Build a Contract-to-Close Timeline That Calculates Itself

Last Modified on 09/04/2026 11:05 am EDT

Write your deadlines once as intervals instead of dates, and every new transaction lays out its own timeline — recalculating the moment a real date lands on the file.

Introduction

Every deal your office runs has the same spine. Acceptance, then the inspection window. Financing, appraisal, the final walkthrough, close. The dates change on every transaction; the *intervals* almost never do. Ten days for inspection is ten days for inspection whether the contract signed in March or in September.

That's the thing worth automating. Instead of typing a date onto each task on each deal, you write the interval once on a checklist template: three days after Acceptance, seven days before Close. Then you tell Pipeline which date to count from. From then on the arithmetic is Pipeline's job, on every transaction the checklist touches, and it redoes it whenever the underlying date moves.

An admin builds this on the templates the office already uses. What the agents see is a file that opens with its own deadlines already on it, and a reminder email that arrives on the right morning without anyone having set one.

When to Use This

- You type the same set of contingency dates onto every new transaction by hand.
- The closing date isn't known until a week or two in, so a fixed reminder date never works.
- A closing moved and you spent the afternoon correcting every date that depended on it.
- Your office counts deadlines in business days and you keep having to step over holidays yourself.
- The milestone your deadlines hang off isn't one of the dates Pipeline ships with.

Why This Works Before You Know the Close Date

The reason offices give up on automated deadlines is almost always the same one: the date that everything hangs off doesn't exist yet. A contract goes under agreement on Monday and nobody knows the closing until the lender says so, sometimes two weeks in. A reminder scheduled for a date you don't have is a reminder you can't set, so people go back to typing dates by hand and hoping someone remembers to revisit them.

A relative due date sidesteps that entirely, because it isn't a date — it's a rule. *Seven days before Close* can sit on a task for a fortnight with nothing to show, waiting. The day someone finally enters the close date, every task counting from it fills in at once, correctly, including the ones already sitting on transactions that started weeks ago. Then when the closing slips, they all move again. You're never re-dating anything; you're editing one field and letting the rest follow.

1. Put the Deadlines on a Checklist Template

Build the timeline where it can be reused — on a checklist template, one task per deadline, named for the action rather than for the date. *Order Inspection*, *Financing Contingency Expires*, *Send Closing Package*. This is the piece that turns one office's process into something every deal inherits.

Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.

See Adding a Checklist Template

2. Anchor Each Deadline to a Date the Transaction Carries

Now decide, task by task, which date it counts from. Acceptance for the early contingencies, Close for everything at the back end, Listing or Expiration for the listing side. Two of the anchors need no one to type them at all — Transaction Creation and Checklist Addition start their clocks on their own, which is how a brand-new file gets a deadline before a single contract date exists.

Pick the date a deadline counts from, and Pipeline works the rest out on every transaction — for task due dates and scheduled messages alike.

See Trigger Dates

> Nothing counts from another task. If a deadline needs to move when an earlier milestone moves, the earlier milestone needs a date field of its own — which is the next step.

3. Add an Anchor for the Milestone Pipeline Doesn't Ship

Offices count from things Pipeline has never heard of: a feasibility deadline, a lease end date, a compliance cutoff, a due-diligence expiry. You don't have to bend one of the built-in dates to fit. Create the field, mark it as a trigger date, and it joins the list your rules can count from — so the day someone enters it on a transaction, every task hanging off it dates itself.

Build your own transaction fields to capture the data Pipeline doesn't already track.

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See Custom Fields

4. Write the Rule and Pick How the Days Count

With the anchor chosen, the rule is the easy part: how many days, which direction, counted how. Stack as many as the deal needs off a single anchor — a heads-up seven days before Close and a final one the business day before is two tasks, one anchor, no conflict.

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

> If your deadlines are contractual, count them in business days and load your closed days into Pipeline once

> a year — business-day rules step right over them, so nothing lands on Thanksgiving. See Business Holidays.

5. Decide Who Each Deadline Belongs To

A deadline everybody can see is a deadline nobody owns — and visibility does double duty here, because whoever can see a task is also whoever gets reminded about it. Set the compliance tasks to admins and your agents stop hearing about them; set the contingency dates so both the agent and the admin can see them and both get the nudge.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

> Mark the handful that are genuinely milestones as key dates, and they'll travel onto coversheets and calendars as well as the task list. See Key Dates.

6. Let the Template Apply Itself

A timeline you have to remember to add isn't a timeline. Set the template to apply itself when a transaction reaches the status the timeline belongs to, and every deal arms its own deadlines the moment it qualifies — including the ones your agents open on a Saturday.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

7. Let the Daily Reminder Do the Chasing

There's nothing further to switch on. Every task you just dated is now inside the reminder that goes out each morning, grouped into what's overdue, what's due today, and what's due tomorrow — which means the timeline you built stops being a page someone has to open and starts being an email that finds them.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See Daily Task Reminder Emails