List Downloads

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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.

Introduction

Transactions and contacts are the exports people go looking for. Two smaller ones sit off to the side and are easy to miss: the list of people in your account, and the checklist timeline on a single transaction.

Both come out of the pages that own them rather than from the *Reports* page, which is part of why they're easy to overlook. The user list is the roster behind *Manage Users*, written out as it stands today. The checklist download is one transaction's timeline of what got completed and when. Each one is the list you're already looking at, in spreadsheet form.

A user roster becomes a permissions audit or the start of a review. A checklist timeline becomes something you can send to a client or a co-op agent who has no Pipeline login, which is usually why someone wants one. Both leave Pipeline behind once they're downloaded: whatever you change in either file stays in the file, and Pipeline keeps its own copy as it was.

How It Works

Each list downloads from the page it lives on, and each comes out ready to sort.

What the User List Holds

A row for each user, carrying the name, email address, role, office location, permissions, start date, user ID, and the maildrop address docs can be emailed to. It's the fastest way to see who has what access without opening profiles one at a time.

Active Users Only

The user list downloads your active roster. Deactivated users are left out, and there's no option to include them.

What a Checklist Download Holds

The full timeline for one checklist on one transaction, completed tasks included. It's the whole list rather than just what's outstanding.

Changes Made in the File Stay in the File

Neither download comes back in. There's no self-serve upload that applies spreadsheet edits to your users, though our team can run a bulk update for you if you send the file with your master admin's authorization.

Download Your User List

Take your active roster out as a spreadsheet, with each person's role, permissions, and details.

Who Can Do This: Admins who can manage users.

To download your user list:

1. Click [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users] from the left menu.
3. Click [Download User List] from the top of the page.

The roster downloads as a spreadsheet you can open in Excel, Google Sheets, or your usual app.

The Manage Users page lists everyone on your account — the active roster by default, with each person's record a click away.

See Users List

Download a Transaction's Checklist

Save a transaction's checklist timeline as a spreadsheet to share with someone outside Pipeline.

Who Can Do This: Master admins, and admins with permission to fully manage checklists and templates.

To download a transaction's checklist:

1. Open the transaction and go to its *Checklists* area.
2. Hover over the checklist's name, then click [the download icon].

The checklist downloads as a spreadsheet holding its full timeline, ready to open, print, or send on.

Where Checklist Templates Download

A checklist template downloads from the Checklists page rather than from here, one template per file. There's no bulk option that pulls every template at once.

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

See Checklist Templates

List Downloads FAQ

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. See List Downloads FAQ.