Transaction Labels

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

Introduction

A residential closing and a commercial lease need different paperwork, and the person opening the file shouldn't have to remember which. That's the job a label does.

A label says what kind of deal a transaction is, in your office's own vocabulary, set up once for the whole company. It sounds like a filing convenience, and it's more than that, because the label is one of the things Pipeline reads when it works out which checklist a new transaction should get. Say residential as you create the file and the residential checklist arrives with it. So the label isn't only describing the deal. It's steering what happens to it.

Your list reads at a glance, your reports break down by property type, and the right tasks land on the right deals without anybody assigning them. A transaction carries one label at a time, which is worth knowing while you're designing the list. Keep a label to the kind of property and let a status carry where the deal stands; the accounts that mix the two are the ones where neither ends up meaning much.

How It Works

Labels describe the type of property, they power auto-assigned checklists, and each transaction carries exactly one.

Labels vs. Statuses

A label is the *type* of transaction; a status is its *stage*. Keep them separate — if you're using a status to track property type, switch that job over to labels instead.

What Labels Unlock

Once transactions are labeled, you can auto-assign checklist templates by label, see each property type at a glance on your Transactions List, and filter or download reports and search results by type.

One Label Per Transaction

A transaction carries a single label at a time. Choose the property type that fits best; a transaction can't hold two labels at once.

Applying a Label

When adding or editing a transaction, pick the label from the [Label] dropdown and save. Whether an agent can change a label later depends on the transaction's status and their permissions.

Add a Transaction Label

> Create a new label from the Transaction Labels page in your admin settings.

> **Who Can Do This**: The master admin.

To add a transaction label:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Transaction Labels] from the Customize section of the left menu.
3. Click [Add Label].
4. Enter the label name.
5. Click [Add Label] to save it.

The new label is now available in the [Label] dropdown on every transaction.

Rename a Transaction Label

> Update the name of an existing label from the Transaction Labels page.

> **Who Can Do This**: The master admin.

To rename a transaction label:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Transaction Labels] from the Customize section of the left menu.
3. Click the [gear] to the right of the label, then [Rename].
4. Enter the new name and click [Save].
5. If the label is already on transactions, choose [Yes] to update all of them or [No] to leave the old name in place.

The label's new name appears wherever you chose to apply it.

Delete a Transaction Label

Remove a label you no longer use from the Transaction Labels page.

Who Can Do This: The master admin.

To delete a transaction label:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Transaction Labels] from the Customize section of the left menu.
3. Click the [gear] to the right of the label, then [Remove].
4. Click [remove] again to confirm.

The label is removed from your list and no longer available to apply.

Require a Transaction Label

Make a label mandatory on every transaction from your company settings.

Who Can Do This: The master admin.

To require a transaction label:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. In the Transaction Settings section, check the box next to [Require Transaction Label].
3. Click [Save Settings].

From now on, no transaction can be saved without a label — handy when you're auto-assigning checklists by label and want every deal covered.

Let the Label Bring the Checklist

Offices tend to meet this connection the hard way — they rename a label, and the checklists quietly stop arriving. The link between the two is a rule that lives on the checklist template, not on the label, which is why renaming here can break something over there.

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

Transaction Labels FAQ

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. See Transaction Labels FAQ.