

Custom Formatting Help for Transaction Names

SUMMARY

Use this feature to promote standard transaction naming conventions by displaying customized instructions below the transaction name field.

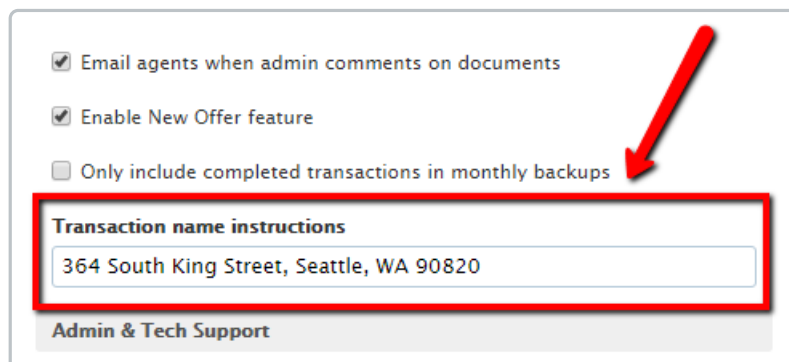
Short version: 1) Click your name in the upper right corner then "Admin / Settings." 2) Fill the transaction name instructions field with your own custom help text. 3) Click [Save] to finish.

🕒 :40

Edit the Help Message

The master admin on an account can edit the help message. Here's how:

- 1 **Go to Admin / Settings**
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 **Fill or edit the transaction name instructions field with your own custom help text.**
- 3 **Click [Save].**



☒ Email agents when admin comments on documents

☒ Enable New Offer feature

☐ Only include completed transactions in monthly backups

Transaction name instructions

364 South King Street, Seattle, WA 90820

Admin & Tech Support

The custom message will be shown in red under the transaction name field when creating or editing transactions.

Transaction Information

Save Transaction

Cancel

Location

Downtown Office

Transaction Name or Property Address

364 South King Street, Seattle, WA 90820

