

How to add a new transaction and update an active transaction

It's important to notify us through the dashboard of new transactions **as soon as** a conditional offer is accepted.

Any **changes** to transaction details should be updated as soon as possible within the existing transaction you entered at the conditional offer accepted stage.

Providing transaction updates ensures our closing team is notified of any changes necessary to process your transaction, facilitating a smooth closing process while increasing your lead opportunities.

Adding a new transaction in the Houseful agent network dashboard

As soon as a conditional offer is accepted, add the transaction details to your dashboard.

In your dashboard:

1. Navigate to the leads profile and select the "update" button next to their name.
2. Once on the update screen, select "buyer made an offer" for a purchase, or "new listing agreement signed" to enter the sale of a property.
3. Enter the transaction information.
4. Click "save"

Updating a transaction in the Houseful agent network dashboard

As soon as transaction details *change*, update the details previously provided in the existing transaction.

In your dashboard:

1. Navigate to the leads profile and select the "update" button next to their name.
2. Once on the update screen, locate the deal and select "update details."
3. Update the necessary transaction information.

4. Click "save"

Learn more about how to handle listings and closings on your agent dashboard [here](#).