Classify Your Transactions by Type

Last Modified on 09/04/2026 11:15 am EDT

Commercial or residential, lease or sale, new construction or resale — the kind of deal it is, kept separate from where the deal stands. Labels are where that belongs.

Introduction

Two questions get asked of every transaction and they're easy to conflate. *Where is this deal?* is the status: listed, under contract, closed. *What kind of deal is it?* is the label: residential, commercial, land, rental, referral.

Keeping them apart is the single most useful convention in this part of Pipeline. Statuses change constantly and belong to the lifecycle; labels are set once and stay. Mix them and you end up with *Commercial Pending* and *Residential Pending* as separate statuses, which multiplies your list, complicates every search, and still doesn't let you count all your commercial work in one go.

When to Use This

- You're deciding whether Commercial and Residential should be statuses or labels.
- Your broker wants gross commission broken out by transaction type for E&O reporting.
- Different kinds of deals need different checklists and you're applying them by hand.
- Your status list has grown because every property type got its own entry.
- You're about to create a label for listing side and buying side.

Why This Beats Adding More Statuses

The instinct is to put the type in the status, because the status is the thing everyone already looks at. It works for about a month. Then *Commercial* needs a pending version and a closed version, *Land* needs the same, and a list of eight statuses becomes a list of thirty that nobody picks from accurately.

A label sits *beside* the status rather than inside it, so both are visible at once on the Transactions list. Eight statuses and five labels describe forty combinations, and every one of them is searchable, reportable, and able to drive its own checklist.

1. Create a Label for Each Type You Report On

A master admin adds labels in your company settings. The test for whether something deserves one is simple: would you ever want to pull a list of just these? Property type nearly always passes. A one-off note about a deal doesn't.

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

See Transaction Labels

> Keep the names short. Labels share a narrow column with the side indicator on the Transactions list, and a

label called *New Construction — Builder Contract* gets cut off where *New Build* reads cleanly.

2. Leave the Status List Alone

Once labels exist, statuses can go back to being what they are — the stages a deal passes through. If you've been carrying type information in your statuses, this is the moment to strip it out, so *Commercial Pending* and *Residential Pending* collapse back into one *Pending*.

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

See Transaction Statuses

3. Don't Spend a Label on Side

Pipeline figures out whether you're on the listing side, the buying side, or both — automatically.

See Transaction Sides

4. Let Labels Drive the Checklists

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

5. Report on What You've Classified

Labels are searchable and filterable, so a list of every commercial deal this year is one search. They also come through as their own column in downloaded spreadsheets, which is how most offices produce a commission breakdown by type — filter to closed transactions for the period, download, subtotal by the label column.

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

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads