Editing a Transaction

As you begin moving your person through the Sales Flow, you may need to edit your transaction details such as property address, target price, or commission rate.

To edit a transaction, follow the steps below:

- 1. Select the person and their transaction that you would like to edit Flow. In this example, Ahmed Meyers is selected (see above, indicated by the red arrow).
- 2. This brings you to the Profile Page for the selected person (see below).
- 3. Click the Details tab (see below, indicated by red arrow).

	marketing prospect active	
AMAL BARRY Buyer & Seller	Amal Barry - seller MOVE TO ACTIVE ZONE TASKS DETAILS NOTES	
▲ PROFILE	13 tasks remaining	edd tesk
Amal Barry - seller	upcoming	DUE
seller	Schedule Pre-Listing Interview	4/17/15

a. NOTE: If this person has multiple transactions, select the appropriate transaction and then click Details. In the example below there are two transactions associated with this person. A Buyer (see below, circled in red) and a Seller (see below, circled in blue).

	8 tasks remaining	add task
Amel Berry - buyer	this week	DUE
buyer	Conduct Meet-end-Greet	Fridey
Amel Berry - seller	Create Buyer's Presentation	Seturdey
seler	upcoming	

4. Click Edit (see below, indicated by red arrow).

	marketing	prospect active	pending
AMAL BARRY Buyer & Seller		Amal Barry - seller MOVE TO ACTIVE ZONE	
add transaction	TASKS DETAILS	NOTES	
	Property Details		edit deactivate
Amal Barry - seller	Non-MLS Yes	Category seller	
seler	Address	Target Price	

5. Edit the fields you would like to change (see below).

	Edit prospect tran	isaction
AMAL BARRY	This person is a	BUYER SELLER
add transaction	Transaction Name	Amal Barry - seller ×
PROFILE		MLS Non-MLS
Amal Barry - seller	Non-MLS transactions will re accounted for in your GCI ge	equire an address, close date, and sold price to ensure they're oal.
seller	Address	123 Main Street
Amal Barry - buyer	City	Seattle
buyer	State	WA

6. Click Done (see below, indicated by red arrow).

O Flat Fee
DONE CANCEL

You have now learned how to edit transaction details.