Use Tasks to Track Key Dates on a Transaction

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One flag turns a checklist task into a milestone — and milestones show up on your coversheets, in your calendar, and inside your client emails.

Introduction

A key date is a checklist task you've flagged with the key icon. That's the whole definition: it's an ordinary task with one flag on it. What the flag buys you is reach. A flagged date can print on transaction coversheets, come across to your calendar on a feed of nothing but milestones, and drop into client emails through an autofill tag.

That reach is the entire reason to bother. A date typed into the Edit Transaction screen stays on the Edit Transaction screen. A date carried by a flagged task travels to the three places your team and your clients actually look.

An admin sets this up once, on a checklist template. From there every transaction that gets the checklist carries the same milestone, and the surfaces below are open to it.

When to Use This

- You want your close date or inspection deadline on your phone's calendar, and typing it into the transaction didn't put it there.
- You're emailing clients a status update and retyping the same four deadlines every single time.
- Your agents keep asking you for dates your coversheet doesn't show.
- You need to track a date Pipeline has no field for — a termite letter, an option period end, a time of reference.
- You've noticed a key icon sitting next to your checklist tasks and you're not sure what it turns on.

Why This Beats a Date on the Transaction

The instinct is to type the date where the date obviously goes — the Close Date field, the Earnest Money Due Date field, over on the Edit Transaction screen — and then wait for it to appear on your calendar. It won't. Pipeline syncs tasks, not date fields, and a date field has no route to a coversheet timeline or an email tag either. Those fields describe the transaction. They don't travel.

The second instinct gets closer and still falls short: give a task a due date and call it done. A due date does real work — it puts the task on your Tasks page, into the daily reminder emails, and onto your calendar feed. But it doesn't make the date a *milestone*. The key flag is what does that, and it's what earns the date a line on the coversheet, a lane of its own when you filter your calendar sync, and a place in the `{{key dates}}` tag. A task with a due date is tracked. A key date is published.

1. Add the Date as a Task

Start on the checklist template these transactions already use, and add a task named for the date itself — *Staging*

Date, *Option Period Ends*, *Termite Letter Due*. The tasks on a checklist are the documents to collect and the steps to finish on a transaction, and a date you care about is one more of them.

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See Document Names or Tasks to Track

2. Give the Task a Due Date

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

3. Flag the Task as a Key Date

On the template that's the key icon beside the task — blue means on.

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

See Key Dates

4. Apply the Checklist to Your Transactions

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

See Applying a Checklist

5. Show the Key Dates on Your Coversheet

Coversheets don't show checklists and they don't show tasks. What they can show is a*Transaction Key Dates and Milestones* section — a timeline built only from the tasks you flagged, listing the ones still open alongside the ones already done. It stays off until a master admin turns it on once for the whole account, and then every coversheet carries it.

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See Key Dates

6. Sync the Key Dates to Your Calendar

This is where the flag earns its keep: filter your Tasks page down to Key Dates before you copy the sync link, and your calendar fills with milestones instead of every task you own. Each person sets up their own sync, and the feed keeps itself current as dates move, tasks get checked off, and new transactions come in.

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

> A key date reaches whoever's task list it lands on. When a milestone belongs to one particular person — or to two — @mention them on the template task, and it turns up in each of their own @ Tasks lists and in each of their calendar feeds. See Task @Mentions.

7. Autofill the Key Dates Into Your Emails

The third surface is the one client updates get built on. Drop `{{key dates}}` into a message or email template, and Pipeline swaps in that transaction's key dates and their due dates as the message goes out — nothing retyped, and no chance of sending a deadline you moved last week. Completed key dates come along too, crossed out, so one email shows a client what's finished and what's still ahead.

When you want a single date rather than the whole list, advanced checklist autofill tags can target one task by name. Keep those task names plain: autofill tags accept only underscores, hyphens, and spaces as special characters, so a comma sitting in a task name will break the tag that points at it.

> The `{{key dates}}` tag sorts what it pulls — chronologically first, then alphabetically for dates landing on the same day. Key dates that don't have a due date yet sort to the *top* of the list rather than the bottom. If you need a different order, drag the tasks into the message body yourself instead of using the tag.