

Manage Key Dates

SUMMARY

Learn how to use *Key Dates* to designate tasks in your *Checklist Templates* as important timeline dates that can be displayed on your transaction coversheets, synced to your calendar app, and autofilled into emails and message templates.

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Introduction

Checklists Tasks help you track required documents, to-do items, and important dates. Designating tasks as *Key Dates* in Paperless Pipeline allows you to take advantage of added features such as:

- Including a timeline of *Key Dates* on transaction coversheets
- Smartly syncing only *Key Dates* to your calendar app
- Easily inserting a transaction's *Key Dates* into emails using a simple autofill tag

Who Can Do This?

Admins with permissions to "Fully manage checklists and templates" may designate a task as a *Key Date*.

How To

Designate a Task on a Checklist Template as a Key Date

To designate a task on a *Checklist Template* as a *Key Date*:

- 1 Add a new *Checklist Template* or edit an existing one. [Learn how to Manage Checklist](#)

[Templates →](#)

- 2 Click the [key] next to the task you would like to designate as an important **Key Date**. Once the **Key Date** is enabled, the task's key will turn blue.

← Go back to Checklists

— People

- Manage Locations
- Manage Users

— Customize

- Company Settings
- Transaction Statuses
- Transaction Labels
- Document Labels
- Document Names
- Lead Sources

— Templates

- Business Holidays
- Checklists
- Break Apart Docs

— Financials

Edit 1 - Listing ⓘ

Checklist Template Information

Location *
Paperless Real Estate

Checklist Name *
Listing

☒ **Automatically apply this checklist to transactions**

Based on Status: Listed Based on Label: - select a label -

Based on Side: Any

☐ Automatically apply to transactions in all locations

Document Names or Tasks to Track ⓘ

Listing Agreement	↑	📅	🔑	Due on Listing Date Visible to listing agents
Seller's property disclosure	↑	📅	🔑	Due on Listing Date Visible to listing agents
Agency Disclosure	↑	📅	🔑	Visible to listing agents
Lead based paint addendum (if applicable)	↑	📅	🔑	Due on Listing Date Visible to listing agents

- 3 Click [Save Template] to save your updates.

Automatically Include Key Dates on Coversheet

Optionally, **Key Dates** can be automatically displayed on transaction coversheets in a **Transaction Key Dates and Milestones** section. Both incomplete and completed **Key Dates** will be displayed.

To display **Key Dates** on your transaction coversheets:

- 1 Go to Admin / Settings
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 Select the checkbox next to [Include key dates on coversheet]
- 3 Click [Save Settings] to save your updates.

Here is an example of **Key Dates** included on a transaction coversheet:

Transaction Key Dates and Milestones	
11/24/24	Obtain Executed Contract
11/25/24	Send Escrow copy of Fully Ratified PA
11/27/24	Send Survey & T47 to Buyer
11/29/24	Earnest Money Due
12/3/24	Inspection Due Date
12/3/24	Inspection Report Due
12/3/24	Third Party Financing Deadline
12/8/24	Option Period End Date
12/11/24	Buyer to Acquire Property Insurance
1/3/22	Final Walk Through
1/4/22	Closing Date

Listing Agents	
John Smith / ABC Realty	(outside / co-op) E: john@example.com

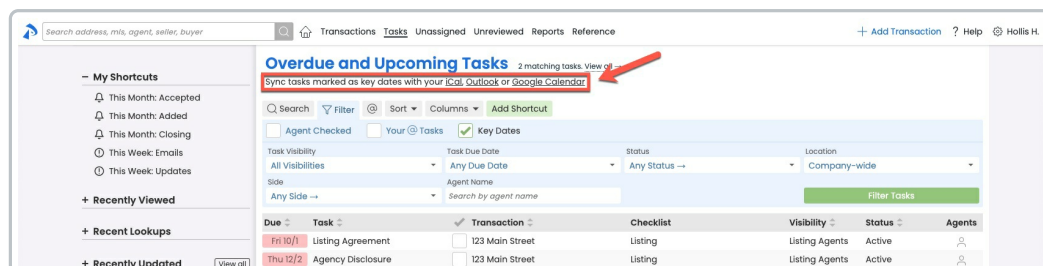
Selling Agents	
Quincy Grosso	E: quincy@example.com

Sync Key Dates to Calendar

To keep track of *Key Dates* in your calendar app outside of Pipeline, sync *Key Dates* to your preferred calendar.

To sync *Key Date* tasks to your calendar:

- 1 On the Tasks page, filter tasks by *Key Date*. [Learn how to Filter Tasks by Key Date →](#)
- 2 Once your list of *Key Date* tasks appear, select the link for your desired calendar app. [Learn how to Sync and Unsync Tasks with Calendars →](#)



Autofill Key Dates into Emails and Message Templates

Use the `{{key dates}}` *Autofill Tag* to quickly share a transaction's important key dates and automatically insert them into emails and message templates. [Learn how to Use Autofill Tags →](#)

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

123 Main Street Added on Oct 6, 2021 by Hollis Holcomb
Last updated 1 minute ago by Hollis Holcomb

Listing Agents

Robert Zimmerman hollis+agentrz@paperlesspipeline.com 202-555-0183

Note / Email Add Contact Merge Docs Upload Docs Search Docs

Email this message to:

☐ Listing agents ☐ Staff (1)

☐ Robert Zimmerman ☐ Hollis Holcomb

Send to an external email address

Enter email addresses

Subject Enter subject

Add autofill tag Message Templates

Choose a saved message template

Message Audio Message

Hi {{agent first names}},

****Congratulations on your new listing!** Here are some important dates coming up:**

Options

☐ Make this note private (in Notes & Sent Emails below)

☐ Append **incomplete** tasks to message

☐ Send me a BCC (blind copy) of the message

☐ Append **overdue** tasks to message

☐ Save this message as a reusable template

Cancel

Preview Message Add Note

Attached Docs

☐ Send docs as zip file link

☐ Attach this transaction's coversheet

Check the yellow boxes below for docs you want to email.

Choose an autofill tag:

- expiration date
- inspection date
- key dates
- label
- list price
- listing agent first names
- listing agent full names
- listing date
- loan approval date

When you use the **Key Dates** tag, both complete and incomplete tasks designated as **Key Dates** from your transaction's checklist(s) will replace the `{{key dates}}` tag.

Message Audio Message Add autofill tag

Preview Message

Hi Robert,

Congratulations on your new listing! Here are some important dates coming up:

- [] Agency Disclosure - Thu, Dec 16, 2021
- [] Listing Agreement - Thu, Jan 20, 2022

Autofill tag help Formatting tips