

Creating a User Defined Document

- From the log in page of Document Storage or the link from within NTREIS Listings go to Document Storage. You will be on the 'Home' page. Search for the folder/transactions you wish to add a document.

You will learn how to:

- Create a customized "User Defined" document

Your REALTOR[®] Association can provide more support/training. [Contact your Association](#)



Home | My Document Folders | Search Office/User | Contacts | Settings | Help | Log Off

Create a New Document Folder • Close Document Folders • To Do List

My Document Folders

[Office Document Folders](#)

Search

To search for a Document Folder, enter some information about the Document Folder, such as the Document Folder name, MLS number, address or a participant name in the field below.

Search Criteria:

Filter By: Status Active Roles All Roles

- To add a document, click on the **Add New Doc** link.


Home | My Document Folders | Search Office/User | Contacts | Settings | Help | Log Off

Summary • Things To Do • Participants • Services • Messages • Data Forms • Activity Log

Summary

[Status Report](#) [Archive Report](#) [Import/Update](#) [Admin](#) [Public Documents](#) Messages: 0 new

1020 Country



Property Address: 1020 Country, Fairview, Collin County, TX 75069-8788
 Property Type: 1, Single Family Total Baths: 4.1
 Document Folder Type: Property Beds:
 Document Folder Status: Active Listing Date: 4/12/2010
 Phase: Prs_Sale List Price: 1049990
 Square Footage:

[Create Coversheet\(s\)](#) [Upload Doc\(s\)](#) [Create Doc Package](#) [Add New Doc](#)

Documents Available to View

<input type="checkbox"/> Name	Type	Comment	Upload Date	Rev	MLS View	Public View	↕
<input type="checkbox"/> Seller's Disclosures ▼	Disclosure	Yes	4/21/2010	1	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> 1-4 Family Resid Contract TAR - 1601 ▼	Contracts	Yes	9/7/2010	1	<input type="checkbox"/>	<input type="checkbox"/>	✓
<input type="checkbox"/> Floor Plan ▼	Listing Agreement		9/8/2010	1	<input type="checkbox"/>	<input type="checkbox"/>	●

- Select the User Defined option for those documents that are not listed in the drill down menu. You will be taken to the Document Settings area to set permissions.

- Enter a document name, select a document type from the drop down list and set View, Upload and Own document permissions. Finally select any applicable document options and click **Save Changes**. You may also check to automatically notify the participants of the document that needs to be viewed.

Role	View	Upload	Remove	Document Owner	Approver
Appraisal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buyer's Attorney	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escrow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escrow / Title Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazard Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Inspection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Need more help? Contact your Association/MLS Provider for training.

- Now you can Upload your document, create a fax coversheet or create a Document place holder to upload or fax the document at a later time.

Add a Document

[Document Settings and Permissions](#)

1020 Country

Name: test user defined

MLS View. Make this document available to any member of your MLS

Public View. Make this document available to the Public

Warning: By choosing this option the document may be available to users outside of NTREIS Document Storage

Select an upload method for this document and click **Next** to continue.

Upload now

To locate the document on your computer, click the **Browse** button. Select the document, and click **Open**. Large documents may take several minutes depending on your internet connectivity. File size is limited to 10 megabytes. Comments are optional.

File:

Comment:

Print a coversheet and fax the document into the system

Create a placeholder for the document and upload it later