Transaction Dates

Last Modified on 11/10/2026 12:20 pm EST

Enter a deal's listing, expiration, acceptance and close dates, and Pipeline counts deadlines and builds reports from them.

Introduction

Every deal runs on four dates of its own: the day the listing was taken, the day the listing agreement ends, the day an offer was accepted, and the day it closes. Paperless Pipeline gives each one a field on the transaction, under *Transaction Information* when you add the deal.

Fill in what you know when you open the file and the rest as it happens. Pipeline reads these dates wherever it needs a day to count from or file by. A closing lands in the month its close date names. A task due three days after acceptance gets its date the moment the acceptance date goes in. And when a closing slides a week, you change one field and everything counting from it follows.

How It Works

Four fields on every transaction, each marking a different moment, and each read by a different part of Pipeline.

Four Dates, Four Moments

Date	What it marks	What reads it
Listing Date	The day the listing was taken	The Listing Inventory Report, which files listings by it. Search calls it Listed On.
Expiration Date	The day the listing agreement ends	Automatic listing expiration, and the five-day expiration reminder.
Acceptance Date	The day the offer was accepted	Search, where it's called Accepted On, and the Acceptance Date Range filter on the Pending Commissions report.
Close Date	The day the deal closes, or closed	Commission reports and the Pending Inventory Report, the Close Date column on your Transactions list, and the five-day closing reminder.

Deadlines Count From Them

All four are trigger dates. A checklist task can be due five business days before the Close Date, and a scheduled message can go out a set number of days after the Acceptance Date. Change the date and every due date and message counting from it recalculates. Until a date is filled in, anything counting from it waits without one.

The Close Date Decides the Period

Reports file each deal into a month and a year by its Close Date. A pending deal with no close date isn't counted anywhere, and a deal that closed in December but still carries a January date counts in January. Pipeline lets a transaction be marked Closed while its close date is still ahead, unless your office turns on the setting that prevents it.

The Expiration Date Follows a Company Setting

Automatic listing expiration is on unless your office turned it off. While it's on, the Expiration Date works only while the transaction is in a Listing status. Pipeline moves a listing still in that status to your Auto Expiry status on the date, and clears the date when the deal leaves Listing status. With the setting off, the Expiration Date is an ordinary date that stays put at every status, and nothing expires on its own.

What a Date Won't Do on Its Own

Typing a date doesn't email anyone or put anything on your calendar. Pipeline syncs tasks, not date fields, so a task counted from the date is what reaches your Tasks page and your calendar. The one built-in heads-up is a company setting that emails the agent five days before a Close Date or an Expiration Date.

Enter or Change a Transaction's Dates

Put the four dates on a deal, or move one when the deal moves.

Who Can Do This: Admins, and agents on the transaction who have the Change transaction status permission.

To enter or change a transaction's dates:

1. Open the transaction and click [Edit Transaction] in the left menu.
2. Select or enter the **Listing Date**, **Expiration Date**, **Acceptance Date** or **Close Date** in m/d/yyyy format.
3. Click [Save Transaction].

The dates show on the transaction, and every task due date and scheduled message counting from one of them recalculates.

> **Note:** The same four fields are on the Add Transaction form, so a deal can carry its dates from the day you open it.

Count a Date From Another Date

Let Pipeline work out a date a set number of days from another one, instead of counting on a calendar.

Who Can Do This: Anyone who can enter the date you're filling in.

To count a date from another date:

1. While adding or editing a transaction, click into the date field you want to fill.
2. Click [Count from a date].

3. Pick the date to count from, such as the Acceptance Date or the Listing Date.
4. Enter the number of days, and choose whether to count calendar days, business days, or calendar days falling on a business day.
5. Insert the result, then save the transaction.

Pipeline works out the date, skipping your company's business holidays when it counts business days, and drops it into the field.

Turn On the Contract Dates Pipeline Ships

A contract carries more deadlines than these four. Pipeline ships the common ones as fields a master admin switches on: inspection, appraisal, loan approval, earnest money and option period dates. Each one appears in the Contingency Dates section of every transaction, and each can drive task due dates and scheduled messages.

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

See Optional Fields

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.

See Contingency Dates

Build a Date Pipeline Doesn't Have

For a deadline Pipeline doesn't ship, or one your contract calls by another name, build a custom date field. Check [Add as Trigger Date] when you create it, and tasks and scheduled messages can count from it too.

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

See Custom Fields

Make a Date Drive the Deadlines

The four dates, and any optional or custom date you turn on as a trigger, are what checklist tasks and scheduled messages count 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

A key date is something else: a checklist task you flag, often due a set number of days from one of these four.

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

See Key Dates

Tie Statuses to the Dates

Two company settings connect a deal's status to its dates. One moves a listing to your Auto Expiry status on its Expiration Date. The other holds a deal back from Closed until its Close Date has arrived.

Let Pipeline retire a listing on its expiration date, so nothing lingers on your active list past the day the agreement ended.

See Automatic Listing Expiration

Stop a deal from being marked Closed while its close date is still ahead, so a closed transaction never carries a closing day that hasn't happened yet.

See Early Close Prevention

Find Deals by Their Dates

Each date is a search filter. Search Listed On for the listings you took, Accepted On for the deals that went under contract, and Close Date for closings. Listed On and Accepted On stay put when a status changes, so they still find a deal that has since moved on.

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

Frequently Asked Questions

Where do I enter the closing date?

In the Close Date field. Pipeline's Close Date is your closing date or close of escrow (COE): open the transaction, click [Edit Transaction], enter it and save.

Why can't I change a date on my transaction?

The dates open up with the Change transaction status permission. Ask an admin to make the change or to grant the permission. The agent who created a transaction can still change its Listing Date while it's in a Listing status. See Why Can't I Update a Transaction Field?

Where did the expiration date go?

Automatic listing expiration cleared it. With that company setting on, Pipeline removes the Expiration Date when a transaction leaves a Listing status or expires. See Why Did My Listing Expire or Its Expiration Date Disappear?

Why won't Pipeline let me mark the deal Closed?

Its Close Date is still in the future. Your office has Early Close Prevention on, so change the Close Date to the day the deal closed and set the status to Closed in the same edit. See Why Can't I Change This Transaction to Closed?

Does anyone get a reminder before a close date or an expiration date?

Yes, when your company turns it on. Pipeline emails the agent five days before the Close Date or the Expiration Date. For a different lead time, count a checklist task from the date. See Closing & Expiration Reminders

Will my close dates show up on my calendar?

Not on their own. Pipeline syncs tasks, not date fields, so a task with a due date counted from the Close Date is what reaches your calendar. See Get Your Pipeline Deadlines Onto Your Own Calendar