Decide Whether Pipeline Should Expire Your Listings

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Automatic expiration keeps your active list honest, and it costs you the expiration date the moment a listing moves. Pick a side deliberately, then set the rest of your account up around the choice.

Introduction

Automatic listing expiration does one visible thing: a transaction sitting in a Listing status reaches its expiration date, and Pipeline files it under your expired status without anyone touching it. Nothing overstays on the active list, and nobody has to run a Monday sweep. It's on by default and for most offices it's the right default.

What it also does is less obvious and is the reason people end up here. The same setting decides how the**Expiration Date field** behaves for the whole life of a transaction. With it on, the field only works while the deal is in a Listing status. Move to Pending and the date greys out and comes off. So the date is gone by the time you go looking for it: you can't search on it afterward, it can't carry over to a New Offer, and you can't record one on a Withdrawn file.

Turning it off reverses all of that. The expiration date becomes an ordinary date field that stays put at every status, stays searchable, and carries forward — and in exchange, nothing expires on its own again. Neither setting is the wrong answer. The question is whether your office needs the housekeeping or the history.

When to Use This

- You tried to pull a list of the listings that expired last year and the search came back empty.
- A listing's expiration date greyed out and disappeared when someone moved it to Pending.
- Transactions have expired on their own and nobody expected them to.
- A New Offer came through without the original's expiration date on it.
- You need to keep an expiration date on a transaction that isn't sitting in a Listing status.

1. Understand What the Setting Does to the Date

Before choosing, get the mechanic straight, because almost every surprise in this area traces back to it: the status change is what strips the date, not the passage of time. A listing that goes Pending in week one loses its expiration date in week one. And because a New Offer is spun from a transaction that has already left Listing status, there's nothing left on the original to copy across.

Let Pipeline retire a listing on its expiration date, so nothing lingers on your active list past the day the agreement ended.

See Automatic Listing Expiration

2. Choose Based on Whether You Need the Date Afterward

Put plainly, the trade is *automatic housekeeping* against *a durable date*, and you can have either but not both.

Keep it on when the job is keeping the active list clean and nobody asks about expirations after the fact. Listings retire themselves on the day, your Transactions page stays truthful, and the only thing you give up is a field you were finished with anyway.

Turn it off when the expiration date is a record rather than a trigger — when you report on expired listings, chase renewals months later, track lease ends, or need the date to survive onto a New Offer. Then expiration behaves like every other date field: visible at any status, editable, searchable, permanent. The price is that a listing which reaches its end date just sits there until a person moves it.

> Offices that track leases or long-dated agreements almost always end up in the off column, because the expiration matters long after the transaction has moved on from Listing.

3. If You Turn It Off, Build the Morning Sweep

Manual mode is only a burden if you're hunting. Run the search once — listing statuses, expiring today or this week — and save it, and the job becomes a single click from your left menu each morning: open the list, move what's on it, done. That's the whole cost of turning the setting off, and it takes about a minute a day.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

4. If You Keep It On, Search the Status Instead of the Date

With automatic expiration on, asking "which listings expired in the last quarter" by expiration date will always come back empty — the dates were cleared as each one went. The answer is to search the *status* and the day it changed: your expired status, with a Status Changed On range. That's the surviving record of when each listing actually expired, and it's as close to an expired-listings report as the account has.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

5. Keep the Field on the Statuses That Still Need It

There's a middle path worth knowing about. The Expiration Date field exists wherever the transaction sits inside the **Listing** status category — so a status like *Contingent* or *Under Contract* filed under Listing rather than Pending keeps its expiration date visible and editable while the deal is still technically a live listing agreement. Offices that need the date through contingency, but still want automatic expiration everywhere else, usually solve it here rather than by turning the setting off.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

> Filing a status under Listing puts those transactions back inside automatic expiration's reach. Check what

you'd want to happen to a contingent deal that hits its listing expiration date before you move a status into that category.

6. Warn Someone Either Way

Neither setting tells anybody anything. Automatic expiration changes a status silently, and manual mode waits for a human — so whichever you pick, the warning is a separate decision. Pipeline's own reminder is one account-wide switch, it goes to the agents on the transaction, and it fires five days out.

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

Five days isn't enough runway for a renewal conversation. For a warning on your own schedule, and pointed at your listing manager rather than the agent, build it as a checklist task instead — see Get a 30-Day Warning Before a Listing Expires.