Turn a Pipeline Download Into the Report You Need

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The download is raw material, not the report. The report is a few minutes of work in a spreadsheet app, and it starts with one choice you make before you click.

Introduction

Pipeline gives you the data and leaves the shaping to you. That's why there's no report builder in the product and why almost every reporting question ends the same way: download the transactions, then make the report you wanted in Excel or Google Sheets.

The moves are always the same handful. Sort it into order, total a column by agent, split the address so you can filter by city, delete what shouldn't leave your desk. None of it is complicated, and all of it goes faster when the file you started with has the right columns in it, which is decided at the moment you download and can't be fixed afterward.

When to Use This

- You need totals by agent and there's no report in Pipeline that produces them.
- You want to filter by city or state and the whole address is sitting in one column.
- A column you needed, like commission or a custom field, isn't in the file you downloaded.
- The file opened read-only, or you don't have Excel at all.
- You're handing the spreadsheet to an agent and don't want them to have every column in it.

Why This Beats Waiting for a Custom Report

The instinct is to ask for the report to be built: a lender column added to the transaction download, a totals row by agent, an export that comes out already filtered. Those requests are reasonable and they're also a queue you'd be waiting in, while the data you need is already sitting in a file you can have in one click.

Treat the download as the first step rather than the deliverable and the wait disappears. Everything a custom report would have done to the data, you can do to it, and you can do it differently next month without asking anyone.

1. Start From the Right Download

Two files, and the difference is whether you shape the list in Pipeline or in the spreadsheet. The *Full Spreadsheet* takes everything and hands the shaping to you, which is usually the right call when you don't yet know what the report needs. A search-results download shapes it first, which is faster when you do.

One click gives you every transaction your account has ever had, with every column, in a single file.

See Full Spreadsheet

> A year spreadsheet holds the transactions *added* in that year, not the ones that closed in it. That's the usual reason a commission total from a year file doesn't match the same total on a report, so use the Full Spreadsheet or a close-date search when the report is about closings.

2. Choose Your Columns Before You Click

When you download search results, Pipeline asks which columns you want, and this is the choice worth slowing down for. **Include only displayed columns** matches what's on screen, which is tidy and leaves out everything you'd hidden. **Include all transaction columns** gives you every field Pipeline holds, custom fields included, which is the one you want if the report needs commission, a custom field, or the buyer and seller contact details.

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

See Transaction Spreadsheet Downloads

> The choice also moves everything. Close Date lands in column O when you take all columns, and in column I when you take only the displayed ones. So if you're building a formula or a template you plan to reuse each month, download the same way every time, or point the formula at the header rather than the letter.

3. Open It Where You Actually Work

Pipeline exports .xlsx, not CSV. That file opens in Excel, Google Sheets, Numbers, or any spreadsheet app you already have, so nobody needs an Office licence to read a Pipeline report.

Two small things that stop people at the door. In Excel, a downloaded file often opens in Protected View, and you have to click **Enable Editing** before you can sort or edit anything. And which app opens .xlsx by default is a setting on your computer rather than anything in Pipeline, so if you'd rather these went straight to Google Sheets, that's changed on your side.

4. Set the Sheet Up Before You Touch the Data

Two minutes here saves the next twenty. Freeze the header row so the column names stay visible while you scroll, then sort by whatever your report is organized around. Sorting by **Added On** turns the file into a chronological list of your deals; sorting by agent groups everyone's work together before you start totalling it.

This is also where you answer questions the search couldn't. Pipeline searches one field at a time, so a question like *which of this agent's files carry a Late File note* has no single search behind it. Search the agent, download, then filter the note column in the spreadsheet, and the two-part question answers itself.

5. Split the Address to Filter by City or State

The property address arrives as one column, which is right for reading and wrong for filtering. Any geographic cut you want to make needs the city and the state in columns of their own.

To split the address column:

1. Insert two or three empty columns to the right of the address column, so nothing gets overwritten.
2. Select the address column.
3. Use your spreadsheet app's text-to-columns tool and split on the comma.
4. Name the new columns and filter or sort by city or state from there.

It's a one-time job per file, and it's what turns a flat export into something you can slice by market.

6. Take Out What Shouldn't Leave Your Desk

The last step is subtraction. A spreadsheet with all transaction columns carries commission figures, admin notes, and client contact details, and most of the people who ask you for a report need three columns of it.

Delete the rest before you send it. That's true when the recipient is an agent asking for their own deals, and truer when it's someone outside the brokerage.