

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.

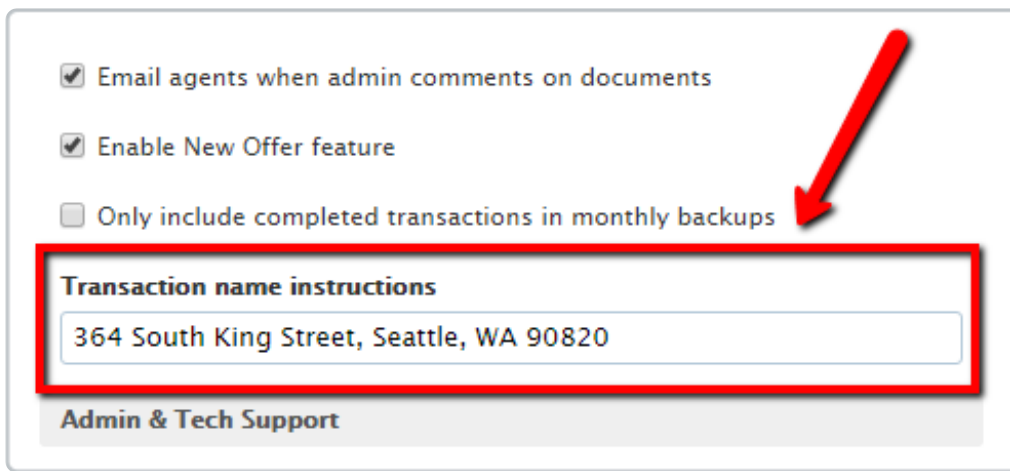
Short version: 1) Click your name in the upper right corner then "Admin / Settings." 2) Fill the transaction name instructions field with your own custom help text. 3) Click [Save] to finish.

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[Edit the Help Message](#)

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

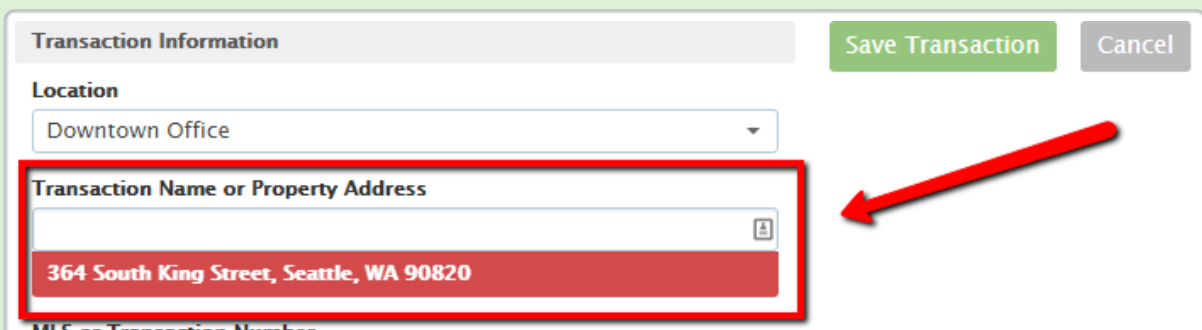
- 1 Click your name in the upper right corner then "Admin / Settings".
- 2 Fill or edit the transaction name instructions field with your own custom help text.
- 3 Click [Save].



A screenshot of the "Admin & Tech Support" settings page. It features three checkboxes: "Email agents when admin comments on documents" (checked), "Enable New Offer feature" (checked), and "Only include completed transactions in monthly backups" (unchecked). A red arrow points to the "Transaction name instructions" field, which is highlighted with a red border and contains the text "364 South King Street, Seattle, WA 90820". The "Admin & Tech Support" label is at the bottom.



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



A screenshot of the "Transaction Information" form. It includes a "Location" dropdown menu set to "Downtown Office" and a "Transaction Name or Property Address" text field. The text field is highlighted with a red border and contains the text "364 South King Street, Seattle, WA 90820" in red. A red arrow points to this field. To the right of the form are "Save Transaction" and "Cancel" buttons.