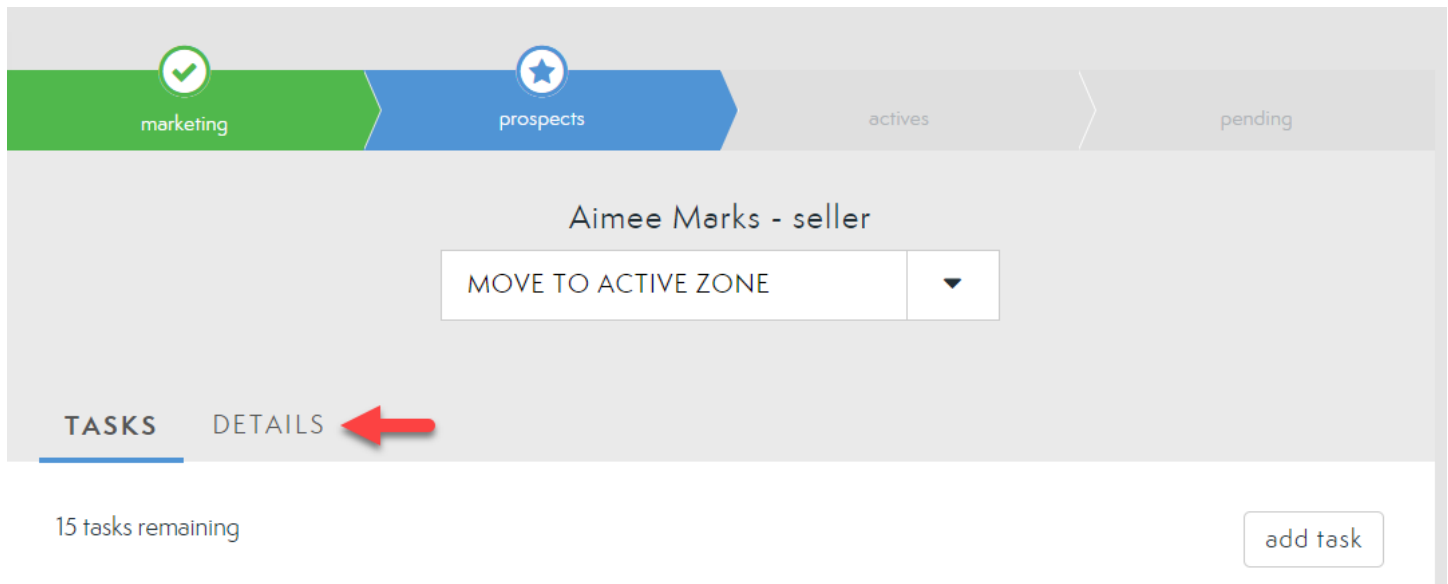


# Editing Transaction Details

Each Sales Flow zone is a milestone for an individual person's progress towards a successful transaction. You can edit details or add notes at any time for each part of your transaction.

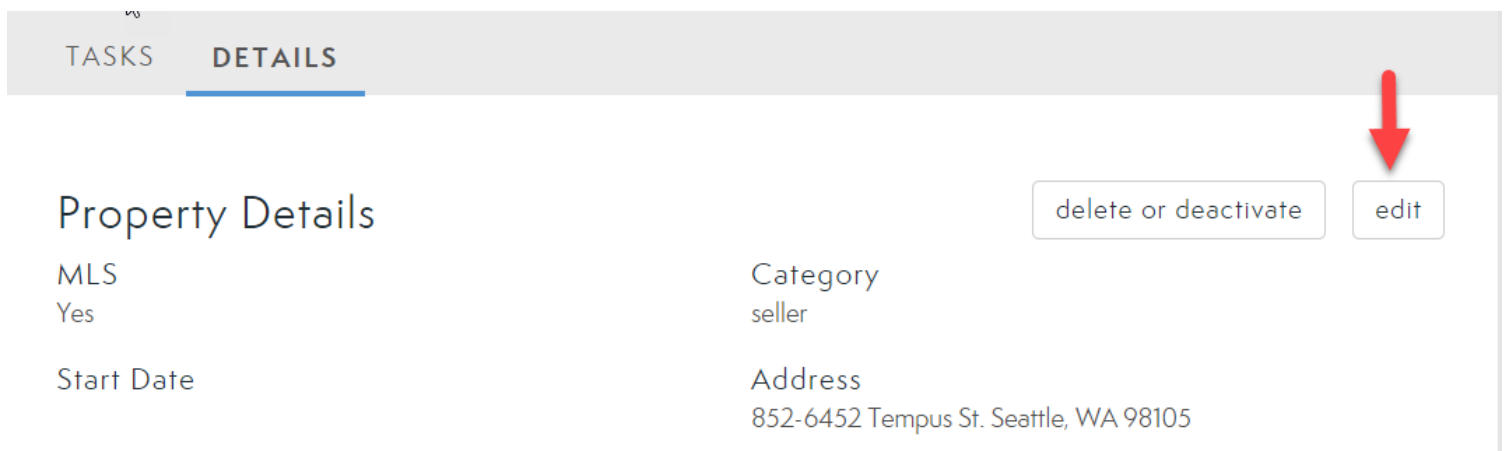
## Editing Transaction Details

1. On your client's transaction page, select the **Details** tab. This tab will only appear once the client has been moved to the Prospects section or further.



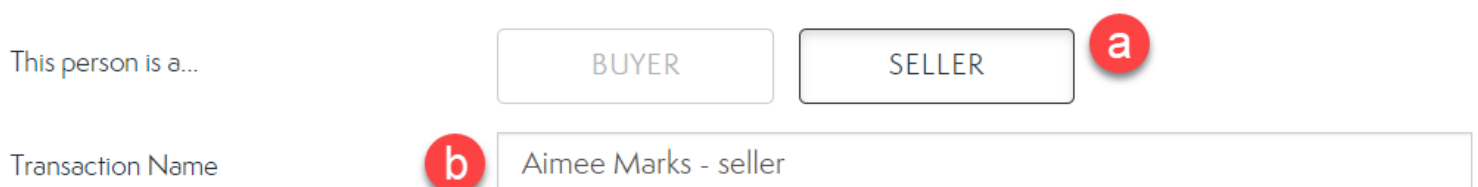
The screenshot shows a progress bar with four stages: 'marketing' (green, checked), 'prospects' (blue, star icon), 'actives' (grey), and 'pending' (grey). Below the bar, the name 'Aimee Marks - seller' is displayed. A button labeled 'MOVE TO ACTIVE ZONE' is visible. At the bottom, there are two tabs: 'TASKS' and 'DETAILS'. A red arrow points to the 'DETAILS' tab. Below the tabs, it says '15 tasks remaining' and there is an 'add task' button.

2. To edit any details in your transaction, select the **Edit** button.



The screenshot shows the 'DETAILS' tab selected. Under 'Property Details', there are two columns of information. The left column contains 'MLS' (Yes) and 'Start Date'. The right column contains 'Category' (seller) and 'Address' (852-6452 Tempus St. Seattle, WA 98105). To the right of the details, there are two buttons: 'delete or deactivate' and 'edit'. A red arrow points down to the 'edit' button.

3. Make as many edits as needed here including:
  - a. **Transaction Type**
  - b. **Transaction Name**



The screenshot shows two input fields. The first is 'This person is a...' with two buttons: 'BUYER' and 'SELLER'. A red circle with the letter 'a' is next to the 'SELLER' button. The second field is 'Transaction Name' with a text input containing 'Aimee Marks - seller'. A red circle with the letter 'b' is next to the input field.

**c. Listing Source (MLS v Non-MLS)**

**d. Address**

**c**  MLS  Non-MLS **i**

MLS #

Address **d**

City

State  **v**

Zip code

**e. Price (Target or Range)**

Price **e**

Target

Range  -

**f. Bedrooms**

**g. Bathrooms**

**h. Square Footage**

Bedrooms **f**

Bathrooms **g**

Square feet **h**

**i. Commission**

Commission **i**

Percent

Flat Fee

## j. Associated People

### Associated People j

Search for clients to add

Clients

Aimee Marks x

Type client's name



## k. DocuSign Transaction Room



Create a Transaction Room named **Aimee Marks - seller**

Save time by sending property, transaction, and contact info to DocuSign.

## l. Dotloop



Create a Loop named **Aimee Marks - seller**

Save time by sending property, transaction, and contact info to Dotloop.

## m. Additional Details

### Additional Details m

|

4. Select **Done** to save your changes.

Edit Prospects Transaction



DONE

CANCEL