Coversheet Layout FAQ

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Coversheets are auto-generated, lead with the layout you pick, and show only the fields you choose. Answers to the common questions about layout options, hiding fields, and when changes apply.

What layout options are available?

Info / Details, People / Contacts, and Dates / Milestones. Each leads the coversheet with a different slice of the transaction, so it opens with whatever your office cares about most.

Can I hide certain fields from the coversheet?

Yes. When you customize the layout, you check the fields you want shown and uncheck the ones you don't. Only the fields you leave checked appear on the coversheet.

Can I keep buyer or seller contact info off the coversheet?

Yes — uncheck those fields. Leave the contact details you want to share (like escrow, lender, or agent info) checked, and uncheck the buyer or seller contact fields you'd rather not include. Keep in mind the layout is company-wide, so it applies to every transaction's coversheet.

Do layout changes affect coversheets that already exist?

New coversheets reflect the update. After you save, coversheets pull your latest layout and field choices, so the current version of a transaction's coversheet shows your updated setup.

Who can change the coversheet layout?

The master admin. The coversheet layout is a company setting, so one consistent format applies across all of your transactions.

Learn More

Choose which details lead your company's coversheet and which fields appear on it at all.

See [Coversheet Layout]

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.