Transaction Statuses

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

Introduction

Somebody asks where a deal stands, and you shouldn't have to open it to answer. That's the job a status does, and it's why the status is the one field on a transaction that everybody reads.

A status is the stage a deal is in, and your office writes its own list, because "pending" means something slightly different in every market and the words your team already uses are the words they get right. What isn't yours to name is the category behind each status. Every status belongs to one of a fixed set, and it's the category rather than the name that tells Pipeline whether a deal is still live. That's the part to understand before you build the list, because a status can be called anything at all and still sit in a category that keeps it on your active work.

So the Transactions list stays a working list rather than an archive, and everyone reads a file the same way. And if a deal drops out of that list the moment you mark it closed or fell through, nothing has gone wrong. It's off the live view by design and still in the account, waiting where finished work waits.

How It Works

A Status Is the Stage, a Label Is the Type

A status is where the deal is: listed, pending, closed. A label is what kind of deal it is: residential, commercial, rental. Keeping them apart matters, because a status like "Commercial Pending" mixes the two and stops either one being reportable.

The Category Decides, Not the Name

You name your own statuses, but every one sits in a category Pipeline ships, and those seven can't be renamed or added to. The category, not the name, tells Pipeline whether a deal is still live: four keep it on your working list, three take it off, out of your default lists and into your next monthly backup.

Category	The deal reads as	Worth knowing
Active	Live	
Listing	Live	Also enables automatic expiration dates, and decides which transactions reach the Commission Summary report.
Pending	Live	
Other	Live	The name reads like a junk drawer, but a Canceled or Withdrawn status filed here stays on your active work no matter what you called it.
Closed	Finished	
Fell Through	Finished	
Auto Expiry	Finished	

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.

See Keep Your Active Transactions List Clean

When You Need to Change One

You pick a status's category when you create it, and it's fixed from then on, so editing a status that sits in *Other* won't move it. To change one, create a new status in the category you want, deactivate the old one, and re-status those transactions one at a time; there's no bulk status change in the product.

Changing a transaction's status leaves its checklists alone, deliberately: compliance tasks often still need finishing after a deal closes or dies, so they carry on appearing until someone clears them. Nothing stops a transaction being marked Closed with its closing date still ahead, and nobody is notified when a status changes.

Add a New Status

> Create a new status from the Transaction Statuses page in your admin settings.

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

To add a new status:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Transaction Statuses] from the left menu.
3. Click [Add Status].
4. Type the status name and choose a category.
5. Click [Add Status] to save it.

You can now apply the new status to any transaction.

Put a Status in a Different Category

A status in the wrong category keeps closed deals on your active lists, and renaming it doesn't move it. There's no way to change the category on a status that already exists, so the route is to replace it.

To move a status to a different category:

1. Create a new status with the same name under the category you want.
2. Deactivate the old status so nobody picks it again.
3. Re-status the transactions still carrying the old one.

Edit a Status

> Rename a status from the Transaction Statuses page. Its category is fixed when the status is created and can't be moved afterwards.

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

To edit a status:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Transaction Statuses] from the left menu.

3. Click the [gear] next to the status you want to change, then [Edit Status].

4. Make your changes.

5. Click [Save].

Your update applies to every transaction already carrying the status.

Deactivate a Status

> Retire a status you no longer use from the Transaction Statuses page.

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

To deactivate a status:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Click [Transaction Statuses] from the left menu.

3. Click the [gear] next to the status, then [Deactivate Status].

4. Click [Deactivate] to confirm.

Transactions already using the status keep it, but you can't apply it to new ones. If no transactions are using it, Pipeline removes the status entirely.

Let Agents Set Closed, Terminated, and Expired Statuses

> Decide company-wide whether agents can move transactions into closed, terminated, and expired statuses.

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

To let agents set closed, terminated, and expired statuses:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Find the setting "Allow agents to change transaction status to closed, terminated, and expired."

3. Check the box to let agents do this, or uncheck it to reserve those statuses for admins.

4. Click [Save Settings].

When it's unchecked, agents with permission to change status can still update everyday statuses, but only admins can close and terminate transactions.

Let Listings Retire Themselves

Putting a status in the Listing category does one more thing than keep the deal active: it opts that status into expiring on its own. Worth choosing on purpose, because an office that doesn't know about it meets the behavior as a listing that went inactive by itself.

Let Pipeline retire a listing on its expiration date, so nothing lingers on your active list past the day the agreement ended.

See Automatic Listing Expiration

Transaction Statuses FAQ

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. See Transaction Statuses FAQ.

Ways to Use Transaction Statuses

See Transaction Statuses at work inside a bigger job:

- Keep Your Active Transactions List Clean