

Download a Transaction Checklist (for Transaction Coordinators)

SUMMARY

Learn how to download a checklist from a transaction to collaborate or share offline.

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Introduction

Checklist tasks nearly always contain information essential to managing critical contract and timeline dates and deadlines, necessary for bringing transactions to a timely and successful close. Use downloadable checklist timelines to collaborate and share these important dates with agents, buyers or sellers, team members, or clients (for TCs), including contacts who don't have access to your Paperless Pipeline account.

Who Can Do This?

Only [master admins](#) and admins with permission to *Fully Manage Checklists and Templates* can download transaction checklists.

Download a Transaction Checklist

To download a transaction checklist:

- 1 Go to a transaction's *Checklists* area.
- 2 Hover over the *Checklist Name* and click the [Download icon]

View the Download

To view the downloaded checklist:

1 Open the downloaded checklist in your preferred app for spreadsheets.

The screenshot displays the Paperless Pipeline web application. On the left is a sidebar with navigation options: View Transaction, Edit Transaction, Upload Docs, Assign Docs, New Offer, Transaction History, Deleted Docs, Received Emails (0), Download Transaction, and Manage Commissions. Below these is a 'Checklists' section with a 'Pending Sale' category. A checklist is shown with items like Inspection, Property Inspection Report, Termite Report, Appraisal Report, Commission Disbursement Authorization, Home Warranty Application, Request for Mortgage Information, Closing Disclosure, and Final Walk Through, each with a due date. The main content area is titled '789 Third Street' and shows transaction details: Status (Pending), Side (Listing), Location (Paperless Real Estate), Listed On (Apr 7, 2022), Accepted On (Apr 28, 2022), and Closes On (Jun 3, 2022). It also lists the List Price (\$250,000) and Sale Price (\$235,000) with a Total Commission of \$7,050. The inspection date is May 13, 2022. At the bottom, the listing agent Betty Stone is listed with her contact information. A table at the very bottom shows document upload progress.

Label	Document Name	Added On	Review
1	Inspection	5/13	
2	Property Inspection Report	5/18	
3	Termite Report	5/18	
4	Appraisal Report	5/18	
5	Commission Disbursement Authorization	5/18	
6	Home Warranty Application	5/18	
7	Request for Mortgage Information	6/2	
8	Closing Disclosure	6/2	
9	Final Walk Through	6/2	

Pipeline Pro Tip: To quickly expand all columns in Excel to match the width of your specific timeline's data, click the upper left master cell, then double-click any column separator (as shown above).