

Contingency Dates

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Put your contract's deadlines on the deal itself. The Contingency Dates section holds the earnest money, inspection, loan approval, appraisal, and option period dates your file runs on.

Introduction

A contract arrives with five deadlines in it, and the transaction shows four date fields, none of them the ones you need.

Contingency Dates is the section that carries the rest. It sits on the transaction below the listing and closing dates, and it holds Paperless Pipeline's own contract-milestone fields. Which of them your account uses is a company-wide choice rather than a per-deal one, so a date means the same thing on every file in the account, and only the fields your office turned on appear.

Once a date is in one of these fields it behaves like the rest of the transaction: it prints on the coversheet, drops into messages as an autofill tag, comes down in the transaction spreadsheet, and can be the date a checklist task counts from. What it doesn't do is chase anybody, and that's worth knowing before you rely on it.

How It Works

Which Dates the Section Holds

Pipeline's contract milestones, most of them in pairs: the date something is due, and the date it happened. Your account shows the ones a master admin switched on.

Milestone	Due date	Date it happened
Earnest money	Money Due Date	Money Deposit Date
Inspection	Inspection Due Date	Inspection Date
Loan approval	Loan Approval Due Date	Loan Approval Date
Appraisal	Appraisal Due Date	Appraisal Date
Option period	Option Period End Date	None

Your Office Chooses Which Ones Appear

A master admin turns them on in company settings, and each one you turn on becomes a permanent field on every transaction. The set itself is fixed, and so are the names, so a deadline your contract calls something else — a feasibility date, a condition removal date, a buyer investigation period — lives as a custom date field under the

name you give it, in its own section on the transaction.

A Date Here Is a Record, Not a Reminder

Filling one in doesn't email anyone, and contingency dates don't reach the Tasks page or a synced calendar, because those are built from checklist tasks with due dates. An office that wants to be chased mirrors the deadline as a task and counts it off the same date, which puts it in the daily reminder email and on the calendar with everything else.

Enter a Contingency Date on a Transaction

Record a contract deadline on the deal so it shows on the transaction and on the coversheet.

Who Can Do This: Anyone who can edit the transaction.

To enter a contingency date on a transaction:

1. Open the transaction and click [Edit Transaction] in the left menu.
2. Scroll to the **Contingency Dates** section.
3. Enter each date in mm/dd/yy format, or pick it from the calendar.
4. Click [Save Transaction].

The dates you entered show in the Contingency Dates section of the transaction, and any task or scheduled message counting from one of them recalculates.

Turn On the Dates Your Contracts Use

Nothing appears in this section until somebody switches the fields on for the account, which is a master admin's job and takes a checkbox each.

Turn on prebuilt fields like inspection dates and earnest money to track the details your team cares about.

See [Optional Fields](#)

Track a Deadline Pipeline Doesn't Ship

A date your contract has and this section doesn't, or one your office calls by its own name, is a field you build yourself.

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See [Custom Fields](#)

Make a Deadline Do Something

The step that turns a recorded date into work somebody gets handed is counting a task off it, and any date field you've turned on can be the thing counted from.

Pick the date a deadline counts from, and Pipeline works the rest out on every transaction — for task due dates and scheduled messages alike.

See [Trigger Dates](#)

Contingency Dates FAQ

Answers to the common questions about renaming the built-in fields, adding your own, reminders, and where these dates turn up.

See [Contingency Dates FAQ](#).
