ntreis doc storage

24/7 online technical support

TO DO LISTS: UPDATING CUSTOMIZED TO-DO

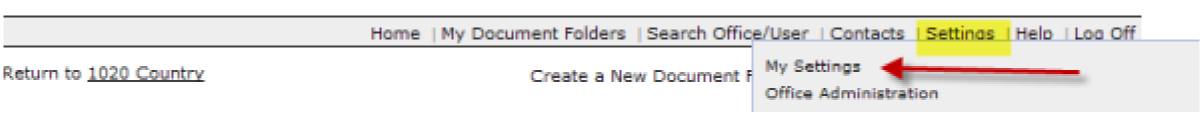
There are three ways to access your existing Document Storage folders. From the ***Add/Edit*** menu or **M**y **Tools** menu select a listing and click the ***Document Storag****e* link. Or click the ***Transactions*** icon on the menu bar and select **Document Storage.**

You will learn how to:

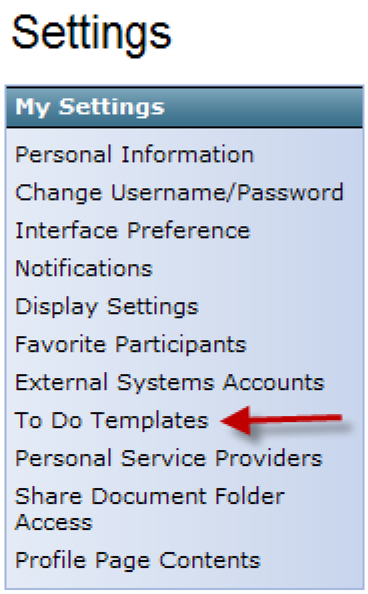
- **Update Customized To Do Lists**

Your REALTOR ®Association can provide more support/training.
Contact your Association

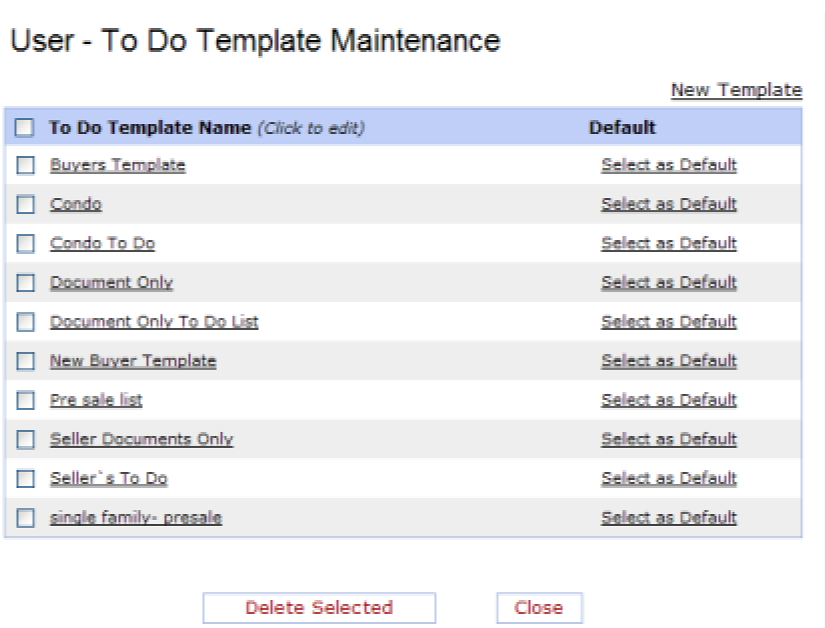
From the Home Page hover over **Settings.**   For the agent, choose **My Settings**, if you are wanting to edit an Office Template as an office admin, choose Office Administration (to see Office Templates go to Office Administation help)



Select **To Do Templates** from the **My Settings** section.



Click on the To Do Template you wish to update. (Note: each template will need to be updated separately.)



Once you have chosen the template you wish to edit, select the item, or items that need updating, deleting or even adding new items. Reset the permissions roles for each new edit if needed and save each new or edited item be sure to click **Delete Selected** (if there were items to delete) and **Close** window.