Keep Your Active Transactions List Clean

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Finished deals should drop off your list on their own. If they aren't, the fix isn't the status name — it's the category behind it.

Introduction

Your Transactions page is supposed to show live work. Closed sales, dead contracts, and expired listings are meant to step aside on their own the moment their status changes, leaving you a list you can actually read.

When that doesn't happen, when canceled deals and finished referrals pile up on everyone's list month after month, it's almost never the status you picked. It's the **category** that status was filed under. Pipeline decides what's live by category, and it ignores the name completely. A status called *Canceled* sitting in an active category is, as far as Pipeline is concerned, an active deal.

This is a master admin job, done once. You'll audit which of your statuses are sitting in an active category, rebuild them in the right inactive one, retire the old ones, and move the existing deals across. From then on, finished work leaves the list by itself.

When to Use This

- Canceled, terminated, or withdrawn deals are still showing on your agents' active transaction lists, and nobody can work out why.
- Closed referrals never leave the list, so your dashboard reads busier than your office actually is.
- You made a custom status for finished work — and it changed nothing.
- Your agents keep asking how to hide deals they're no longer working on, and they don't have a setting for it.
- Closings are missing from your commission reports even though the deals are plainly done.

Why This Beats Deleting or Filing Under Other

Most offices land here having already tried the **Other** category. It's a reasonable guess — the deal isn't active, isn't a listing, isn't pending, so *Other* it is. But Other is an **active** category. There are seven categories, four of them active (Active, Listing, Pending, Other) and three inactive (Closed, Fell Through, Auto Expiry), and anything in the first four stays on the list forever no matter what you call it. Filing *Canceled* under Other is the single most common reason a cleanup doesn't take.

The other instinct is to delete the old deals outright, and that one costs you something you can't get back. Deletion is permanent, it takes every document and every bit of history with it, and there's no self-service way to do it in bulk anyway. Recategorizing gets you the same clean list without giving up the record — the deals stay in your account for history, auditing, and reporting, and they roll into your monthly backups. They're out of your way, not gone.

1. Find the Statuses Sitting in an Active Category

Start with the audit, because the answer is usually one or two statuses, not a broken list. Open your Transaction Statuses settings and read the *category* beside each status, ignoring the names entirely.

You're looking for anything that represents finished work but sits in **Active**, **Listing**, **Pending**, or **Other**. In practice it's almost always a custom *Canceled*, *Terminated*, *Withdrawn*, or completed *Referral* status that someone created under Other years ago.

Then decide where each one really belongs. **Closed** is for deals that completed — and it's the category your commission and closing reports read from, so anything that closed needs to be here rather than in a look-alike status of your own. **Fell Through** is for deals that died: canceled, terminated, withdrawn. **Auto Expiry** is for listings that ran out. The names are yours to choose; only these three categories take a transaction off the list.

> Some offices use this deliberately for deals that are only pausing — a custom *On Hold* or *Delayed* status in the Fell Through or Auto Expiry category parks a transaction out of sight without pretending it's finished.

2. Create the Replacement in an Inactive Category

Create a new status from the Transaction Statuses page in your admin settings. Give it the same name your office already uses, and this time choose the inactive category you settled on in step 1.

You're adding rather than editing on purpose. A status carries its whole history with it, so the clean path is a fresh status in the right category alongside the old one — both visible for the moment, which is exactly what you need to move deals across.

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

See Transaction Statuses

3. Deactivate the Old Status

Retire a status you no longer use from the Transaction Statuses page. Do this before you start moving transactions, so nobody files a fresh deal under the wrong one while you work through the backlog.

Deactivating strands nothing. Transactions already using the old status keep it — they just can't be joined by new ones. Once you've moved the last deal off it in step 4, the status has no transactions left and Pipeline removes it entirely, which is the tidy ending you want.

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See Transaction Statuses

4. Move the Existing Transactions Across

The old deals don't follow the status change — they keep whatever status they already had, so they stay on the list until you move each one. This is the part worth setting aside real time for.

Pull them up as a group first, then work the list. To move your existing transactions to the new status:

1. Click [Transactions] from the top menu.
2. Search for the old status so you're looking at exactly the deals that need moving.
3. Click the [gear] next to a transaction, then [Edit].
4. Change the Status dropdown to your new status, and save.
5. Repeat for each transaction in the list.

As each one lands in an inactive category it drops off the active list. When the list empties, you're done — and it stays done.

> There's no self-service way to change status in bulk, so a long backlog is a real afternoon. If yours runs to hundreds or thousands of transactions, our team can move them for you by rule — for example, everything in *Pending* created before a given date. It's a paid service quoted per job, and the request has to come from your master admin. Tell us the current status and the cutoff date and we'll price it.

> Moving a deal to an inactive status doesn't touch its checklists. Its tasks keep their due dates, keep appearing on the Tasks page, and keep sending reminder emails — by design, since compliance paperwork can outlive the deal. Clearing them is a separate job: see Clear the Decks When a Deal Falls Through.

5. Find a Finished Deal When You Need It

Nothing you just did deleted anything, and the first time a deal vanishes from the list it's worth knowing that in your bones. Every transaction you moved is still in your account, still complete, still reportable — it's not on the default view anymore.

Searching from the page spans every status, so a closed deal comes back the moment you look for it, and filtering to a status pulls up a whole set at once.

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

[View All] drops the active-only filter and shows everything, closed deals included.

The Transactions page lists every transaction you have access to — shaped by the columns you pick, the order you sort, and the scope you set.

See Transactions List

> By default your agents can move a deal along only as far as Pending — closing and terminating are admin

> work. If you'd rather agents finish their own deals, a company setting under Transaction Settings allows it: "Allow agents to change transaction status to closed, terminated, and expired."