Key Dates

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

Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.

Introduction

Most tasks on a checklist are work. A few are dates the whole deal turns on: acceptance, the inspection deadline, the day it closes. Flagging one of those tasks as a key date tells Pipeline this line is a milestone rather than another item to tick.

Once a task carries the flag, its date stops living only on the checklist. It becomes something the rest of Pipeline can reach for, so it shows up where deadlines are actually read instead of where they were entered. An admin sets the flag on the checklist template, which means every transaction that picks up that checklist carries the same milestones in the same order: the earnest money window, the inspection period, the dates your office measures every deal against.

Because a key date's deadline can be worked out from something already on the transaction rather than typed in by hand, moving a closing date moves what depends on it. When a deal shifts, the checklist shifts with it instead of leaving you to re-date the file, and the timeline you set up once still reads right everywhere it's shown.

How It Works

Key dates ride on ordinary checklist tasks, get their deadlines from due-date rules, and then surface everywhere your team already looks.

What Makes a Key Date Special

A task marked as a key date can appear in a *Transaction Key Dates and Milestones* section on coversheets, sync selectively to your calendar app so only the milestones come across, and drop into emails through the `{{key dates}}` autofill tag. Both complete and incomplete key dates come along.

Due Dates Do the Math

Most key dates get their deadline from a relative due date — a rule like "5 business days before the Close Date." When the checklist lands on a transaction, or when the trigger date changes, Pipeline resolves the rule into a real date for you. You can build rules off transaction dates like Acceptance, Close, Listing, and Expiration, plus optional date fields like Inspection or Earnest Money once an admin turns them on.

Choose How Pipeline Counts the Days

When you set a relative due date, you choose how Pipeline counts the days: **Business Days** skip weekends and your company's business holidays; **Calendar Days** count every day; and **Calendar Days (Due Business Days)** count every day but bump a due date off a weekend or holiday to the next business day. Pipeline never counts Saturdays and Sundays as business days, so all you tell it is your holidays.

Designate a Task as a Key Date

Flag a task on a checklist template as a key date.

Who Can Do This: Admins with the *Fully manage checklists and templates* permission.

To designate a task as a key date:

1. Add a new checklist template, or open an existing one for editing.
2. Click [the key icon] next to the task you want to mark. Once the key date is on, the key turns blue.
3. Click [Save Template].

The task is now a key date on every transaction the checklist reaches, and it shows on coversheets, calendars, and emails.

Set a Relative Due Date for a Key Date

Give a task a deadline that calculates itself from another transaction date.

Who Can Do This: Admins with the *Fully manage checklists and templates* permission.

To set a relative due date for a key date:

1. Open the checklist template for editing.
2. Next to the task, click [the calendar icon].
3. Enter the number of days for the rule, then choose how Pipeline counts them — Business Days, Calendar Days, or Calendar Days (Due Business Days).
4. Choose [Before], [After], or [On], then pick the transaction date the rule counts from.
5. Click [Set Date Rule], then [Save Template].

Pipeline now fills in the due date automatically whenever the checklist lands on a transaction or the trigger date changes.

Show Key Dates on Your Coversheet

Turn on a timeline of key dates that prints on transaction coversheets.

Who Can Do This: The master admin.

To show key dates on your coversheet:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Check the box next to [Include key dates on coversheet].
3. Click [Save Settings].

Coversheets now carry a *Transaction Key Dates and Milestones* section, listing both incomplete and completed key dates.

Set Business Holidays for Due-Date Math

Tell Pipeline your company holidays so business-day due dates land correctly.

Who Can Do This: The master admin.

To set business holidays for due-date math:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Business Holidays] from the Templates section of the left menu.
3. Enter the holiday name and date in the fields provided.
4. Click [Update Business Holidays].

Business-day due dates now skip your holidays as well as weekends — keeping you in step with internal and state deadline rules.

Get the Milestones Onto Your Own Calendar

Flagging a task as a key date puts the milestone on the transaction. Getting it in front of you on a Tuesday morning is a second step, and it runs off the Tasks page, so a key date needs a due date on it before it makes the trip.

See your Pipeline task due dates right inside the calendar you already live in — Google, Apple, Outlook, or any app that takes a subscription link.

See Calendar Syncing

Key Dates FAQ

Key dates ride on checklist tasks, get their deadlines from due-date rules, and show up on coversheets, calendars, and emails. Answers to the common questions about business days, coversheets, and the autofill tag. See Key Dates FAQ. New to tracking dates this way? Walk through it end to end in Use Tasks to Track Key Dates on a Transaction.

Ways to Use Key Dates

See Key Dates at work inside a bigger job:

- Use Tasks to Track Key Dates on a Transaction