# **Transaction Coversheets**

Customize coversheets that let your agents and admins save and share key details about a transaction in a clean, formatted PDF.

#### Introduction

A coversheet is automatically generated for every transaction, providing an overview of the transaction in a savable and shareable format.

Agents and admins can view and email coversheets from transactions to easily share the most up to date key details with co-agents, clients, or others.

The coversheet can be customized to meet your office's specific needs, whether you want to summarize important information, highlight significant milestones, or showcase the individuals involved.

Master admins have complete control over how coversheets are presented from Company Settings .

#### Customize Your Company Coversheet Layout

**Customize your company coversheet layout** to meet your office's specific needs, whether you want to summarize important information, highlight significant milestones, or showcase the individuals involved.

Who Can Do This? Master admins can customize the coversheet layout.

To customize the coversheet layout:

2 Scroll down to the section for Transaction Coversheet Layout.

Search address, mls, agent, seller, buyer	Q Transactions Tasks Unassigned Unreviewed
Custom Fields	Email agents expiring and closing transaction reminders
– Templates	Email agents when admin comments on documents
Business Holidays	Use minimal formatting for messages sent from transactions. <u>See Examples →</u>
Checklists	
Break Apart Docs	Transaction Coversheet Layout
+ Backups	Select the layout that best meets your office's needs:
	Info / Details -
– Billing	Choose which fields should be included in the selected coversheet layout:
Upgrade / Downgrade	Commission Info Optional Fields
Update Credit Card Billing History	More Info
Shining motory	Key Dates Custom List Fields
+ Add-On Modules	
+ Integrations	Contacts List 🖌 Custom Text Fields
	Contingency Dates
Current Plan	Feature Settings
Transaction quota 10	Require two-factor authentication
Transactions created 1	Enable Reviewed Docs functionality
Transactions remaining 9	

3 Click the dropdown and select the layout that best meets your office's needs. Each layout option highlights a different aspect of the transaction and displays them near the top.

View a PDF example of each layout option:

- Info / Details  $\rightarrow @$
- People / Contacts  $\rightarrow @$
- Dates / Milestones → Ø

Transaction Coversheet Layout				
Select the layout that best r Info / Details Info / Details People / Contacts Dates / Milestones Classic	neets your office's needs:	For a "Minimal" coversheet, select your desired layout, then exclude as many fields as desired. <u>Click here to view coversheet options help</u> .		
Key Dates Contacts List Contingency Dates	Custom List Fields			

4 **Choose which fields should be displayed on the coversheet**by checking the boxes next to the fields that should be included and unchecking the boxes next to the fields that should be excluded.

Transaction Coversheet Lay	yout	
Select the layout that best n	neets your office's needs:	
Info / Details		•
Choose which fields should coversheet layout:	be included in the selected	
Commission Info	Optional Fields	<ul> <li>Total Commission</li> </ul>
More Info	Custom Date Fields	Commission Summary
Key Dates	Custom List Fields	
Contacts List	Custom Text Fields	
Contingency Dates		
Feature Settings		
Require two-factor auth	nentication	
Enable Reviewed Docs f	functionality	
Enable Entered Docs fee	ature	

Hover over an option to view which fields it contains (as shown above).

<sup>5</sup> Click [Save Settings]. After that, new transaction coversheets will reflect your updated settings.

## View A Coversheet

View a transaction coversheet PDF.

Who Can Do This? Agents and admins can view coversheets on transactions they have access to view.

To view a transaction coversheet:

**1** Go to a transaction.

**2** Click [coversheet]. The coversheet PDF will open in a new window where you can view it.



### **Email A Coversheet**

Email a coversheet to easily share the most up to date key details with co-agents, clients, or others.

Who Can Do This? Agents and admins can email coversheets from transactions they have access to view.

To email a transaction coversheet:



1 Go to a transaction.



2 Scroll down and click [Note / Email] just above the Documents area.

3 Check the box next to [Attach this transaction's coversheet].

	🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Refer	ence	+ Add Transaction ? Help 🔇	Rob
Commission Disbursement Authorization				
Cooperating broker's commission agreement	18 Park Street, Phoenix, AZ 85001 (	sample) Added on Nor Last updated	v 13, 2022 by Robert Zimmerman Oct 19, 2023 by Robert Zimmerman	
Buyer Preapproval				
<ul> <li>Lead Based Paint Disclosure signed by buyer &amp; seller (if applicable)</li> </ul>	🖂 Note / Email 🕺 Add Contact 💡 Merge ᠿ Upload Docs	6	Q Sec	arch [
Change status to pending in MLS (if 1/9 our listing)	Email this message to:			
✓ Show completed tasks →	Listing agents Staff (1)			
Add doc name or task	Jonathan Carey (sample user) Robert Zimmerman			
	Tammy Sheldon (sample user)			
<ul> <li>Sample listing checklist</li> </ul>	Send to an external email address ()			
Agency Disclosure	seller@paperlesspipeline.com Enter email addresses			+
MLS Data Sheet / Input Form	Subject ()	Add autofill tag -	Message Templates	
Seller's authorization to advertise	Great News!		Choose a saved message template	
property				
✓ Show completed tasks →	Message Audio Message		Add auto	ofill to
			Autofiii tag hejo Form	oatting
	Options			oatting
	Make this note private (in Notes & Sent Emails below)		te tasks to message	atting
				oatting
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	Make this note private (in Notes & Sent Emails below) Send me a BCC (blind copy) of the message Save this message as a reusable template	Append complete	te tasks to message d tasks to message asks to message	
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4 Optionally, include contacts by checking the box next to [Include contacts in this coversheet].

Message	Audio Message	Add autofill tag 🛩		
Type your r	message here			
		Autofill tag help Formatting tips		
Options				
Make t	his note private (in Notes & Sent Emails below)	Append incomplete tasks to message		
Send n	ne a BCC (blind copy) of the message	Append completed tasks to message		
Save th	nis message as a reusable template	Append overdue tasks to message		
Cancel		Preview Message Send Email 🗸		
Attached De	ocs			
Send de	ocs as zip file link			
🖌 Attach	this transaction's coversheet			
Include contacts in this coversheet				
Check the	yellow boxes of docs to attach below.			

5 Continue & complete your message, then send it.Learn more about Emailing Docs & Notes from Transactions →