Task Due Dates

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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.

Introduction

A task with no due date sits on its checklist and waits for someone to open the transaction. Put a date on it and it joins the rest of your work: it appears on the Tasks page, it turns up in reminder emails, and you can search and sort it alongside everything else that's due.

You can type a calendar date, or write the date as a rule against something already on the transaction, like five business days before the close date. The rule version is what makes a checklist template worth building: the deadline works itself out on every deal without anyone doing the arithmetic. It also means the dates move when the deal does: change the close date and the tasks hanging off it follow.

Once the dates are on, the checklist tells your team when and not only what. Two things save time later. A task showing no date usually means nobody has filled in the date it depends on yet, rather than anything being broken. And taking a date back off is how you quiet a task you no longer need without deleting it, which matters when a deal falls through and the file still has to keep its record.

How It Works

Type a due date in or let Pipeline work it out — either way, it decides where a task shows up.

What a Due Date Does for a Task

It puts the task in front of people. The Tasks page works like a calendar, so it lists only tasks that carry dates — and so do the daily reminder emails and any calendar you've synced. A task with no date still sits on its checklist, still incomplete; you just have to open the transaction to see it.

Type a Date or Write a Rule

Either works. An **absolute date** is a fixed calendar date you pick yourself. A **relative due date** is a rule counted from a date already on the transaction — Acceptance, Close, Listing, Expiration, or a custom date field an admin has marked as a trigger date. The rule is what makes a checklist template worth building, and you choose how the days count.

Counting	What it does
Business Days	Skips Saturdays and Sundays, plus any day a master admin has saved as a business holiday. Pipeline doesn't observe federal holidays on its own.
Calendar Days	Counts every day, weekends and business holidays included.
Calendar Days (due Business Day)	Counts every day, then moves the result forward when it lands on a weekend or a business holiday.

What Happens When a Date Moves or Comes Off

The tasks follow. Change a trigger date and every task built off it moves with it, so a rescheduled closing is a one-field fix. Take a date off and the task stays on its checklist, incomplete and with its history — it leaves the Tasks page and stops sending reminders. That's the move when a deal falls through, since moving a transaction to Closed, Fell Through, or Auto Expiry leaves its checklists alone.

Set a Task's Due Date

Put a deadline on a task directly from the transaction, either as a fixed date or as a rule.

Who Can Do This: Admins with the *Fully manage checklists and templates* permission. Agents can set or change a due date only when an admin has allowed it for that task. See Agent-Editable Due Dates.

To set a task's due date:

1. Open the transaction and find the task on its checklist.
2. Hover over the task and click the calendar icon.
3. Choose an absolute date to set a fixed deadline, or build a relative due date rule off one of the transaction's dates.
4. Save your change.

The task now carries the due date and appears on the Tasks pages of everyone who can see it, in their daily reminders, and on any calendar they've synced.

Set a Relative Due Date on a Checklist Template

Write the due date rule once on the template so every transaction that gets the checklist arrives with its dates already worked out.

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

To set a relative due date on a checklist template:

1. Click [Gear] in the upper-right corner, then [Admin / Settings].
2. Open [Checklists] and click the template you want to edit.
3. Click the calendar icon next to the task you're scheduling.
4. Set the rule: the number of days, whether they're counted before or after, the trigger date to count from, and whether to count Business Days, Calendar Days, or Calendar Days (due Business Day).
5. Save the template.

From now on, every transaction that receives this checklist gets the task with its due date already calculated. Tasks that were already on transactions keep the dates they were given — the new rule applies going forward, not backward.

Remove a Task's Due Date

Stop the reminders on a task you no longer need without losing the task or its history.

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

To remove a task's due date:

1. Open the transaction and find the task on its checklist.
2. Click the task's due date.
3. Choose [Remove due date].

The task stays on the checklist as incomplete and the record of its original due date stays with the transaction, but it disappears from the Tasks page and stops appearing in reminder emails. Repeat for each task you want to quiet — once no unneeded task on the transaction has a due date, the reminders stop.

Add Your Business Holidays

Tell Pipeline which days your company is closed so business-day due dates skip over them.

Who Can Do This: The master admin.

To add your business holidays:

1. Click [Gear] in the upper-right corner, then [Admin / Settings].
2. Open [Business Holidays].
3. Use the year dropdown to choose the year you're setting up. You can fill in next year at any time — you don't have to wait for this year's holidays to pass.
4. Add each day your office is closed, then save.

Due date rules set to Business Days or Calendar Days (due Business Day) now step over those days. Tasks whose due dates were already calculated keep the dates they have — the holidays apply to calculations made from here on.

Who Gets Nudged About a Dated Task

A date on a task is only half of what decides whether anyone hears about it. The daily email is a per-person setting, and agents can't switch their own on or off, so an admin is the one who decides who wakes up to the list.

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

Frequently Asked Questions

Why don't my tasks show up on the Tasks page?

They don't have due dates. The Tasks page works like a calendar, so it only lists tasks with a due date on them — that's true even for tasks you've been @mentioned on. Add a due date to the task, or set a relative due date on the checklist template so future transactions fill it in automatically.

How do I stop reminder emails for a transaction that fell through?

Remove the due dates from the tasks — don't delete them. Moving a transaction to Closed, Fell Through, or Auto Expiry doesn't touch its checklists, because compliance tasks often still need finishing. Removing a due date keeps the task and its history on the transaction while dropping it off the Tasks page and stopping the reminders. You can also mark the task complete or delete it outright, but removing the due date is the option that costs you nothing.

What's the difference between an absolute date and a relative due date?

One is a fixed date you type in; the other is a rule that works the date out for you. An absolute date is a specific day on the calendar, like 11/21/2026 — good for deadlines that aren't tied to the deal's timeline. A relative due date is a rule like "5 days before Close Date," and it fills itself in on every transaction, then moves whenever the trigger date moves. Relative due dates are the better fit for most checklist work.

Does Pipeline skip federal holidays when it calculates due dates?

Not on its own — you tell Pipeline which days to skip. Offices don't observe the same holidays, so rather than assume, Pipeline lets a master admin add your company's business holidays. Once they're saved, any rule set to Business Days or Calendar Days (due Business Day) steps over them. Plain Calendar Days rules count every day regardless. Weekends are always excluded from business-day counting without any setup.

Why does a task's due date show as blank?

The rule is waiting on a date that isn't on the transaction yet. A gray `- / -` means the task has a relative due date, but the transaction date it counts from — an Acceptance Date or Close Date, say — hasn't been entered. Hover over the placeholder to see which date it's waiting on, then add that date to the transaction and the due dates fill in on their own.

Why is a task showing overdue when it shouldn't be?

Check the trigger date on the transaction — most often it's a mistyped year. A relative due date is only as right as the date it counts from, so a Close Date entered with last year's year makes every task built off it look overdue. Correct the transaction date and all the tasks built off it fix themselves at once.