Build a Status List That Matches How Your Office Works

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Your status list is the vocabulary your whole office reads a deal in. Getting it right is mostly one decision made repeatedly — which category each status sits in.

Introduction

Statuses are the easiest thing in Pipeline to set up and the easiest thing to set up wrongly, because the part that matters isn't visible on the transaction. Every status you create is filed under a category, and the category is what Pipeline actually reads.

Four separate behaviours hang off that choice: whether the transaction stays on everyone's default list, whether a listing's expiration date works, whether it counts in your financial and inventory reports, and whether agents are allowed to set it. A status named *Closed* filed under the wrong category does none of the things its name implies.

When to Use This

- You're setting up a new account and deciding what your statuses should be.
- Finished deals are still sitting on your agents' active lists.
- A status you created is missing from your reports, or its transactions aren't being backed up.
- You can't enter an expiration date on a listing and don't know why.
- Your status list has grown to thirty entries and nobody picks the right one.

Why the Category Matters More Than the Name

The instinct is to treat the category as filing — a way to group the list tidily — and to put the real meaning in the name. It's backwards. The name is for your team to read; the category is what Pipeline acts on.

The one that catches nearly everybody is **Other**. It sounds like a junk drawer for statuses that don't fit, so that's where a *Lease* or an *Auction* or an *Admin* status ends up — and Other is an *active* category, so every transaction filed there stays on the active list forever and never enters a backup. Nothing about the name warns you.

1. Write Down the Stages, Not the Types

Start on paper. A status is where a deal *is* — listed, under contract, closed, terminated. It is not what the deal *is*: residential, commercial, rental, referral, new construction.

Every status you add is one more thing an agent has to choose correctly, so a short list picked accurately beats a long one picked carelessly. Most offices need fewer than a dozen.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

2. Choose Each Category on Purpose

For every status, ask the four questions before you save it. Should a deal in this state still be on the active list? Is it a listing, with an expiration date to manage? Should it count in your closed-business numbers? And should agents be able to set it themselves?

The answers point at the category. A *Leased* or *Admin File* status belongs under Closed even though nothing was sold, because Closed is what takes it off the list and puts it in the backup. Anything you want expiration handling for has to be under Listing.

Let Pipeline retire a listing on its expiration date, so nothing lingers on your active list past the day the agreement ended.

See Automatic Listing Expiration

> If the symptom you came here with is finished deals cluttering the list, that's this decision showing up in one place. See Keep Your Active Transactions List Clean.

3. Push Classification Down to Labels

The commonest way a status list goes wrong is that it absorbs classification. *Commercial Pending*, *Residential Pending*, *New Construction Pending* — three statuses doing the work of one status and one label, and now every report has to know about all three.

Put the stage in the status and the type in a label. Both show on the Transactions list, both are searchable, and the label can drive which checklist gets applied.

Labels classify your transactions by property type, and they drive the checklists Pipeline auto-assigns.

See Transaction Labels

4. Correct a Status That's in the Wrong Category

A status can't be moved between categories, which surprises people. The fix is a four-step swap and it's well-worn:

To move a status into the right category:

1. Rename the existing status to something temporary, so the name is free.
2. Deactivate it, which takes it out of the dropdown without touching the transactions on it.
3. Create a new status with the real name, under the correct category.
4. Click the transaction count shown next to the deactivated status and move those transactions to the new one.

Renaming is safe on its own, by the way — a rename propagates everywhere in the system automatically, with nothing to update per transaction. It's only the category that requires the swap.

> At real volume — hundreds of transactions on the old status — ask support to move them in bulk rather than clicking through. They'll confirm the fee before doing anything.

5. Decide What Agents May Set

The last piece is who gets to use the list you just built. One company-wide setting decides whether agents can move a transaction into the closed, terminated, and expired statuses, and a per-user permission decides whether they can change status at all.

It's worth knowing before you design the list that this control is by category, not by status — so you can't let agents mark deals as fell through while keeping them out of closed.

Permissions decide what someone can do to a transaction: create it, edit its fields, change its status, or delete it. You set them per user, per location.

See Transaction Permissions