Coversheet Layout

Last Modified on 09/04/2026 11:15 am EDT

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

Introduction

Escrow wants the deal on one page. So does the agent on the other side, and so does the client who asks where things stand. Somebody in your office is answering that question over and over, usually by retyping the same handful of facts.

Every transaction already has a coversheet, generated for you and current as the deal changes, so there's a summary to save or send without anyone building one. The layout is where your office decides what that summary leads with and which fields it carries at all. It's a company-wide choice rather than a per-deal one, and that's what makes the coversheet worth sending: whoever receives it gets the same page in the same shape every time, and learns where to look.

So "can you send me the details" becomes one file instead of an email composed from scratch. Set the lead to match what your office gets asked for most, and leave off the fields you'd rather not put in front of someone outside the deal. What goes out is then a page you meant to send, rather than everything the transaction happens to hold.

How It Works

The coversheet is generated for you, its layout leads with the aspect you choose, and you decide which fields make the cut.

What a Coversheet Is

Pipeline automatically generates a coversheet for every transaction, giving agents and admins a savable, shareable summary of the most current key details to pass along to co-agents, clients, or others.

The Layout Options

You pick which aspect the coversheet highlights near the top: **Info / Details**, **People / Contacts**, or **Dates / Milestones**. Each option leads with a different slice of the transaction so the coversheet opens with what matters most to your office.

Choosing Which Fields Show

Beyond the lead layout, you check the fields you want on the coversheet and uncheck the ones you don't — so a coversheet shows exactly the information you intend to share.

When Changes Take Effect

After you save, new transaction coversheets reflect your updated layout and field choices.

Customize Your Coversheet Layout

Set the lead layout and choose which fields appear from your company settings.

Who Can Do This: The master admin.

To customize your coversheet layout:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to the section for Transaction Coversheet Layout.
3. Click the dropdown and select the layout that best fits your office — Info / Details, People / Contacts, or Dates / Milestones.
4. Check the boxes next to the fields you want included and uncheck the ones you want excluded.
5. Click [Save Settings].

From here on, new coversheets open with your chosen layout and show only the fields you selected.

Fill the People Half of the Page

Choose the People / Contacts layout and the coversheet leads with whoever is on the deal — which on a lot of transactions is a short list or an empty one. Those names don't come from this settings page; they're added deal by deal as escrow, the lender, and the other side turn up.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

Coversheet Layout FAQ

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. See Coversheet Layout FAQ.