Transaction Spreadsheet Downloads

Last Modified on 09/04/2026 11:13 am EDT

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

Introduction

Somebody wants a list. The state wants two years of transactions for an audit, the franchise wants its own template filled in, your CRM wants the deals loaded, or you want to total something Pipeline doesn't total for you.

A transaction spreadsheet is your deals in a file that Excel, Google Sheets, or whatever you already use can open. There are two ways to get one, and they suit different questions. Ready-made spreadsheets for the current year and the one before it sit waiting under **Downloads**, which is the fast route when a whole year is what you're after. The other way starts with a search: shape the list on the page first, then take down exactly the list you shaped.

One thing to know before you reach for a year file. The year in its name is the year a transaction was added, not the year it closed, so a search you shape yourself is the more reliable route when a date range is what actually matters. Either way the file lands in a tool that does the parts Pipeline doesn't, the sorting and the totalling and the pasting into somebody else's format.

How It Works

Downloading is either the last step of a search or a single click when you want a whole year.

Where the Downloads Live

Open the *Transactions* page and look at the **Downloads** section of the left menu. That's where the year spreadsheets sit, alongside the Full Spreadsheet and All Contacts.

Ready-made or Shaped by You

A year spreadsheet is one click and covers that whole calendar year. A search-results download is the one you shape first: search, filter, and sort the Transactions page until the list is right, then download what's showing.

Which Columns You Get

When you download search results, you choose. **Include only displayed columns** matches what's on screen, so anything you've hidden stays out. **Include all transaction columns** gives you every field Pipeline holds for those transactions, custom fields included.

The 1,000-Transaction Limit

A search-results download stops at 1,000 transactions, which keeps it quick. For a bigger pull, break the search into date-range chunks and download each one, or take the Full Spreadsheet and trim it in your spreadsheet app.

Which Year a Transaction Counts In

A year spreadsheet holds the transactions that were *added* to Pipeline that year, not the ones that closed in it. A deal entered last December and closed this March sits on last year's spreadsheet.

Download a Year's Transaction Spreadsheet

Grab a whole calendar year of transactions in one click from the Transactions page.

Who Can Do This: Admins. Agents can't download transaction spreadsheets.

To download a year's transaction spreadsheet:

1. Click [Transactions] from the top menu.
2. In the **Downloads** section of the left menu, click the year you want.

The spreadsheet downloads to your computer. Open it in your usual spreadsheet app, then sort and filter from there.

Download Your Search Results

Search and sort the Transactions page first, then take that exact list out as a spreadsheet.

Who Can Do This: Admins. Agents can't download transaction spreadsheets.

To download your search results:

1. Search and sort the *Transactions* page until the list shows the transactions you want.
2. Click [Download].
3. Select [Include only displayed columns] for the columns on screen, or [Include all transaction columns] for every field.
4. Click [Download Search].

You'll get a spreadsheet of your results. Hidden columns aren't included when you choose "Include only displayed columns."

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

Where Other Downloads Live

This article covers lists of transactions. A single transaction's own documents, and the account-wide monthly copy, are separate things.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See Individual Transaction Downloads

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

Transaction Spreadsheet Downloads FAQ

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. See Transaction Spreadsheet Downloads FAQ.

Transaction Spreadsheet Downloads Troubleshooting

Rows missing from a file you just downloaded? Start here.

- Why Is My Transaction Spreadsheet Missing Transactions?