

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*.

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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

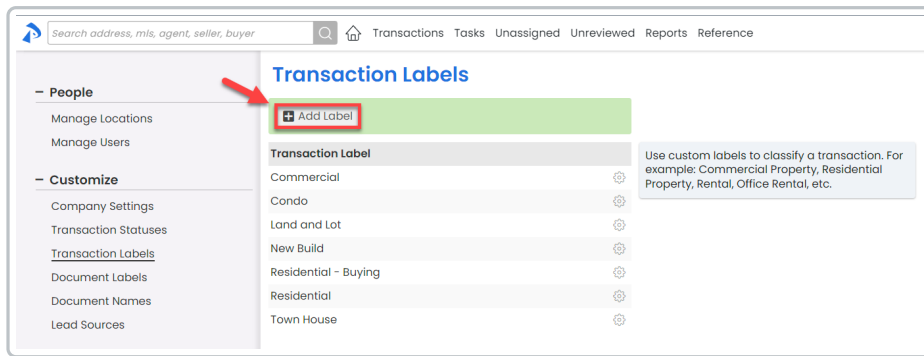
To set up *Transaction Labels*:

- 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 [\[Add Label\]](#).

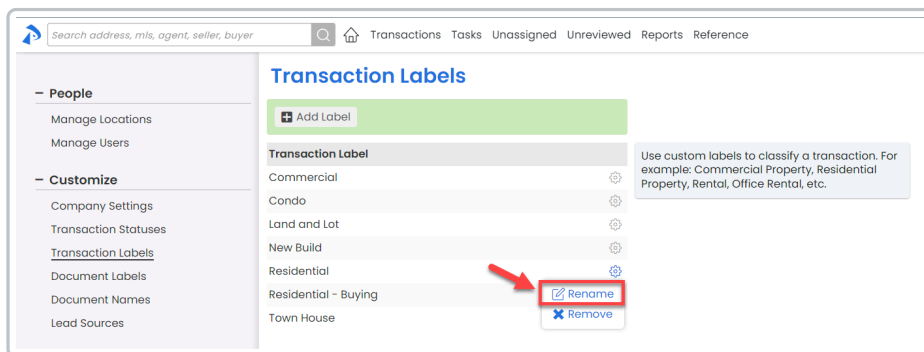


- 2 Enter the *Label Name*.
- 3 Click [Add Label] to save the new label.

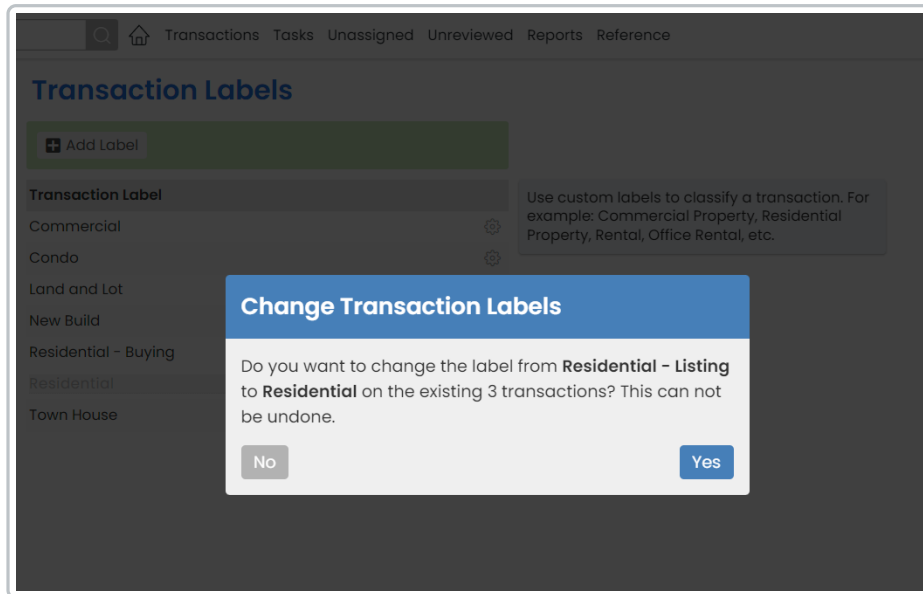
Edit a Transaction Label

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.

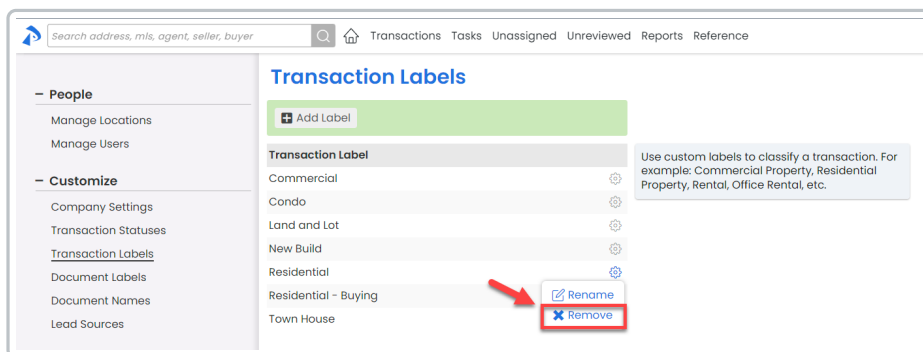


- To update the *Transaction Label* on transactions where the original label is applied, select [Yes]. Pipeline will confirm the number of transactions updated.
- To leave the original label on transactions, select [No]. The original label will remain on transactions where it was already applied.

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 →](#)

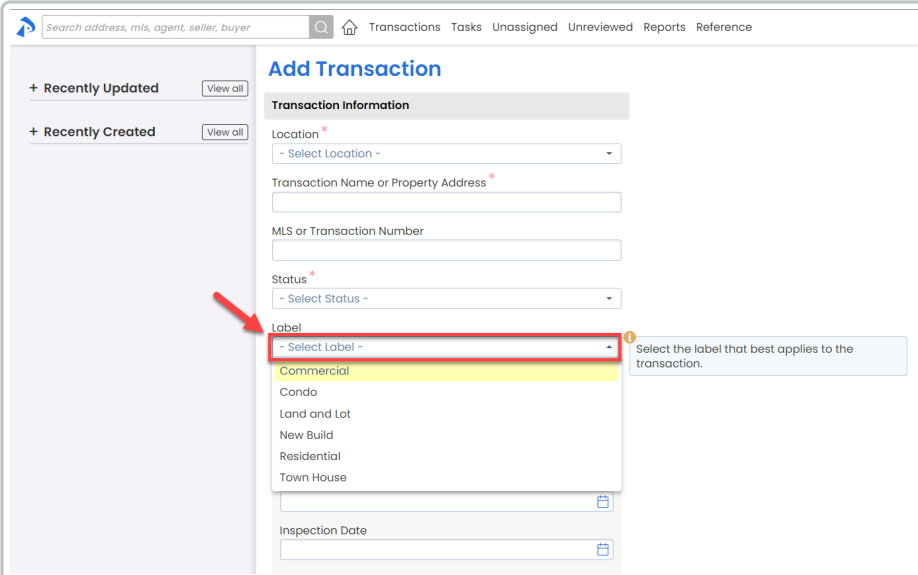
Auto-Assign Checklists Based on Transaction Label (Checklist Templates)

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.



The screenshot shows the 'Add Transaction' form in a web application. The form is titled 'Add Transaction' and has a search bar at the top left with the placeholder text 'Search address, mls, agent, seller, buyer'. The form is divided into sections: 'Transaction Information', 'Transaction Name or Property Address', 'MLS or Transaction Number', 'Status', 'Label', and 'Inspection Date'. The 'Label' dropdown menu is open, showing a list of options: 'Commercial', 'Condo', 'Land and Lot', 'New Build', 'Residential', and 'Town House'. A red arrow points to the 'Label' dropdown menu. A tooltip next to the dropdown menu says 'Select the label that best applies to the transaction.'

- 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.

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