

CREATING A DOCUMENT PACKAGE

- 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. From this page search and click on the Subject property.




- Once you have selected the Subject Property click on the **Create Doc Package** link. This will allow you to choose which documents you would like to put in a 'package' to aid in your closing files, or consolidate certain documents in a group or folder.

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
Document Folder Type: Property
Document Folder Status: Active
Phase: Pre Sale

Total Baths: 4.1
Beds:
Listing Date: 4/12/2010
List Price: 1049990
Square Footage:

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

<input type="checkbox"/> Name	Type	Comment	Upload Date	Rev	MLS View	Public View
<input type="checkbox"/> Seller's Disclosures ▾	Disclosure	<u>Yes</u>	4/21/2010	1	<input type="checkbox"/>	<input type="checkbox"/> ✓

You will learn how to:

- When closing a file create a document package for all documents - allowing for electronic storage.

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

- In the Document Package page you may select the documents you wish to include in the package and also select the order you wish them to appear.

The Document Packaging process will take the selected files and convert them into a single document

Step 1: Select Documents To package

Include File	Name	File Type	File Size	Upload Date
Select All				
DeSelect All				
<input checked="" type="checkbox"/>	Floor Plan	Microsoft Word	3387 K	9-08-10
<input checked="" type="checkbox"/>	1-4 Family Resid Contract TAR - 1601	Microsoft Word	23 K	9-07-10
<input checked="" type="checkbox"/>	Seller's Disclosures	Microsoft Word	23 K	4-21-10

Step 2: Order Documents To package

Floor Plan
1-4 Family Resid Contract TAR - 1601
Seller's Disclosures

- You may select your delivery options by choosing to allow the system to email you the report or wait for the PDF package to generate. You have the option to store the package within the Transaction, add the package as a new document, or revise an existing document in the transaction.

Step 3: Select Delivery Options

E-mail Report

A link to the report will be sent to the e-mail address(es) below. Recipients will be required to login to NTREIS Document Storage in order to access the report.

My E-mail

Other E-mail

Wait for the PDF package to generate

Step 4: Select Upload Option

Do Not Store this Document Package in the Transaction

Add this Document Package as a New Document to the Transaction

Revise an Existing Document in the Transaction with this Document Package