Get a Checklist or Task List Onto Paper

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There's no print button on a checklist. There are three routes to paper, and which one you take depends on whether you're printing a template, a transaction's checklist, or your task list.

Introduction

People want checklists on paper for good reasons. A closing you want to mark up by hand. A new coordinator you're training. A file you're reviewing away from a screen. Pipeline doesn't have a dedicated print feature for any of it, which sends most people to the browser's print command straight away.

That works, and for two of the three cases it isn't the best answer available. A checklist can also come out as a spreadsheet, and the spreadsheet carries things the printed page doesn't. Worth thirty seconds of choosing before you print.

When to Use This

- You want a paper checklist to mark up during a closing.
- You're training someone and want the checklist template printed out.
- You need today's tasks on paper, not the whole page of them.
- You want a record of who checked off what and when, not just a list of the tasks.
- You went looking for a print or export option on a checklist and there isn't one.

Why This Beats Printing the Screen

The reflex is to print the page you're looking at, and the reflex is why so many people end up disappointed with the result. A printed screen gives you the checklist as it's displayed: the task names, the boxes, and whatever order the page happened to be in.

A downloaded checklist gives you the same tasks plus the things the display leaves out, including each task's due-date rule, the date it actually landed on, and for anything already done, who checked it off and when. If what you need is something to mark up, print the page. If what you need is a record, take the download. The two look similar and answer completely different questions.

1. Decide What You're Printing

Three things get called *the checklist*, and they come out three different ways.

- **A checklist template** — the master list your office reuses, which lives under your settings and isn't attached to any deal.
- **A transaction's checklist** — the applied copy on one file, with its real due dates and its progress.
- **The Tasks page** — every task with a due date, across all your transactions at once.

Pick the one you mean, then take the matching route below.

2. Print a Checklist Template

A template downloads as its own spreadsheet, one file per template, from the page where your templates live. That's the cleanest way to get one on paper, because a spreadsheet prints the way you want it to and you can widen or trim columns first. Printing the template page from your browser works too, and is quicker if you just want it as it appears.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates



It's one template per file, with no option that pulls every template at once. For a full set, download them one at a time.

3. Print a Transaction's Checklist

On a live deal you have both routes. Download the checklist from the transaction to get its full timeline as a spreadsheet, or print the transaction itself from your browser, where the checklists render on the first pages of the printout.

Some of Pipeline's lists come out as their own spreadsheet — your user roster and a transaction's checklist timeline, ready to work with offline.

See List Downloads



The download is also the answer to a question that looks unrelated: *can I see everything that's been done on this file and when*. There's no single report for that, but a checklist download carries each task's due-date rule, its actual due date, and the person and date behind every completed box.

4. Print Your Tasks Page

The Tasks page has no download of its own, so this one is the browser print, and it's designed to come out compactly. Sort and filter the page first so you're printing the list you actually want, then print it.

The Tasks page gathers every task with a due date across all your transactions in one place — shaped by the columns you show and the order you sort.

See Tasks List



A long list runs across several pages on screen, and printing takes them one page at a time. Save to PDF the same way if you'd rather have a file than paper.

5. Print Just One Day

Printing the whole Tasks page to get at one day's work is the common complaint, and the browser can narrow it for you.

Open the Tasks page and sort it by due date, so the day you want sits together. Then select that day's rows and print only the selection, as Print Exactly What You Need From Pipeline shows.