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	Earnest Money Due Date	Earnest 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 m/d/yyyy 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

Frequently Asked Questions

Can I rename the built-in contingency date fields to match what our contracts call them?

No. The built-in names are fixed. A custom date field is the way to get the wording you want: you name it yourself, it sits on every transaction, and it does the same work the built-in dates do. Offices that need Buyer Investigation rather than Inspection build it that way.

Our contract has deadlines your list doesn't. Can I add my own?

Yes, as custom date fields. A master admin creates each one from your admin settings and names it whatever your office says out loud. There's a cap per account, so check the built-in list first and spend the slots on what nobody prebuilt. See Custom Fields.

Does anyone get an email when a contingency date comes up?

No. A date sitting in a field doesn't notify anybody. Reminders come from checklist tasks. Mirror the deadline as a task and set it to come due off that date, and it lands in the daily task reminder email and on the Tasks page like the rest of the work.

Why don't contingency dates show on the Tasks page or sync to a calendar?

Because only tasks with due dates go there. Transaction dates are a record on the deal, not an item of work, so they stay on the transaction. The task you count off the date is the part that travels to your Tasks page and your calendar.

Who turns contingency date fields on?

A master admin, from your company settings. Each field is a checkbox, and switching one on adds it to every transaction in the account from that point. See Optional Fields.

Do contingency dates come down in the transaction spreadsheet?

Yes. Every date field you've turned on gets its own column in a downloaded Transaction Spreadsheet, alongside the rest of the transaction's details. They also print on coversheets and work as autofill tags in your documents and messages.