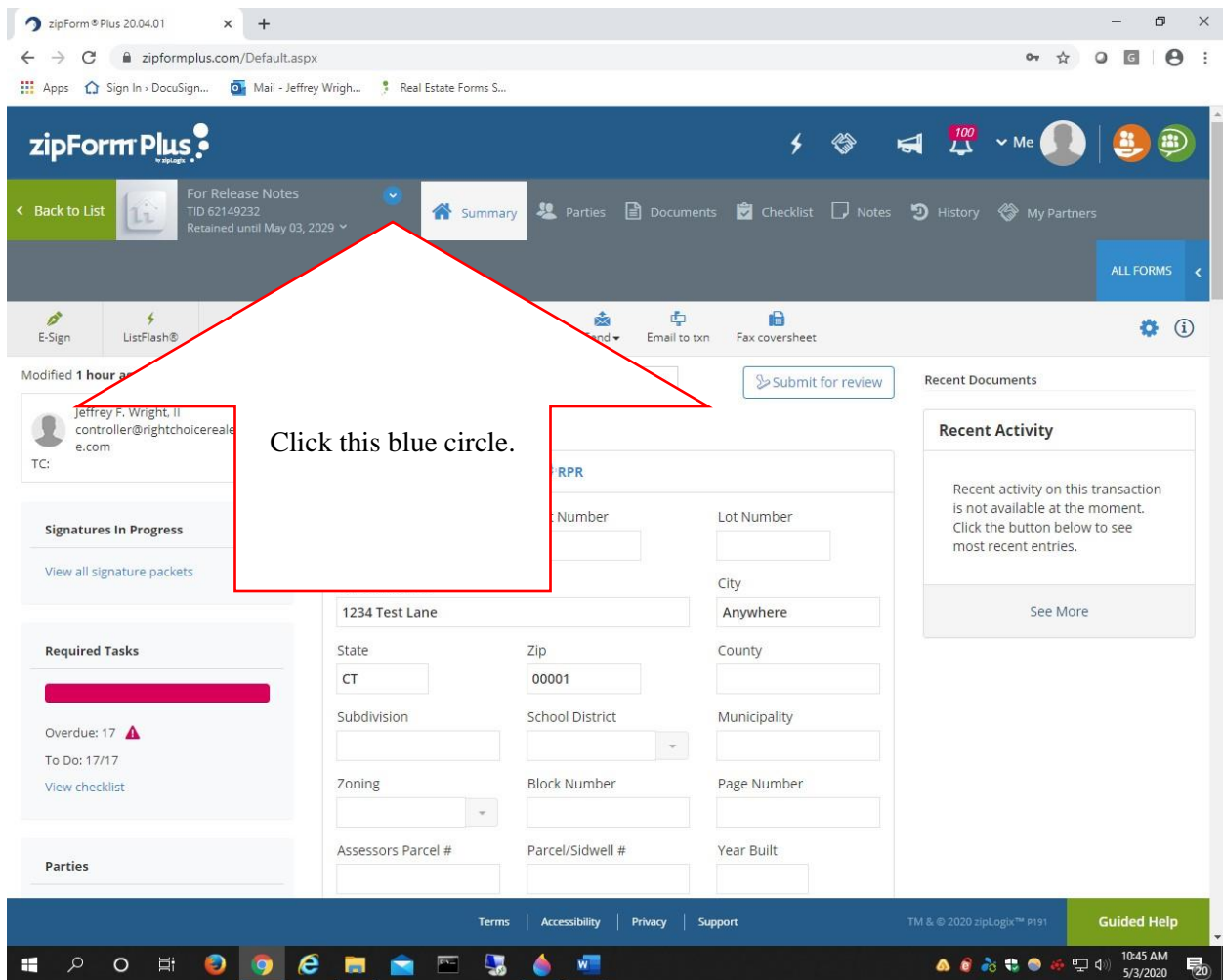


Copying a Transaction

What do you do when you have a listing, you put a deal together, and that deal falls through? You can “Copy” the old transaction, so you do not have to start from scratch.

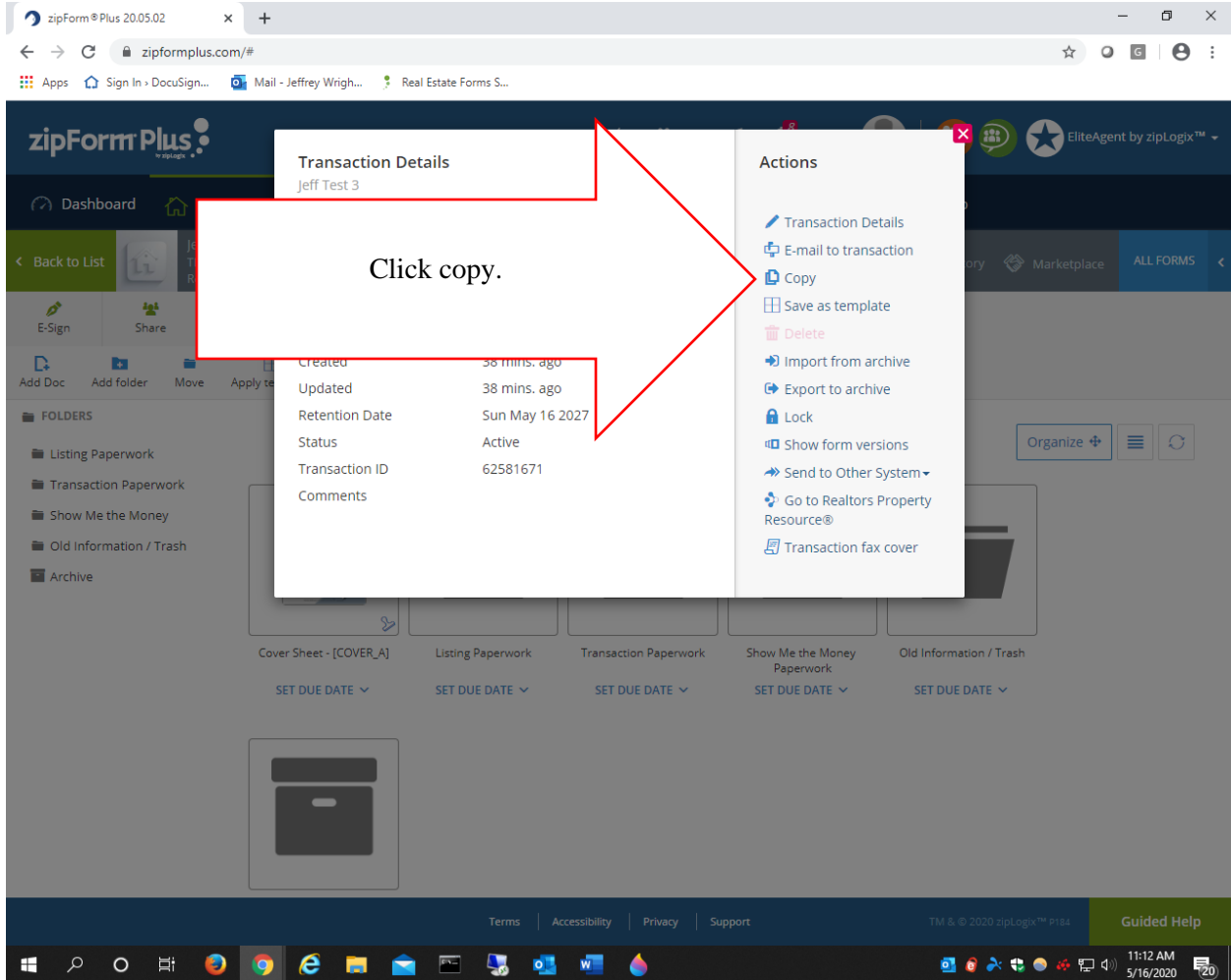
**Note: This is not a perfect solution, yet. Hopefully, it will improve as we go along, but it is a good start.*

1. From the “Summary” page of the transaction you need to copy, click in the blue circle next to the transaction name.



Copying a Transaction

2. From the “Actions Menu” choose “Copy.”



Copying a Transaction

3. You are led to a “New Transaction.”
4. Name the transaction anew. Add the date so everyone knows this is the newest edition of this specific transaction. Ex. 123 Main Street – 5/16/20.
5. Choose the items you want to have copy over.
 - a. **For now, understand that you may bring over documents you do not want to bring over. Put them in the trash folder if this happens.*

