Transaction Statuses

Transaction Statuses help your team track the stage of each transaction as it moves through your workflow — from listing to closing and everything in between. You can create custom statuses that match how your office works, automate tasks based on status, and use status categories to power features like expiration dates and monthly backups.

Introduction

Every transaction in Pipeline has a status that reflects its current stage — like **Listed**, **Pending**, **Closed**, or **Expired**. These statuses provide visibility into a transaction's progress and help power features like automation, reporting, and transaction expiration.

Admins can create, rename, or remove statuses to match your team's process. Each status is also assigned a **status category** to enable special behaviors like automatic expiration or inclusion in monthly backups.

How It Works

Each custom status is assigned a category that affects how Pipeline handles it:

- **Active** – for open or in-progress transactions
- **Inactive** – for Closed, Expired, or Fell Through transactions
- **Listing** – required for listings that should auto-expire and appear in commission reports

Benefits

- ⍰ Track each transaction's stage at a glance
- ⚙ Automate task assignments and expiration behavior
- ⍰ Organize and report on transactions more effectively

Best Practices

- **Keep names clear and action-based** (e.g., "In Escrow" vs. "Step 2")
- **Don't duplicate labels or mix with side info** (e.g., avoid "Residential – Pending")
- **Use status categories wisely** to support reports and expiration logic

View Transaction Statuses

Who Can Do This: Master Admins

Go to **Admin / Settings**

Select **[Transaction Statuses]** from the left-side menu

Add a Transaction Status

Click **[Add Status]**

Enter a status name (e.g., "Under Review")

Select a **Status Category** — Active, Inactive, or Listing

Click **[Add Status]** to save

Rename a Transaction Status

Click the **gear icon** next to the status

Select **Edit Status**

Update the name and click **[Save]**

Remove a Transaction Status

Click the **gear icon** next to the status

Select **Deactivate Status**

Click **[Deactivate]** to confirm

Deactivated statuses remain visible on existing transactions but can no longer be applied to new ones.

Use Transaction Statuses

Apply a Status

Open the transaction

Select the correct status from the dropdown

Click **[Save]**

Auto-Assign Checklists

Checklist templates can be automatically assigned based on status.

Go to **Admin / Settings → Checklist Templates**

Select or create a template

Choose a **Status** under the **Auto-Assign If** settings

Filter by Status

To filter transactions by status:

Go to the **Transactions** page

Click **[Filter]**

Select the status you want to view

Click **[Filter Results]**