Get a 30-Day Warning Before a Listing Expires

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Pipeline's built-in reminder gives your agents five days' notice. Any lead time longer than that, you build yourself — out of a single checklist task.

Introduction

Five days is enough to notice a listing is expiring. It isn't enough to reach the seller, talk through a renewal, and get a signature back. That gap is why offices keep going looking for a setting that says thirty.

There isn't one. But there's something better, and you already own it. Put the warning on a checklist task and let the task's due date count backward from the listing's expiration date. Thirty days out, ninety days out, or twice if the conversation takes two passes. The rule is yours to write, and Pipeline does the arithmetic on every listing it touches.

An admin builds this once, on the checklist template your listings already use. From then on every listing carries its own warning, dated to its own expiration, with nobody typing a date.

When to Use This

- Your listings expire and nobody notices until the seller calls to ask what happened.
- Five days isn't enough runway — you want the renewal conversation started a month out, not a week out.
- The warning needs to reach your listing manager or your TC, and the built-in reminder only goes to the agent on the file.
- You track leases or buyer agreements in Pipeline and want a heads-up before the term runs out.
- You typed the expiration date onto the transaction and assumed something would tell you when it got close.

Why This Beats the Built-In Reminder

The instinct is to go hunting for the number that controls it. Pipeline does send an expiring-and-closing reminder — a master admin switches on **Email agents expiring and closing transaction reminders**, and from then on agents get an email five days before each of their transactions is set to close or expire. Five days, every time. It's a checkbox, not a dial, so the offices that want a month's notice go looking for a field to change and come back empty-handed. Its audience is fixed too: it reaches the agents on the transaction, and there's no way to add anyone else to it.

The second instinct is to type the date on the transaction and wait. That won't do it either — Pipeline doesn't watch transaction date fields and doesn't notify on them. What Pipeline watches is *tasks*. So the warning has to *be* a task, and the moment it is, all the machinery you already have picks it up and carries it: the Tasks page, the daily reminder email, your synced calendar. At whatever lead time you set, to whoever you point it at.

1. Add the Warning as a Task on Your Listing Checklist

Open the checklist template your listings already use and add a task named for the thing you'll need to do — *Listing*

Expires in 30 Days, *Call Seller About Renewal*, *Confirm Extension or Withdraw*. Write it as the action, not as the date; this is the line someone reads on a busy morning and has to act on without opening anything.

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See Document Names or Tasks to Track

2. Count the Due Date Back From the Expiration Date

This is the step that does the work. Don't type a date — set a *relative* due date on the template and build the rule off the listing's own **Expiration** date: 30 days, before, Expiration. Pipeline resolves that rule into a real date the moment the checklist lands on a listing, and re-resolves it if the expiration date ever moves, so a listing that gets extended re-arms its own warning without anyone touching 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

> If your account expires listings automatically, the Expiration Date field only applies while the transaction sits in a Listing status — move it to Pending and the field greys out. Your rule has nothing to count back from when that happens, so the task's due date will read blank. See Transaction Statuses.

3. Get the Checklist Onto Every Listing

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

4. Point the Warning at the Person Who'll Act on It

Here's where you beat the built-in reminder outright. A task lands on the list of everyone who can see it, which in a busy office means the warning arrives everywhere and belongs to no one. @mention the person who actually makes the renewal call — the listing agent, your listing manager, the TC — on the template task, and it shows up as theirs.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

5. Let the Daily Reminder Deliver It

Nothing else to switch on: the task is dated, so the daily reminder email will carry it. The email covers what's overdue, due today, and due tomorrow — which means your thirty-day warning arrives, unprompted, in the inbox of the person you pointed it at, on the morning the listing hits thirty days out. That's the whole point of putting the date on a task instead of in a field.

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

> Want the warning on your calendar rather than in your inbox? Flag the task as a key date as well, then sync a milestones-only feed to Google, Apple, or Outlook and let your calendar do the nudging. See Use Tasks to Track Key Dates on a Transaction.