

# Managing Key Dates

## SUMMARY

Use checklist tasks to create reminders for key dates in a transaction, then use @mention to sync those dates to an external calendar.

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## Set Reminders for Key Dates

Use checklist tasks to create reminders for key dates in a transaction. Reminders can be set for transaction date fields, optional due date fields or even dates that don't have fields in Pipeline.

To set up task reminders for key dates:

- 1 **Add the key date task to a checklist template**(e.g. Inspection Due Date)
- 2 **Assign a relative due date to the task**(e.g. Due on Inspection Due Date)

When the checklist template is added to a transaction, users with visibility to that task will receive reminders for that key date.

[Learn more about Adding Relative Due Dates →](#)

## Set Key Dates to Sync to Agent Calendars

Use the @mention feature to sync specific key dates to an external calendar (e.g. iCal, Outlook or Gmail).

To set key dates to sync to an agent's calendar:

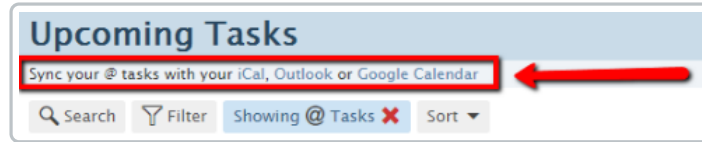
### First: Set Up @mentions

- 1 **Make sure all of your agents have the same role**(e.g. Agent)
- 2 **Add an @mention for the role you specified to each key date task you'd like to sync to the agent's calendar** (e.g. "Inspection Due Date @agent")

### Second: Sync Agent Calendars

Have each agent complete the following steps while logged into their Pipeline account:

- 1 From the Task page, click [Your @ Tasks] to display only their @mentioned tasks.
- 2 Select the desired calendar type to sync the tasks to that calendar.



- 3 Complete any steps/questions that follow.

Current and future tasks where the agent is @mentioned (including any key date tasks) will now automatically sync to the agent's calendar.

[Learn more about Syncing Tasks with Calendars →](#)

## Pipeline Pro Webinar Recording: Tracking Key Dates and Timelines in Pipeline

This week we'll dive into how to setup, sync, and share key dates and timelines in Pipeline.

🕒 9:48

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