Print Exactly What You Need From Pipeline

Last Modified on 11/10/2026 12:21 pm EST

Paperless Pipeline has no print button, and it doesn't need one. Every page is laid out for paper, your browser's print command is the button, and a few habits decide whether you get the whole page, one section of it, or a PDF you can send.

Introduction

The system is paperless. The closing table, the Monday meeting, and the auditor are not. Sooner or later you need a checklist to mark up by hand, a list of pending deals for the office wall, or the email thread on one file as something a person can read. The reflex is to look for a print option somewhere in Pipeline, and there isn't one on the page. Your browser's print command is the print button, and each page is built to meet it: the left menu drops away, a list fits the width of the paper, and a transaction comes out in a fixed order with its checklists on the first pages.

What decides the result is what you do before you press print. Filter the list to the deals you mean. Hide the columns you don't need so the rest have room. Expand the emails you want and leave the rest closed. Select one section when the whole page is too much. The same dialog that sends a page to the printer saves it as a PDF, so every printout is also a file you can attach to an email.

Checklists are the thing people print most, and they have a route of their own that covers templates, a live transaction's checklist, and the Tasks page.

When to Use This

- Your staff print the pending list every week, and last time the address column came out trimmed or the addresses were missing.
- A licensing board, a carrier, or a client wants the emails on a deal on paper or as one PDF, not as a data file.
- You need one document, or a whole file, on paper and went looking for a print-all button.
- You want one part of a page: today's tasks, the contacts on a deal, one checklist, and not the rest.
- A broker wants a report for a meeting, and the report opened on the screen instead of downloading.

1. Shape the List, Then Print It

The Transactions page and the Tasks page print as they look: the rows your search returned, in the order you sorted them, showing only the columns you have on. So the printout is only as good as the list. Search or filter to the deals you mean, sort them, and hide any column you don't need. The columns left spread out to fill the page, which is also the fix when a long address comes out trimmed. Then print (Windows: Ctrl + P · Mac: Cmd + P). Tasks Search narrows the Tasks page the same way, and when the list is a report in all but name, Turn Any Page in Pipeline Into a Report shows how far the Transactions page will go.

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

Show the fields your job runs on and hide the rest. Your column choices are personal to you, and Pipeline holds them for next time.

See List Column Preferences

2. Print the Whole Transaction

Open the transaction and print it. Pipeline prints the checklists on the first pages, so the part most people want is on top and can be pulled off on its own, then the rest of the page, with the notes and sent emails at the end. Received mail lives on its own page and is not part of this printout. When what someone needs is a summary to hand to escrow or a client rather than the whole page, the coversheet is built for that: your office decides which fields it carries, so what goes out is the page you meant to send, and Hand Escrow Everything They Need on One Page walks through it.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

Choose which details lead your company's coversheet and which fields appear on it at all.

See Coversheet Layout

3. Print Only the Part You Selected

Often you don't want the page, you want one piece of it: the contacts on a deal, the notes and sent emails, one day's tasks. Your browser can print a selection instead of the page, and it works anywhere in Pipeline.

To print part of a page:

1. Click and drag to select the part you want, from its heading to its last line.
2. Open the print dialog (Windows: Ctrl + P · Mac: Cmd + P).
3. In Chrome, expand More settings and choose Selection only. In Firefox, right-click the selection and choose Print Selection instead.
4. Click [Print], or pick the PDF destination to save it as a file.

Only the highlighted part prints, laid out as it was on the page.

4. Get a Checklist Onto Paper

A checklist template downloads as a spreadsheet. A transaction's checklist prints on the first pages of the transaction, or downloads with its full timeline, including each task's due-date rule and the person and date behind every completed box. The Tasks page prints as the list you filtered. Dragging a whole checklist into a note to get that history onto paper is no longer needed; the checklist download carries it.

There's no print button on a checklist. There are three routes to paper, and which one you take depends on whether you're printing a template, a transaction's checklist, or your task list.

See Get a Checklist or Task List Onto Paper

5. Print an Email Thread From Received Emails

Received mail has its own page, so it prints on its own. Click [Received Emails] in the left menu, expand each message you want, and print the page. Messages you leave collapsed stay out, which is how you print one thread from a long list. Received mail is stored as plain text on purpose, so a heavily formatted message can look like code on paper; print it to a PDF and email that instead when the layout matters. When the request is for the record as a file rather than on paper, Hand Over a Transaction's Email History covers the download that carries it.

Forward an email into a transaction and it stays there — the subject, the message, and a record of what came attached.

See Received Emails

The notes and emails you sent from the transaction print at the end of the transaction, or on their own if you select that section first.

Every note you add and every email you send from a transaction lands in one running log at the bottom of the page.

See Notes & Sent Emails

6. Print a Document From Its Original

There is no print button in the preview. Click the doc's name to open the preview, then click [Open Doc]. The original opens in a separate window, exactly as it was uploaded, and your browser's print command prints it from there. For several documents at once there is no print-all; merge them into one file first, then print that one, and Combine Documents Into One File to Send or Print shows the order to do it in.

Click a doc's name and it opens right there on the page — read it, page through it, and keep working without downloading a thing.

See Doc Preview

7. Print a Report From the Screen or From Its Download

Reports come out two ways, and the way tells you how to print. A report that opens on the screen, like the Commission Summary, prints with your browser's print command as it is displayed. A report that downloads, like Usage by Agent or the transaction spreadsheet, opens in your spreadsheet app, and you set the columns and print from there.

The Reports page holds the production and inventory reports every account has, the usage reports, the downloads, and the financial reports that arrive with the Commission Module.

See Reports

8. Save It as a PDF Instead

Anything you can print you can save as a PDF from the same dialog, and the PDF is often the better answer: it attaches to an email, it keeps a copy of the list you printed, and it turns an expanded email thread into one file.

To save a printout as a PDF:

1. Set the page up as you would to print it: filter it, expand the messages you want, or select the part you need.

2. Open the print dialog (Windows: Ctrl + P · Mac: Cmd + P).
3. Under Destination or Printer, choose Save as PDF, or Microsoft Print to PDF on Windows.
4. Click [Save] and choose where the file goes.

You have a PDF of exactly what would have printed, ready to attach to an email.