more of the transactions from being imported, none of the transactions will be imported.

Tips for Importing Transactions

- Only 50 transactions may be imported at a time. If you have more than 50 transactions to import, you'll need to split them into multiple spreadsheets.
- When completing the spreadsheet, be sure to use the location name, transaction labels, and transaction statuses exactly as they are named in your Paperless Pipeline account.
- Be sure to add your agents as users into Pipeline before importing your spreadsheet. When listing your agent in the listing agent or selling agent columns be sure to list their email address as it appears in Pipeline (not the agent name).
- If a field does not apply, leave it blank (do not enter "N/A").