Turn Any Page in Pipeline Into a Report

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

The Home page tells you where to look, the Transactions page becomes whatever report you shape it into, and three reports under Reports answer the questions a broker asks most. Agents can pull their own numbers without asking.

Introduction

Most reporting questions in a brokerage are small and frequent. What is closing this week. What did one agent close this year. Who has stopped logging in. How did March compare with last March. The answers are in Pipeline, but they are spread across the Home page, the Transactions page, and the Reports page, and each one has a shorter route than the one most people take.

The Home page is a dashboard you can leave arranged the way you want it. The Transactions page is a report builder that also saves, prints, shares, and downloads what you built. Two reports under Reports, Usage by Agent and Comparative Production, answer questions people usually try to answer from memory. And for offices on the Commission Module, agents can run their own commission reports and receive their own monthly numbers, which takes those requests off your desk.

You end up with the recurring questions answered in one click, and the one-off questions answered without a spreadsheet you keep by hand.

When to Use This

- You start each day by scrolling the Transactions list to work out what needs attention.
- Someone asks for one agent's closed deals this year and you build the list from scratch.
- You want a report printed, saved as a PDF, or in a teammate's hands without downloading anything.
- You suspect some agents never log in and want the list, not the hunch.
- A slow month feels slow and you want to know whether it is normal for that month.
- Agents text you for their commission figures mid-month.

1. Start on the Home Page

Your Home page opens with your cursor already in the Search Active Transactions field. Type a few letters of a deal you are working on, arrow down to it, and press Enter. When you do not know where to start, the stat tiles do: live counts of transactions closing in seven days, tasks due today, and docs waiting on you. Click [Show List] on any tile and the detail opens right on the Home page, with a red flag on anything closing today and each deal's checklist completion ratio. Leave a list open and it is still open the next time you land here. Close one and it stays closed.

Your Home page opens on a row of live counts: closings this week, tasks due today, docs waiting on you — so you can see what needs attention before you click into anything.

See Stat Tiles

Your last five transactions sit under Recently Viewed on the same page. If your office uses Pipeline eSign, the eSign

page is the same kind of list for signatures: every request you have sent, who has signed, and who is holding things up.

Every request you've sent sits in one list, so you can see who has signed and who is holding things up. When the last signature lands, the signed document comes back to Pipeline on its own.

See eSign Requests

2. Shape the Transactions Page Into the Report

The Transactions page is a report you build by narrowing. For one agent's deals closing or closed this year, type the agent into Power Search in the upper-left corner, then open More Search Options and set Close Date to This Year. The list on screen is the report.

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

Two controls decide what the report shows. Sort by any date and that date takes the place of the Close Date column, so a list sorted by listing date shows listing dates. Use [Columns] to show the fields the job runs on and hide the rest.

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

3. Save It, Share It, or Print It

Once the list is right, you have four ways to keep it.

- **Save it as a shortcut.** It sits in your left menu and re-runs fresh each time, and Build the Saved Views Your Office Works From Every Morning shows how to save one.
- **Bookmark the address.** Every search has its own web address. Bookmark it in your browser for the reports that are not worth a shortcut slot, and keep a folder of them.
- **Send the address to a teammate.** Paste the address to another person on your Pipeline account and it opens the same list for them, limited to the transactions they can see.
- **Print it, or save it as a PDF.** Your browser's print command handles both, and Print Exactly What You Need From Pipeline shows how to get the page you shaped onto paper or into a file.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

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

4. Download the Spreadsheet

When the report needs to leave Pipeline, download it. Two choices: [Include only displayed columns] gives you what is on screen, and [Include all transaction columns] gives you every field on those transactions, custom fields included. Agents like the second one because it carries their 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

Before you send any download to an agent, read the column headings. The all-columns file includes fields such as admin info that were never meant for them. Delete those columns first.

The Downloads section of the Transactions page also holds ready-made files: this year, last year, and the Full Spreadsheet of every transaction the account has ever had. The year in a file's name is the year a transaction was added, not the year it closed, so for a closing period, shape your own search instead.

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

See Full Spreadsheet

5. See Who Is Using Pipeline

Usage by Agent, under Reports, shows each person's last login, how many times they logged in, and what they did in the period: docs uploaded, transactions closed, and more. Run it for the last 30, 60, or 90 days, a calendar year, or a range you set. A blank Last Login is someone who has never signed in.

Download the Usage by Agent report to see who's logging in, who's uploading, and who hasn't touched Pipeline at all.

See Usage by Agent

6. Line Up the Years

Comparative Production sets each month against the same month in the years around it. Every section, sales volume, sales average, transactions closed, has a column per year and a row per month, with the variance from the same month a year earlier, and a totals row for each year. Run it company-wide, for one location, or for one agent, over two years by default or as many as you have. Sales figures come from the sale price on each transaction.

See how this year stacks up against last: Comparative Production lines the same month up across several years, so seasonal patterns show themselves.

See Comparative Production

7. Let Agents Pull Their Own Numbers

On the Commission Module, an agent sees their own financial information on each transaction and nothing about anyone else's. The [download] link beside their net payable produces the transaction's Commission & Fees Statement.

The money on a deal lives on the deal. A transaction records what your office expects to earn, and once commissions are entered it shows what each person is owed.

See Commission Info

For the year, an agent clicks the [Gear], then [My Info], then Your Commissions, picks a closing period or a custom range, and downloads a Summary of the totals or a Detailed report with every transaction on its own line.

Agents can pull their own commission figures without asking anyone. It sits in your personal profile, labeled Your Commissions.

See My Commissions Report

To stop the mid-month text altogether, turn on the monthly production summary. A master admin checks Email monthly production summary to agents under [Admin / Settings], Email Settings, and each agent then receives last month's production and the year to date in the first week of every month. Each agent can switch their own copy off under My Info.

Once a month, each agent gets their own numbers by email — last month's production plus the year to date, with nobody having to run a report.

See Monthly Production Summary