

Trigger Dates FAQ

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Anchors are the transaction dates that due date rules and message schedules count from. Answers to the common questions about which dates qualify, adding your own, and why a calculated date sometimes comes up empty.

Which dates can I use as an anchor?

Six built-in dates, plus any optional or custom date field you've turned on. The built-in six are Acceptance Date, Close Date, Listing Date, Expiration Date, Transaction Creation, and Checklist Addition.

Can I add an anchor of my own?

Yes — build a custom date field and mark it as a trigger date. Once it's on your transactions, it shows up in the date-rule dropdowns alongside the built-in dates.

Can I rename or edit the built-in anchors?

No. The built-in date fields and Pipeline's prebuilt optional dates carry fixed names. If you need a different label, create a custom date field, name it whatever your office calls it, and mark it as a trigger date.

Do anchors work for scheduled messages too, or only tasks?

Both. The same anchor can drive a checklist task's due date and the schedule on a message template — for example, a message queued a set number of days before the Close Date.

Why is my task's due date blank?

The anchor it counts from hasn't been entered on the transaction yet. Add that date and the due dates fill in on their own.

Can a task be due a few days after another task is completed?

No — tasks can't anchor other tasks. The usual workaround is to give the milestone its own custom date field marked as a trigger date, then fill that date in when the milestone happens; every task counting from it moves together.

If I change an anchor date on a transaction, do the dates already calculated move?

Yes. Anything counting from that anchor recalculates from the new date, which is the whole reason to use a rule instead of typing dates in.

Does turning on a date field send anyone an email?

No. Enabling a date field only puts the field on your transactions and makes it available as an anchor. Reminders only happen once you build a task with a due date rule or schedule a message.

How many custom date fields can I have?

Up to 20 custom fields in total. That ceiling covers every custom field type together — dates, lists, and text — not 20 of each.

Learn More

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](#)

Still Have Questions?

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