Creating and Using Custom Transaction Labels

SUMMARY

Learn how to set up and optimize your company's *Transaction Labels* and other settings related to *Transaction Labels.*

IN THIS ARTICLE

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Introduction

Transaction Labels allow you to classify your transactions and typically represent the property type of a transaction (e.g., Residential, Commercial, Land and Lot, Rental, and Condo, etc.).

Transaction Labels play a critical role in *Auto-assigning Checklist Templates* and ensuring the appropriate tasks are added to transactions based on their property type.

The main benefits of using *Transaction Labels* include the ability to:

- Automatically assign checklists to transactions based on property type and other criteria.
- View a transaction's property type at-a-glance on the *Transactions List* .
- Filter and download reports and search results based on property type.

Who Can Do This?

Only master admins can complete the full setup of Commission Module.

Video

🕓 1:50

Set Up Transaction Labels

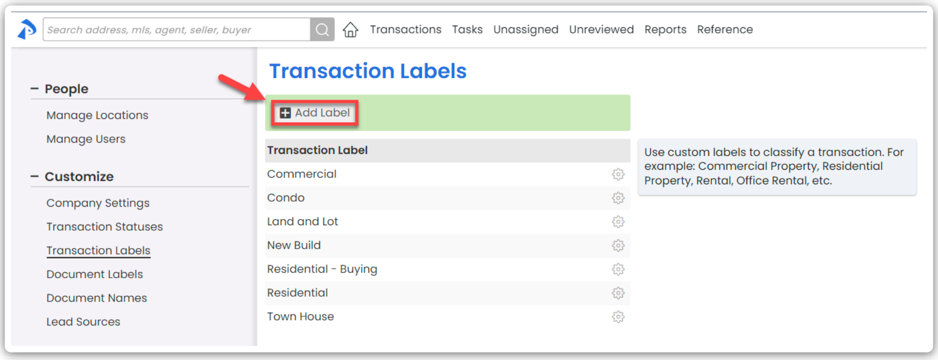
To set up *Transaction Labels*:

1. **Go to Admin / Settings** by clicking your name in the upper-right, then [Admin / Settings].
2. **Click [Transaction Labels]** from the *Customize* section of the left menu.

Add a Transaction Label

To add a *Transaction Label*:

1. From the *Transaction Labels* area in Admin / Settings, **click [Add Label].**

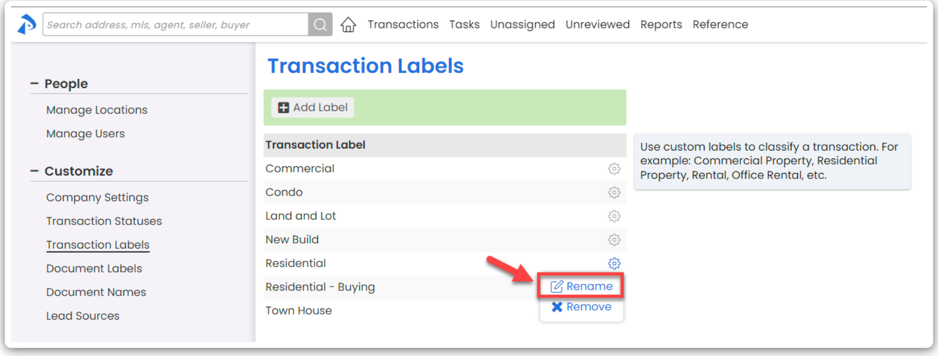


2. **Enter the *Label Name*.**
3. **Click [Add Label]** to save the new label.

Edit a Transaction Label

To edit an existing *Transaction Label*:

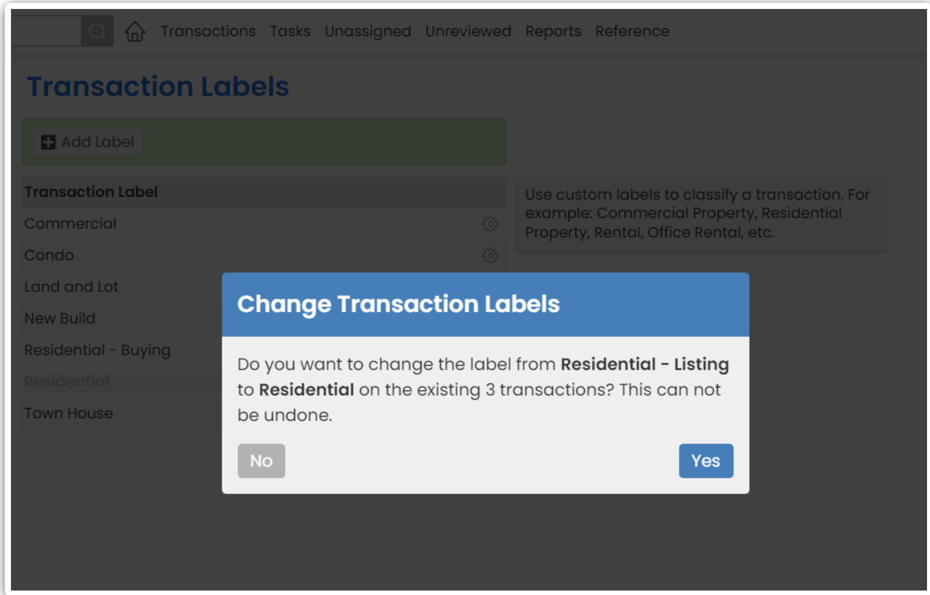
1. From the *Transaction Labels* area in Admin / Settings, **click the [⚙] to the right of the label, then [Rename].**



2. **Enter the new *Label Name*.**

3. **Click [Save]** to update the label.

4. If the original *Transaction Label* is applied to any existing transactions, Pipeline will give you the option to change the *Transaction Label* of those existing transactions.



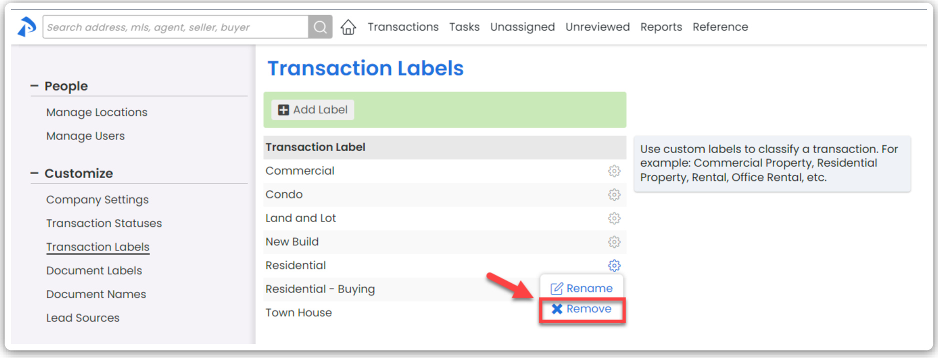
- To update the *Transaction Label* on transactions where the original label is applied, **select [Yes].** Pipeline will confirm the number of transactions updated.

- To leave the original label on transactions, **select [No].** The original label will remain on transactions where it was already applied.

Delete a Transaction Label

To delete a *Transaction Label*:

1. From the *Transaction Labels* area in Admin / Settings, **click the [⚙] to the right of the label, then [Remove].**



2. **Click [remove] again** to confirm the deletion.

Other Transaction Label Settings

Require Transaction Label (Company Settings)

You may set your account to require a *Transaction Label* on all transactions. By default, a *Transaction Label* is not required on transactions.

To require a label on all transactions:

1. **Go to** Admin / Settings by clicking your name in the upper-right, then [Admin / Settings].
2. From the section for *Transaction Settings*, **check the box next to [Require Transaction Label].**
3. **Click [Save Settings].**

> Requiring a *Transaction Label* is especially helpful when you've set up *Auto-Assigning Checklist Templates* based on *Transaction Label* and want to ensure the proper *Checklist Template* is added to all transactions. Learn about other Company Settings →

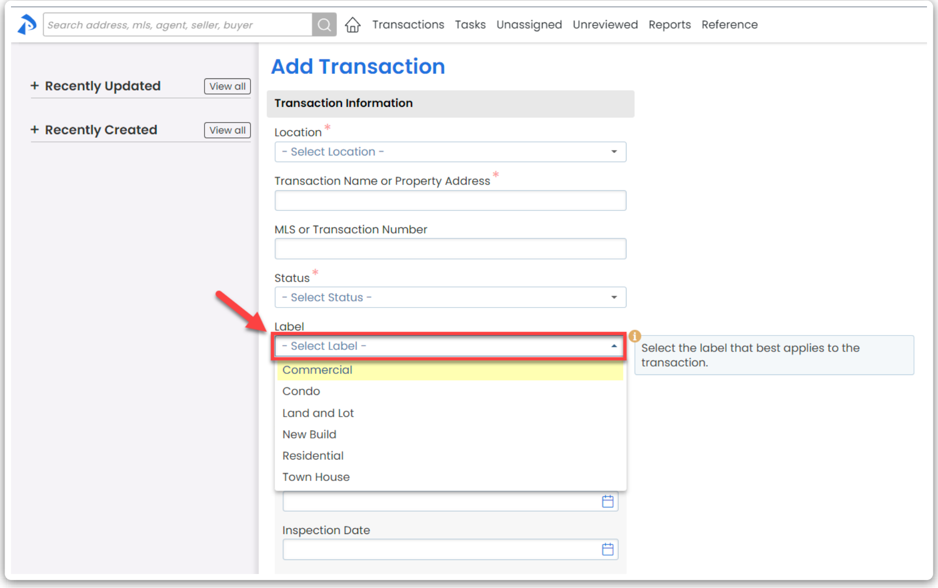
Auto-Assign Checklists Based on Transaction Label (Checklist Templates)

Checklists can be set to automatically assign to transactions based on a transaction's label. Learn how to Automatically Assign Checklist Templates to Transactions →

Apply a Transaction Label to a Transaction

To apply a label to a transaction:

1. When adding or editing a transaction, **click the [Label] dropdown.**



2 **Select your desired label** for the transaction.

3 **Click [Add Transaction] or [Save].**

If you currently use the *Transaction Status* to classify the property type, we strongly recommend using *Transaction Labels* instead.

Pipeline Pro Webinar Recording: The Hidden Benefits of Transaction Labels

This webinar covers how *Transaction Labels* help make your workflow more efficient in areas you may not realize. When used correctly, *Transaction Labels* are a huge time saver and essential for simplifying and automating your account.

View more Paperless Pipeline Pro Webinars here →

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