

List Downloads FAQ

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The user list and a transaction's checklist each download as their own spreadsheet. Answers to the common questions about what's included, deactivated users, and bulk changes.

What's in the downloaded user list?

Everything on their profile that matters for access. Each row carries the name, email address, role, office location, permissions, start date, user ID, and the maildrop address docs can be emailed to.

Does the user list include deactivated users?

No. The download covers active users only, and there's no option to add the deactivated ones.

Who can download the user list?

Admins who can manage users. If the option has disappeared for someone who used to have it, their permissions have changed — check what they're granted on their profile.

Why won't Download User List click?

The search area is open. Click [Search] at the top of the Manage Users page to collapse the search area, and [Download User List] becomes clickable again.

Can I edit the user list and upload it back?

Not yourself. Send the updated file to us with your master admin's authorization and our team can run a bulk update. It usually takes a few business days and carries a fee, so email us first for the current figure.

Can I download all my checklist templates at once?

No. Templates download one at a time from the Checklists page. If you're comparing them, download each and paste them into a single sheet.

Does a checklist download show only the outstanding tasks?

No. The download is the full timeline, completed tasks included. To send just what's left, email from the transaction and attach incomplete tasks instead.

Are phone numbers in the user list?

No. Phone numbers aren't one of the columns. Email us if you need a roster that includes them and we'll see what

we can pull for you.

Learn More

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
