

TO DO LISTS: UPDATING CUSTOMIZED TO-DO

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

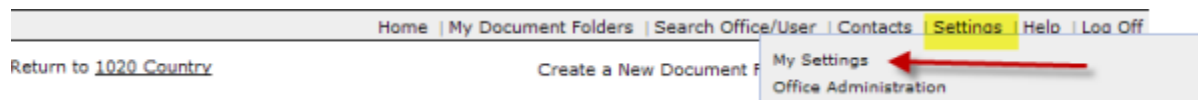


You will learn how to:

- Update Customized To Do Lists

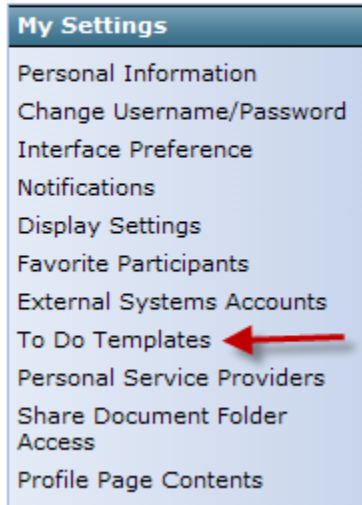
Your REALTOR® Association can provide more support/training. [Contact your Association](#)

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 Administration help)



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

Settings



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

User - To Do Template Maintenance

[New Template](#)

<input type="checkbox"/> To Do Template Name <i>(Click to edit)</i>	Default
<input type="checkbox"/> Buyers Template	Select as Default
<input type="checkbox"/> Condo	Select as Default
<input type="checkbox"/> Condo To Do	Select as Default
<input type="checkbox"/> Document Only	Select as Default
<input type="checkbox"/> Document Only To Do List	Select as Default
<input type="checkbox"/> New Buyer Template	Select as Default
<input type="checkbox"/> Pre sale list	Select as Default
<input type="checkbox"/> Seller Documents Only	Select as Default
<input type="checkbox"/> Seller's To Do	Select as Default
<input type="checkbox"/> single family- presale	Select as Default

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.