Track the Contract Dates Your Deals Run On

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Inspection, appraisal, loan approval, option period — the dates a contract actually runs on. Get them onto the transaction and every task and reminder can count from them.

Introduction

Most offices arrive at this wanting a custom field, and most of them don't need one. Pipeline ships a set of contract-milestone date fields that are switched off by default, and turning the right ones on covers the majority of what people come asking for.

What's left after that is what custom date fields are for: a feasibility deadline, a condition removal date, whatever your state or your contract calls it. Either way, the payoff is the same: once a date lives in a field, it prints on the coversheet, it can drive checklist tasks and scheduled messages, and you can search on it.

When to Use This

- Your contract has deadlines Pipeline isn't showing anywhere on the transaction.
- You need tasks to fire a set number of days before a contingency date.
- You want a list of every deal whose condition removal date falls this month.
- You turned on a date field and expected a reminder email that never came.
- Your coversheet is missing the dates escrow keeps asking about.

1. Turn On the Built-In Date Fields First

Start here, because it's free and it's usually enough. Pipeline already has the contract milestones built — inspection and inspection due, appraisal and appraisal due, loan approval and loan approval due, the earnest money dates, and the option period end. A master admin switches on the ones your office uses and they appear on every transaction from then on.

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

See Optional Fields

2. Add a Custom Date Field for Anything Else

When the deadline you need isn't on that list — a feasibility deadline, a condition removal date, a title commitment date — build it. A custom date field is added once by an admin and behaves like the built-in ones from that point on: on the transaction, on the coversheet, in your spreadsheet download.

Build your own transaction fields to capture the data Pipeline doesn't already track.

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

See Custom Fields

> Custom fields are capped per account, which is a good reason to check the built-in list properly before spending one. A date you'll only ever look at, never count from, may be fine as free text.

3. Make the Date Something Tasks Can Count From

This is the part worth the setup. Any date field you turn on — built-in or custom — can be enabled as a trigger date, which means a checklist task can be due *seven days before the appraisal deadline* rather than on a fixed calendar date. Pipeline works out the actual due date on every transaction.

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

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

See Key Dates

4. Use a Task When You Only Need a Reminder

Not every date needs to be stored. If what you actually want is to be nudged — call the lender ten days out, chase the survey before the option period ends — a task with a relative due date does that on its own, and you never have to build or maintain a field for it.

Worth being clear about the other half of this: turning on a date field does not produce a notification by itself. A date sitting in a field is a record, not an alarm. The task is what makes it chase you.

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. Put the Deadlines You Watch One Click Away

Once a date exists as a field, you can search on it — every transaction whose condition removal date lands this month, say. Save that search and it sits in your left menu, rebuilt for you every morning.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts