



24/7 online technical support

You will learn how to:
➤ To add a to do list item

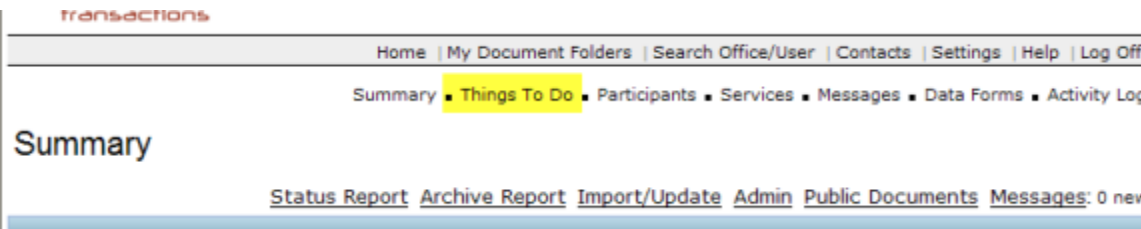
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TO DO LISTS: ADDING A TO DO LIST ITEM

- 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.



- From the summary page of the Subject property click on **Things To Do** on the top navigation bar.



- From here you may **Add New To Do**, or **Edit To Do List** already existing.



- Enter the **Description**, select a **Type** and **Category** from the drop down lists and enter a **Due Date**. Select all the parties (their roles in this transaction) you would like to give access to see and/or complete the task item by highlighting their name on the available roles section. Click **Save** when finished.

Add New To Do

Complete the information below to create your new To Do Item. When you have completed the information click **Save**. To exit this screen without saving changes click **Cancel**.

* Required fields

To Do Information

Description:

Type: Select Type... *

Category: Select a Category... *

Due Date Dependency:

Transaction Date: # Days Before ▼ ▼

To Do: # Days Before ▼ ▼ Due ▼

Calendar Date:

Security

Add Roles to the Permissions List to allow participants to view and complete this To Do Item.

Available Roles		Permissions List
<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Appraisal Buyer Buyer's Attorney Document Approver Escrow Escrow / Title Assistant Hazard Insurance Home Inspection Home Warranty Lender </div>	<div style="margin-bottom: 5px;"><input type="button" value="Add"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Remove"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Add All"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Remove All"/></div>	<div style="border: 1px solid #ccc; width: 100%; height: 100%;"></div>
<input type="checkbox"/> Check here to allow all Participants to view this To Do Item. Participants with view and complete rights:		

- The item will be added under the **Things To Do** section