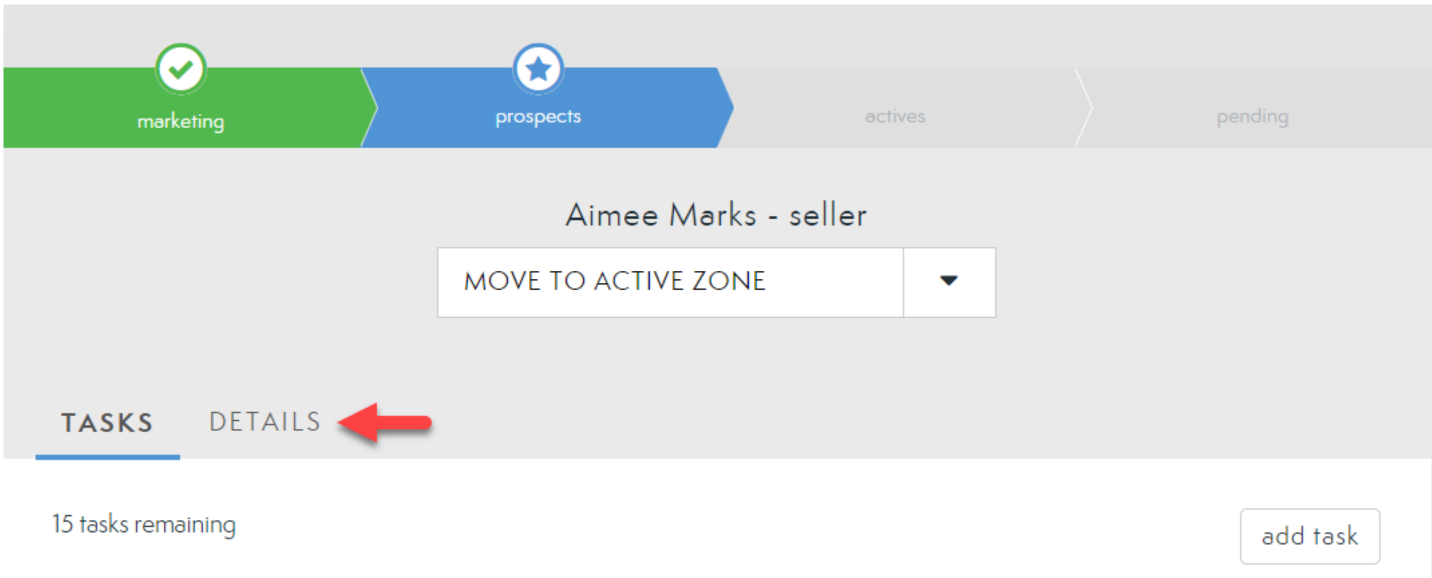
Editing Transaction Details

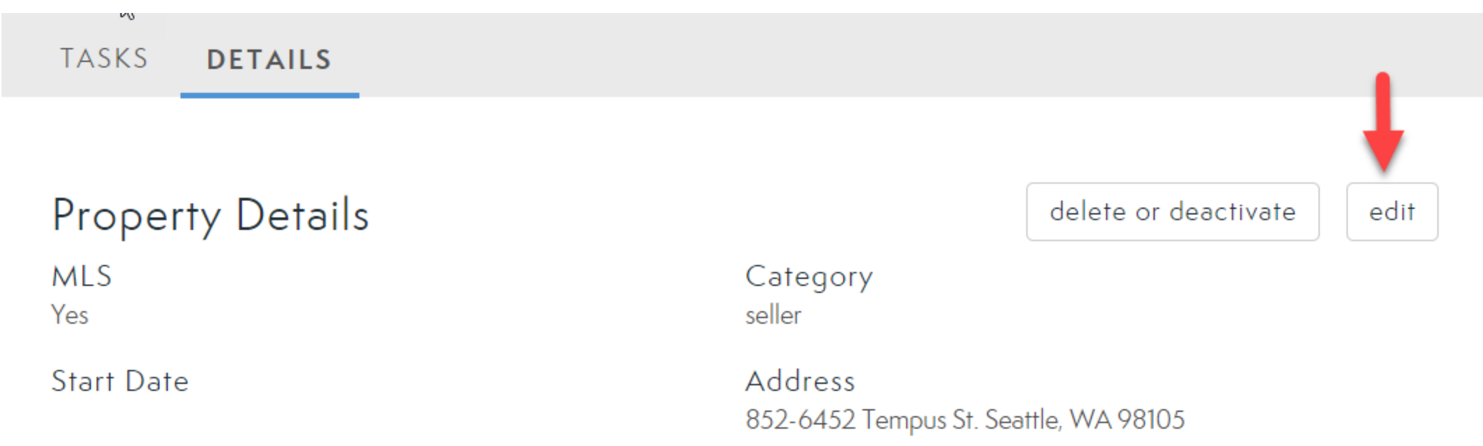
Each Sales Flow zone is a milestone for an individual person's progress towards a successful transaction. You can edit details or add notes at any time for each part of your transaction.

Editing Transaction Details

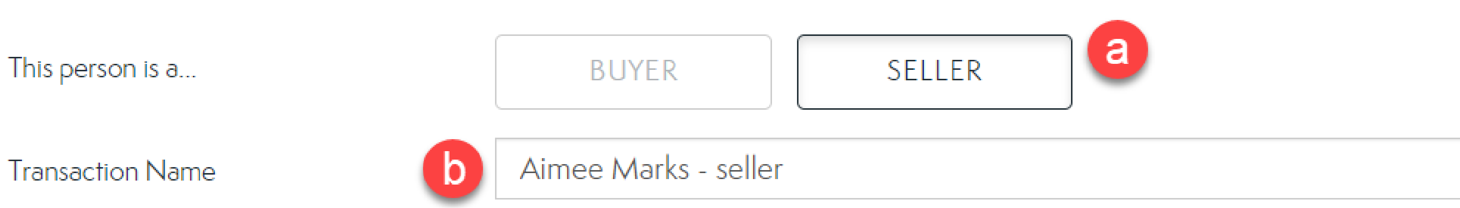
1. On your client's transaction page, select the **Details** tab. This tab will only appear once the client has been moved to the Prospects section or further.



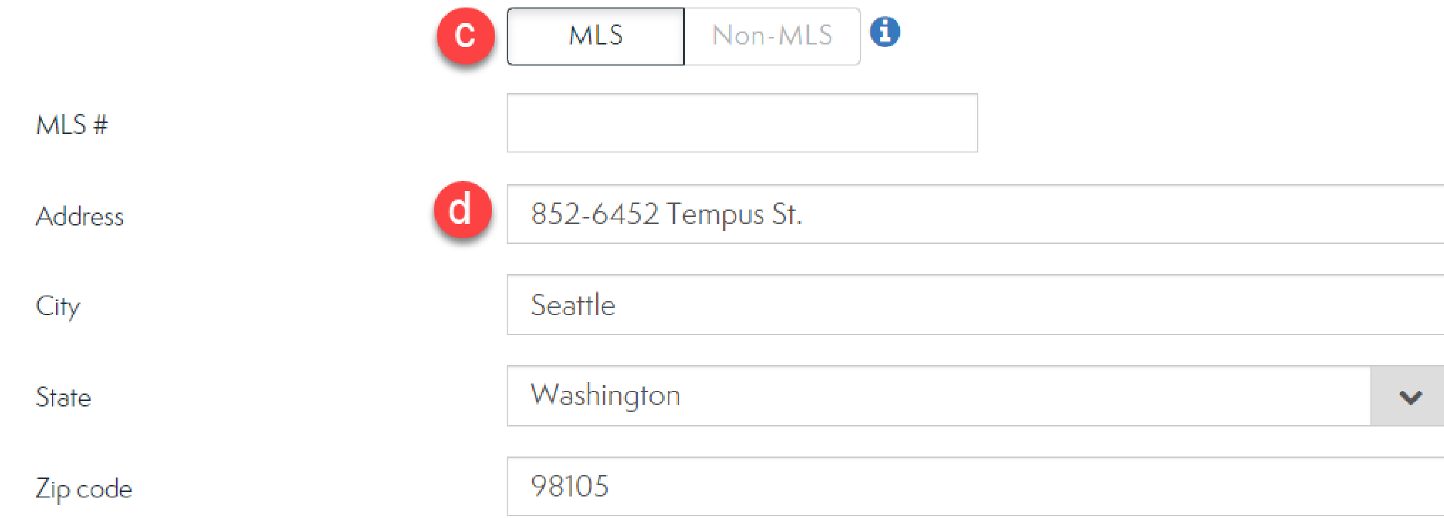
2. To edit any details in your transaction, select the **Edit** button.



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

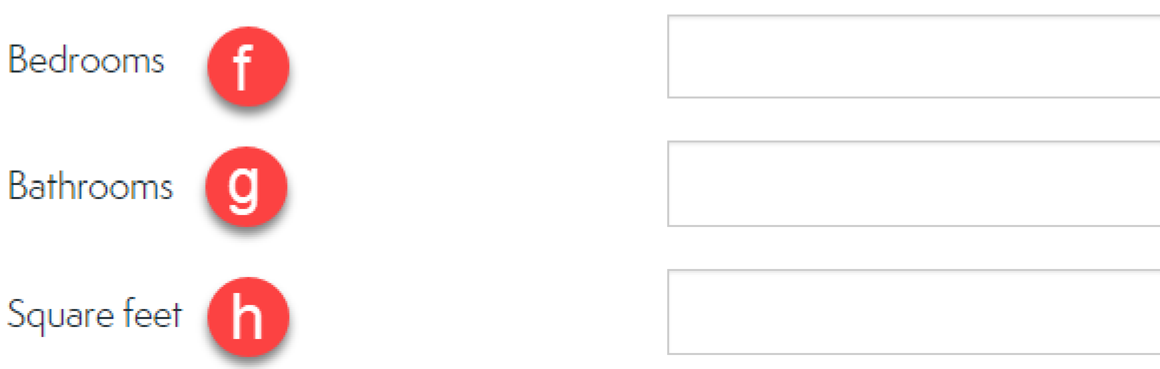


c. **Listing Source** (MLS v Non-MLS)
d. **Address**

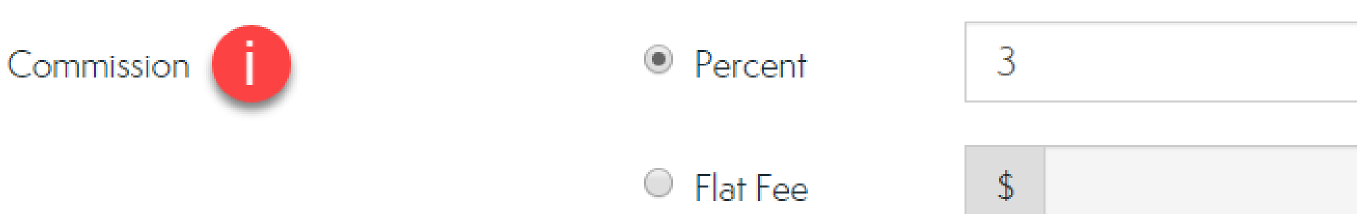


e. **Price** (Target or Range)

f. **Bedrooms**
g. **Bathrooms**
h. **Square Footage**



i. **Commission**



j. **Associated People**

Associated People

Search for clients to add

Clients — Aimee Marks × | 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

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