Clear the Decks When a Deal Falls Through

Last Modified on 09/04/2026 11:06 am EDT

A dead deal shouldn't keep sending reminders. Clear its checklist without throwing away the record you may still need.

Introduction

The offer collapses. You move the transaction to *Fell Through* and get on with your day — and the next morning the reminder emails arrive anyway. Tasks that will never be done sit on your *Tasks* page in red, and everyone on the deal keeps hearing about paperwork for a sale that no longer exists.

Here's why: changing a transaction's status doesn't touch its checklists. The status says where the deal stands; the tasks are separate, and they keep running until someone clears them. That's the whole problem, and it takes about a minute to fix.

The instinct is to delete: the tasks, the checklist, sometimes the transaction itself. Don't start there. A fell-through deal is still a record you may need for an audit, a commission question, or a client who comes back next spring. Removing the due date does everything you actually want: the reminders stop, the task leaves your list, and the history stays.

When to Use This

- An offer fell through and you're still getting task reminders for it.
- A listing expired or was withdrawn with tasks still open.
- A transaction was terminated or canceled and its checklist still reads as incomplete.
- Your *Tasks* page is full of overdue work on deals that died months ago.

> Got a new offer coming in on the same listing? Clear the old deal here first, then copy the listing into a fresh transaction — see New Offers.

1. Move the Transaction to a Fell Through Status

Start by telling Pipeline the deal is over. A status in the Fell Through category takes the transaction off your default lists and keeps the whole file intact for later.

Don't delete the transaction. Deleting is for files created in error — not for deals that genuinely happened and then didn't close.

Expect the checklist to be exactly as you left it. The status change is a label on the deal, not an instruction to the tasks.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

2. Check Off the Work That Actually Got Done

Some of the checklist really was completed before things unravelled — the listing agreement was signed, the disclosures went out. Check those tasks off the normal way so the record shows the work that happened.

A completed task is one an admin has verified and checked off — and Pipeline can hide completed tasks so your checklists stay clean.

See [Completed Tasks]

3. Mark the Tasks That Never Applied

Other tasks were never going to happen on this deal. The financing steps on a sale that died at inspection, the closing items on a listing that never went under contract — those aren't done, and calling them done would be a lie your file has to live with.

Mark them Not Applicable instead. They're set aside without being counted as complete — though the mark alone doesn't clear them from the checklist's completion percentage. An admin still has to check them off or delete them for that.

Some tasks on a checklist just don't apply to a given deal — mark them Not Applicable to set them aside without pretending they're done.

See [Not Applicable Tasks]

4. Remove the Due Date From Everything Still Open

This is the step that stops the emails, and it's the one most people miss.

A task only reaches the *Tasks* page and the daily reminder emails because it has a due date. Take the date off and the task goes quiet: it stays on the transaction with its name intact and the record of the date it once had, but it stops appearing on anyone's list and stops sending reminders. Nothing is destroyed — it just stops asking.

Repeat for each task still carrying a date. When the last one is clear, the deal stops reminding anybody about anything.

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]

5. Delete a Task Only When You Don't Need Its Record

Deleting is the right call when a task shouldn't have been there at all — a checklist applied to the wrong deal, a step your office no longer runs. It's the wrong call when you might have to explain the file later, because the task and its history go with it.

To remove a single task, hover over it and click the **[X]**. To remove a whole checklist, hover over the checklist's title and click its **[X]**.

If you want the record but not the clutter, drag the checklist into a note on the transaction before you remove it. The note keeps the checklist exactly as it stood, due dates and all.

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See Checklists Panel

6. Ask About a Bulk Cleanup for a Backlog

If you're staring down years of overdue tasks across hundreds of dead transactions, don't work through them by hand. Our tech team can clear due dates in bulk against a rule you set — something like *remove due dates for all tasks due before this date.* The tasks stay on their checklists as incomplete; only the dates come off, so the reminders stop.

It's hands-on work and it carries a fee, and your master admin has to make the request and approve the charge. Email help@paperlesspipeline.com and tell us the rule you want applied.