

# 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.

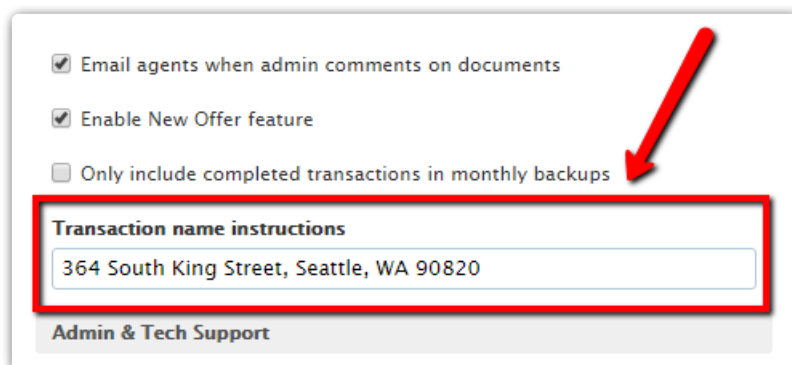
Short version: 1) Click your name in the upper right corner then "Admin / Settings." 2) Fill the transaction name instructions field with your own custom help text. 3) Click [Save] to finish.

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## Edit the Help Message

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

- 1 Go to [Admin / Settings](#) by clicking 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

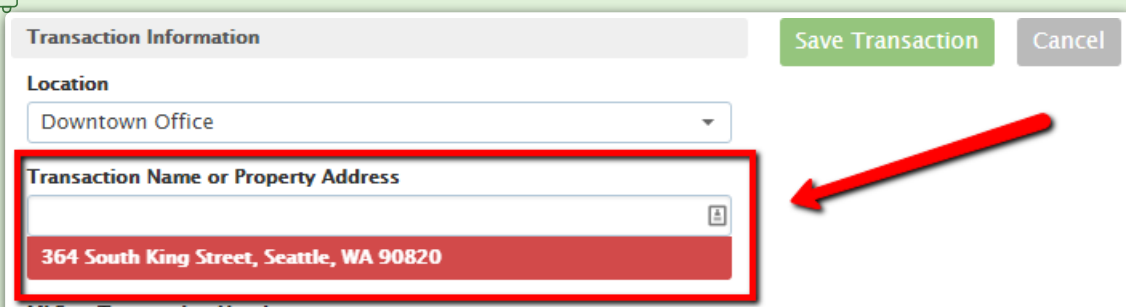
Only include completed transactions in monthly backups

**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

