Hand Escrow Everything They Need on One Page

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Escrow wants the deal on one page — the parties, the price, the dates, who to call. Pipeline builds that page for every transaction; the work is making sure it says what your partners need.

Introduction

Every transaction has a coversheet: a clean, formatted PDF summary that anyone can save or send. Offices use it as the handoff document to escrow and title, which raises the stakes on a field being blank. A coversheet arriving without the seller's address stops the handoff and generates a phone call.

Two settings shape what's on it, and a third habit keeps it filled in. Get those right and the same one-page handoff works for every deal without anyone assembling anything.

When to Use This

- Escrow or title is asking for a transaction summary and you're pasting one together by hand.
- A field escrow needs is missing from your coversheet and you can't find where to add it.
- Your coversheets are going out with blanks where the contract dates should be.
- Title wants a list of what's still outstanding on the file.
- You need to print a transaction — everything on it — for a closing or a compliance request.

1. Set the Layout Your Partners Read

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

See Coversheet Layout

2. Turn On the Fields Escrow Keeps Asking For

A field that isn't switched on for your account can't be on the coversheet. If escrow wants the earnest money amount, the inspection date, or the option period end and none of them are there, the fix is upstream: turn those optional fields on and they appear on the transaction and on the coversheet.

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

See Optional Fields

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

See Key Dates

3. Fill In the Contacts, Not Just the Transaction

This one causes real confusion. Some of what appears on the coversheet is drawn from the *contact records* on the transaction rather than from the transaction's own fields — the seller's address is the usual example. When it's blank on the coversheet, the place to fix it is the seller's contact, not the coversheet layout.

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]

4. Keep the Prompts Visible So Nothing Goes Blank

A coversheet is only as complete as the transaction behind it. Setting default values on More Info — a short list of the things your office always needs, typed as labels — puts a visible prompt on every new transaction, and prompts get filled in where empty boxes don't.

Pre-fill the More Info, Admin Info, and Commission Summary fields on every new transaction so nothing important gets forgotten.

See [Default Field Values]

5. Print the Transaction When the Coversheet Isn't Enough

Sometimes escrow wants more than a summary. The transaction page itself prints properly from your browser, and the first page alone carries the transaction information, the assigned agents, and every contact — which is often exactly the sheet someone was trying to build by hand. Print the whole thing and the notes and sent emails come out at the end.

Every note you add and every email you send from a transaction lands in one running log at the bottom of the page.

See [Notes & Sent Emails]

The checklist prints too, which is how offices give title a list of what's still outstanding alongside the deal's details.

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See [Checklists Panel]

> If what you want is to *send* the outstanding items rather than print them, Pipeline will put the checklist straight into an email. See [Send Outstanding Items to an Agent or a Client].