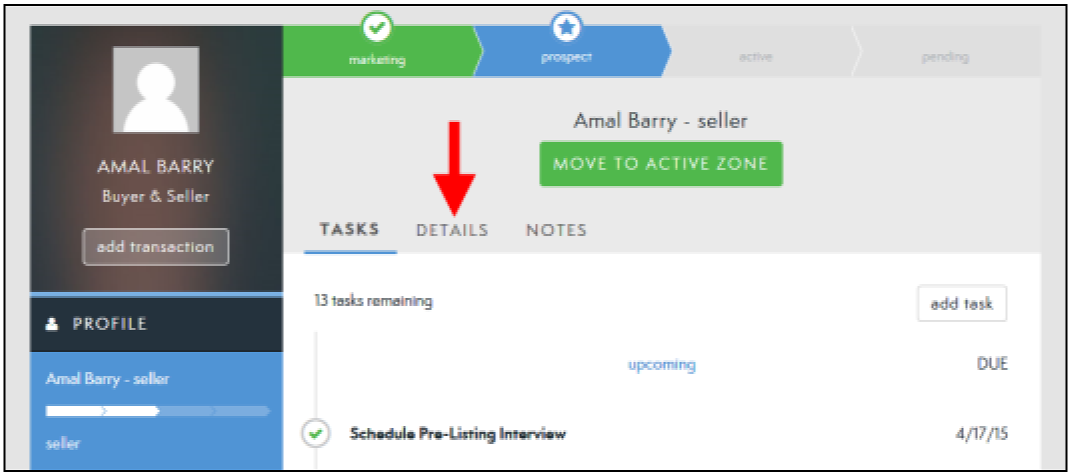
Editing a Transaction

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.

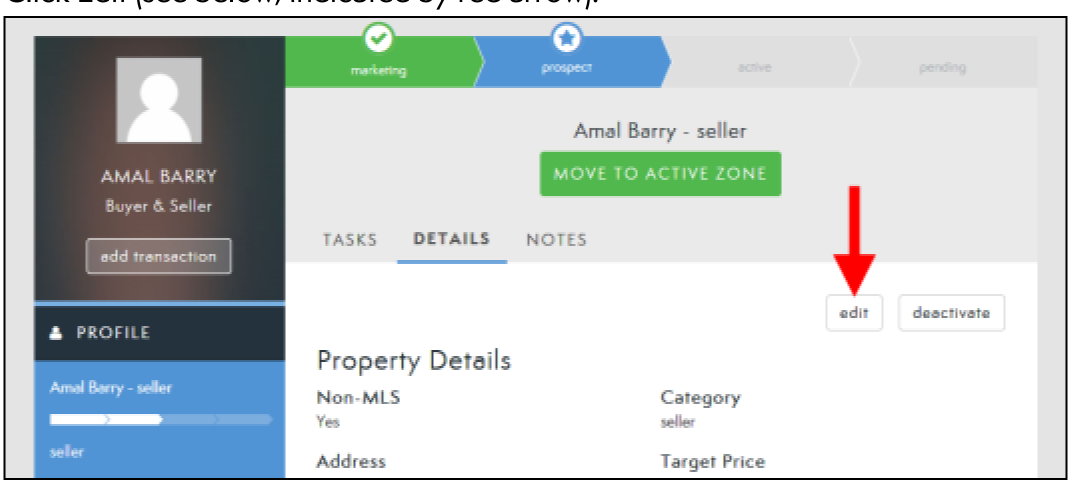
To edit a transaction, follow the steps below:

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).

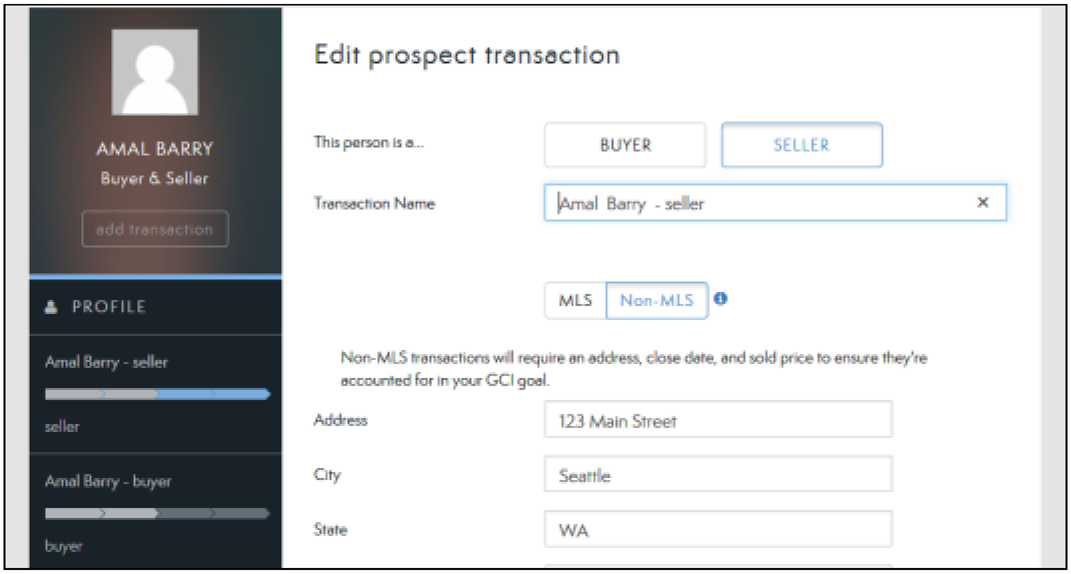


   a. NOTE: If this person has multiple transactions, select the appropriate transaction and then click Details. In the example below there are two transactions associated with this person. A Buyer (see below, circled in red) and a Seller (see below, circled in blue).

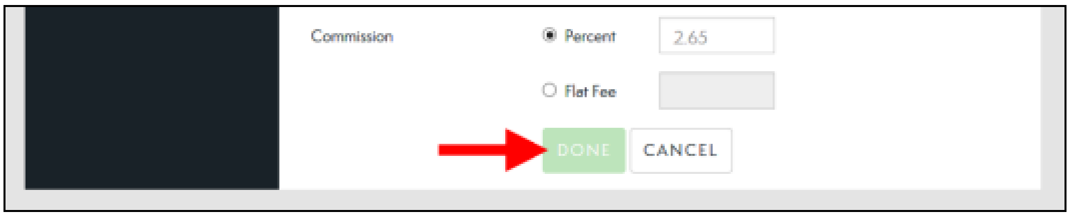
4. Click Edit (see below, indicated by red arrow).



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



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



You have now learned how to edit transaction details.