Transaction Spreadsheet Downloads

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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. A zip code Pipeline recognized at the end of a transaction name comes out as its own column, so you can sort and filter on it. See Transaction Names.

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 Results].

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

Frequently Asked Questions

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.