Transaction Spreadsheet Downloads FAQ

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Transaction spreadsheets come two ways: a ready-made year, or the exact list you searched and sorted. Answers to the common questions about who can download them, column choices, and the 1,000-transaction limit.

Who can download a transaction spreadsheet?

Admins. Agents can't download transaction spreadsheets, so an agent who needs one asks an admin to run it and share the file.

How many transactions can one download hold?

1,000 on a search-results download. For more than that, break the search into smaller date ranges and download each, or use the Full Spreadsheet, which has no row limit.

Can I choose which columns come through?

Yes, on a search-results download. **Include only displayed columns** matches the page, so hidden columns stay out. **Include all transaction columns** gives you every field.

Do my custom fields appear in the spreadsheet?

Yes. Custom fields come through as their own columns when you download all transaction columns, and they're in the Full Spreadsheet too.

Can I add my own columns to the report?

No. The spreadsheet carries the fields Pipeline holds, and there's no way to build a report template with columns of your own. Add what you need in your spreadsheet app after the download.

How do I get a spreadsheet for a year that isn't listed?

Search a date range, or use the Full Spreadsheet.Search the Transactions page with a date range covering that year and download the results, or download the Full Spreadsheet and filter it by year in your spreadsheet app.

Why doesn't a year spreadsheet match my closings for that year?

It's built on when a transaction was added, not when it closed.A deal added in one year and closed in the next appears on the earlier year's file. For closings, search by close date and download the results.

Can I edit the spreadsheet and load it back into Pipeline?

No. The download is a copy to take away. Changes made in the spreadsheet stay in the spreadsheet.

Learn More

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

Still Have Questions?

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