Transaction Labels

Transaction Labels help your team quickly identify the type of each transaction — like Residential, Commercial, or Rental. They appear on the Transactions List and can be used to automatically assign checklist templates based on the label your office applies.

Introduction

Transaction Labels are used to classify your transactions — most often by property type, like **Residential**, **Commercial**, **Rental**, or **Land & Lot**. Labels appear next to the transaction name, giving your team instant context and helping with sorting, filtering, and automation.

They're especially powerful when used to trigger checklist templates or when label selection is required to complete a transaction.

How It Works

See Your Custom Transaction Labels

Add a Transaction Label

Rename a Transaction Label

Remove a Transaction Label

Use Transaction Labels

Require Transaction Labels

Apply a Label to a Transaction

Auto-Assign Checklists Based on Label

Filter by Transaction Label