Closing & Expiration Reminders FAQ

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Closing and expiration reminders are a single account-wide switch that emails agents five days before a close or a listing expiration. Answers to the common questions about timing, opting out, and what shows up inside them.

When does the reminder go out?

Five days ahead. Five days before the transaction's **Close Date**, and five days before a listing's **Expiration Date**.

Can I change the five days?

No — the lead time is fixed. When you need a different one, put a checklist task on the transaction with a due date set relative to the Close Date or Expiration Date. That task then turns up in the daily task reminder exactly when you want it.

Can one person opt out?

No. This is one account-wide setting with no per-user version and no unsubscribe link. Either it's off for the whole office, or the individual filters the messages in their own inbox.

If a user's daily task reminders are off, do they still get these?

Yes. The two are separate controls — the daily task reminder is per-user, and closing and expiration reminders are account-wide.

Why is an agent seeing admin-only tasks in their reminder?

Task visibility is letting them through. The reminder lists the incomplete tasks that agent is allowed to see, so a task set to be visible to anyone appears even when it was written for admins. Set those tasks to be visible to admins on the checklist template — tasks already added to active transactions have to be updated one at a time.

Can I edit the wording of the reminder?

No, it's system-generated. If you'd rather send your own version, turn the reminder off and schedule a message from a reusable template.

Can I turn the reminder on for just one transaction?

No — it's all or nothing. The setting covers every transaction in the account. For a one-off, use a scheduled message or a checklist task on that transaction instead.

Who can turn these on or off?

Master admins. The switch lives in *Admin / Settings*, under *Email Settings*.

Learn More

Five days before a transaction is set to close or a listing is set to expire, Pipeline emails the agent a heads-up — automatically, across the whole account.

See Closing & Expiration Reminders

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.