

## How to edit a buyer profile

Adding a buyer to the platform is a great way to market your buyers' needs to other agents 24/7. However, what if those needs change? Find out how to update a buyer's profile below!

1. From the dashboard, select the My Buyers tab at the top. Alternatively, if you can see your buyer in your dashboard, you can hover on the settings icon and select "Update" from the drop-down list.

The screenshot shows the Buyside dashboard interface. At the top, there are navigation tabs: Dashboard, Marketing Suite, BMA, My Listings, My Buyers (highlighted), Find, and Add. The user profile 'Joe Broker' is visible in the top right corner. The main content area is divided into several sections:

- My Buyers (1)**: A section with an 'Add Buyer' button. It displays a buyer profile for 'Tommy Buyer' with ID 5539913, a 5-star rating, and location 'Livermore, CA 94551 (Alameda County)'. The profile shows 'Matches' (0 MLS, 0 NonMLS) and 'Purchase by' (Jun 19, 2020). A settings icon is present, and a red arrow points to a dropdown menu with 'Update' and 'Archive' options.
- My Listings (3)**: A section with an 'Add Listing' button. It contains a table with columns 'Listing', 'Matches', and 'Emails'. The table lists three 'Coming Soon Listing' entries:

Listing	Matches	Emails
Listing ID: CSL-384357 Coming Soon Listing	0	0
3649 Worthinton Rd Collegeville, PA 19426 Listing ID: CSL-656957 Coming Soon Listing	1	0
835 Karlyn Ln Collegeville, PA 19426 Listing ID: CSL-419148 Coming Soon Listing	2	2

On the right side of the dashboard, there are 'Notifications' (1 New Message), 'Valuations' (Last 30 days), and a 'Get More Leads' button. A large green circle highlights '4 Valuation Attempts' with a 'VIEW' button. Other metrics show 0 Leads and 0 Monthly Reports.

2. From the My Buyers tab, select one of the two "Edit" buttons next to the buyer that you want to update.

[BuySide](#)

[Dashboard](#)
[Marketing Suite](#)
[BMA](#)
[My Listings](#)
[My Buyers](#)
[Find](#)
[Add](#)
Joe Broker

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[My Buyers](#) | **My Buyers**

[Advanced Search](#)

My Buyers 1
My Inactive Buyers 5

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20 per page

Buyer	Listing Matches	Emails	Lead Source	Desired Criteria	Desired Purchase Date
<b>Tommy Buyer</b> Buyer ID: 5539913 ★★★★★	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">0 MLS</div> <div style="text-align: center;">0 NonMLS</div> </div>	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> 0</div> <div style="text-align: center;"><input type="checkbox"/></div> </div>	Added directly to Buyside	Buyer is looking in Livermore, CA 94551 (Alameda County) <span style="color: blue; font-weight: bold;">(+)</span> for a 3+ Beds, 2.0+ bath around \$999,000 <span style="color: blue; font-weight: bold;">(EDIT)</span>	Jun 19, 2020 <span style="color: red; font-weight: bold;">(EDIT)</span> <span style="border: 1px solid gray; padding: 2px 5px; border-radius: 3px;">ARCHIVE</span>

3. Update the profile with the new information. Then, scroll down and select **“Update Buyer”**.

**Financials**

Qualification Status\*  Pre-Qualified  Cash  None

Minimum price (\$) 
Maximum price (\$)

Available Downpayment (\$) 
Approx. Monthly Payment (\$)

Purchase By\* (Expiration date)

Type of Buyer\*  First Time Home Buyer  Owner - Must Sell First  Owner - No need to Sell First  Currently Renting  Investor  Relocation

Method of Payment  FHA Loan  Conventional Financing  Seller Financing  Rent-to-Own/Lease Purchase  VA Loan  203k loan  1031 Exchange  USDA Financing

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**Buyer Details** (this info is only seen by you)

Send alerts when a new Coming Soon Listing is added that matches my buyer's criteria
  Do Not Alert me or my client
  ALERT ME
  ALERT MY CLIENT DIRECTLY and CC me.

First Name / Nickname / BuyerID 
Last Name

Primary Email 
Primary Phone

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