

Key Dates FAQ

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

Key dates are tasks with timeline powers, their deadlines can calculate themselves, and they surface on coversheets, calendars, and emails. Answers to the common questions about business days, coversheets, and the autofill tag.

What's the difference between a key date and a regular task?

A key date is a task you've flagged for the timeline. Every key date is still an ordinary checklist task — marking it as a key date just adds the extras: it can show on coversheets, sync to calendars, and autofill into emails. A regular task tracks quietly without those.

Where do key dates show up?

On coversheets, in synced calendars, and in the `{{key dates}}` email tag. Turn on the coversheet option to print a *Transaction Key Dates and Milestones* timeline, sync key dates to your calendar app, and drop them into any email with the autofill tag.

What's the difference between business days and calendar days?

Business days skip weekends and your holidays; calendar days count everything. When you set a relative due date, **Business Days** leaves out Saturdays, Sundays, and your company's business holidays; **Calendar Days** counts every day; and **Calendar Days (Due Business Days)** counts every day but moves a due date off a weekend or holiday to the next business day.

Do I have to add weekends as holidays?

No. Saturdays and Sundays are automatically excluded from business days. You only need to enter your company's own business holidays for the math to be accurate.

How do I add a transaction's key dates to an email?

Use the `{{key dates}}` autofill tag. Drop it into an email or message template and Pipeline replaces it with the transaction's key dates — both complete and incomplete.

Can I sync only key dates to my calendar?

Yes. On the Tasks page, filter by *Key Date*, then choose the link for your calendar app. Only your key-date tasks come across, keeping your calendar focused on the milestones.

Learn More

See [Key Dates](#), or walk through it end to end in [Use Tasks to Track Key Dates on a Transaction](#).

Still Have Questions?

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