Expiring & Closing Reminders

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Expiring & Closing Reminders help your team stay on top of important deadlines by sending automatic email notifications about transactions that are set to expire or close soon. These reminders give agents and admins a heads-up without needing to monitor every deal manually.

Introduction

Pipeline automatically sends out email reminders to agents for two key deadlines:

- **Listing Expiration Date**
- **Closing Date**

When enabled, these reminders are emailed out ahead of the deadline to help your team take timely action — whether that's renewing a listing, completing a final checklist, or following up with clients.

How It Works

Reminders are based on the expiration or closing date listed on the transaction and are only sent when certain criteria are met:

- The transaction must have an upcoming **Closing Date** or **Listing Expiration Date**
- Pipeline checks these dates daily and sends reminders in advance
- The reminders are emailed to the assigned agents

Enable or Disable Reminders

Who Can Do This: Master Admins

Go to **Admin / Settings**

Select **[Reminders]** from the left-side menu

Enable or disable:

- **Listing Expiration Reminders**
- **Closing Date Reminders**

Click **[Save]**

Email Recipients

Reminder emails are sent to:

- Agents assigned to the transaction
- Any additional recipients if configured by your team

What the Reminder Includes

The reminder email typically contains:

- Transaction name and property details
- Reminder type (expiration or closing)
- The relevant date
- A link to open the transaction in Pipeline

Best Practices

- **Make sure expiration and closing dates are always filled in** when creating or editing a transaction
- **Remind agents to watch for the emails** — they help avoid last-minute surprises
- **Review your reminder timing and messaging** regularly to make sure it fits your workflow