Transaction Labels FAQ

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Labels mark property type, drive auto-assigned checklists, and there's one per transaction. Answers to the common questions about multiple labels, changing a label after saving, and requiring one.

Can a transaction have more than one label?

No — one label per transaction. Pick the property type that fits best. If you need to slice transactions more than one way, a custom list field can capture a second dimension alongside the label.

How do I change a label after the transaction is saved?

Edit the transaction and choose a different label. An admin can change the label in any status. An agent can only update the label on transactions they created, and only while the transaction is in an Active or Listing status.

What's the difference between a label and a status?

A label is the property type; a status is the stage. Use labels for residential, commercial, or rental, and statuses for listed, pending, or closed. If you're tracking property type with a status today, we recommend switching to labels.

Can I require a label on every transaction?

Yes. Check [Require Transaction Label] in your company settings and no transaction can be saved without one — useful when checklists auto-assign by label.

Who can create or edit labels?

The master admin. Label setup lives in the Customize section of your admin settings, so your list stays consistent across the whole company.

Do labels really assign checklists automatically?

Yes. You can set a checklist template to attach automatically whenever a transaction gets a certain label, so the right tasks land on each property type without anyone remembering to add them.

Learn More

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

See Transaction Labels

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.