Trigger Dates

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

Introduction

The acceptance date moves by two days and nothing on the file is right any more. Inspection, appraisal, the loan contingency, the walk-through: every one of them counted from that date, and every one now has to be worked out again and retyped.

Trigger dates are how you stop doing that arithmetic. Instead of typing a fixed date onto a task, you write down the rule you were working out in your head, three days after acceptance, five business days before closing, and Pipeline fills in the real date on each transaction from the dates already on that file. Move the date it counts from and everything hanging off it moves too. The same dates drive the timing behind your automatic messages, so a checklist and a schedule can count from the same place.

That afternoon of rebuilding a timeline is gone, and it stays gone the next time a deal shifts. A trigger date is where the counting starts from, though, not an alarm. It makes deadlines calculable. It doesn't send anything on its own.

How It Works

An anchor is a date on the transaction, and other dates count from it.

Which Dates Can I Count From?

Six come with every account: **Acceptance Date**, **Close Date**, **Listing Date**, **Expiration Date**, **Transaction Creation** and **Checklist Addition**. The last two are the ones nobody has to type, so a brand-new file can carry a deadline before a single contract date exists. Company settings call them Checklist Trigger Dates and the rule dropdowns say trigger dates — same thing. The six are fixed, but every date field you put on your transactions joins them, which is how a milestone Pipeline doesn't ship gets a date to count from.

Turn on prebuilt fields like inspection dates and earnest money to track the details your team cares about.

See Optional Fields

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

See Custom Fields

What Does an Anchor Drive?

Task due dates and scheduled messages, drawn from the same set — a task due five business days before Close Date, a message template queued thirty days after it. The anchor decides *what* you count from; the rule decides *how* Pipeline counts the days, in business days, calendar days, or calendar days that bump to the next business day. Turning an anchor on only makes the date available, so nothing reaches a person until a rule uses it.

Tell Pipeline which days your office is closed, and business-day due dates step right over them.

See Business Holidays

What Happens When the Anchor Moves?

Everything hanging off it moves too. Pipeline points at an anchor rather than copying it, so editing one recalculates every task due date and scheduled message counting from it, which turns a pushed closing into a single field edit. Until you fill the anchor in, anything counting from it shows no date, and those dates land the moment you enter it.

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

Trigger Dates FAQ

Anchors are the dates on a transaction that task due dates and scheduled messages count from, and you can add to the built-in set but not edit it. Answers to the common questions about which dates qualify, adding your own, and why a due date sometimes shows up blank. See Trigger Dates FAQ.