Transaction Statuses FAQ

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

Statuses are customizable, grouped into categories, and controlled by the master admin. Answers to the common questions about who can change them, hiding statuses from agents, and monthly backups.

Who can create or change transaction statuses?

Only the master admin. Agents and other admins can apply an existing status to a transaction (with permission), but adding, editing, and deactivating the status list itself is the master admin's job.

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

A status is the stage; a label is the type. Use statuses for where a deal is in its lifecycle (listed, pending, closed) and labels for what kind of property it is (residential, commercial). Keeping them separate avoids clutter and confusing reports.

Can I stop agents from closing or terminating transactions?

Yes, with a company setting. Uncheck "Allow agents to change transaction status to closed, terminated, and expired" in your admin settings, and only admins can move a transaction into those statuses.

Can I hide certain statuses from agents?

Not today. Every active status shows in the dropdown for anyone with permission to change status. Some offices label staff-only statuses clearly (for example, "STAFF ONLY — Review") so agents know to leave them alone. If this would help your workflow, tell us at help@paperlesspipeline.com.

What happens to transactions when I deactivate a status?

They keep the status; it just can't be applied to anything new. Existing transactions are untouched. If no transactions are using the status when you deactivate it, Pipeline removes it entirely.

Which statuses get backed up in the monthly backup?

The inactive ones. Transactions in a Closed, Fell Through, or Expiry category status are included in your next monthly backup and drop off your default transaction lists.

How do I change a transaction's status?

Edit the transaction and pick a new status. Agents need the "Change transaction status" permission, and closed or terminated statuses depend on the company setting above.

Learn More

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

See Transaction Statuses

Still Have Questions?

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