Closing & Expiration Reminders

Last Modified on 11/10/2026 12:26 pm EST

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.

Introduction

Five days out from a closing, a file is either ready or it isn't, and finding out on the day is too late to do much about it. Somebody usually ends up chasing agents by hand about the deals that are nearly there.

These reminders do that chasing. Pipeline emails the agent five days ahead of a transaction's **Close Date** or a listing's **Expiration Date**, with what's still open on their file, and it does it across every transaction in the account rather than deal by deal. It's one switch for the whole office instead of a per-agent preference, which is what makes it consistent and also what makes it all or nothing.

The agent hears about the file while there's still time to do something about it, on every deal, without anyone on your team keeping a list. It's the one automatic email with no personal opt-out, so if a single person would rather not have them, filtering them in their own inbox is a gentler answer than switching them off for everybody.

How It Works

A company setting, a fixed five-day lead time, and a reminder built from the transaction the agent can already see.

When It Sends

Five days before the **Close Date** for a closing, and five days before the **Expiration Date** for a listing. The lead time isn't adjustable.

What's in the Reminder

The transaction, plus the incomplete tasks on it that the agent is allowed to see. Task visibility decides that — a task visible to anyone appears in an agent's reminder even if it was written for admins.

One Switch, Whole Account

There's no per-user version of this setting and no unsubscribe link in the email. It's independent of the daily task reminder, too: switching that off for someone doesn't stop their closing and expiration reminders.

If You Need a Different Lead Time

You can't change the five days, but a checklist task with a due date set relative to the Close Date or Expiration Date lands whenever you want it to — and it shows up in the daily task reminder.

The Wording Is Fixed

Pipeline writes the reminder, so you can't edit its wording. Want to send your own version instead? Turn the reminder off and schedule a message from a reusable template.

Turn Closing and Expiration Reminders On or Off

Switch the automatic five-day reminders on or off for every agent in the account.

Who Can Do This: Master admins.

To turn closing and expiration reminders on or off:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to *Email Settings*.
3. Check **Email agents expiring and closing transaction reminders** to turn reminders on, or uncheck it to turn them off.
4. Click [Save Settings].

Reminders start — or stop — for every agent in the account from that point on.

Get a Longer Run-Up Than Five Days

Five days is the whole notice period and it doesn't move. When a deadline needs chasing further out than that, the extra warning has to come from somewhere else — and a checklist task carries its own deadline, counted from the same closing or expiration date this reminder reads.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

Say It in Your Own Words

Pipeline writes the wording, subject line included, and some offices would rather their agents heard this from a person than from the software. Writing your own version means switching this one off and building the message yourself, so it goes out under your name and says what you'd say.

Set a message to send itself later — on a date the transaction supplies, when a task gets checked off, or at a time you pick.

See Message Scheduling

Frequently Asked Questions

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.