

TO DO LISTS: ADDING TO DO'S FROM A TEMPLATE

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:

- Add a To Do From a Template

Your REALTOR® Association can provide more support/training.

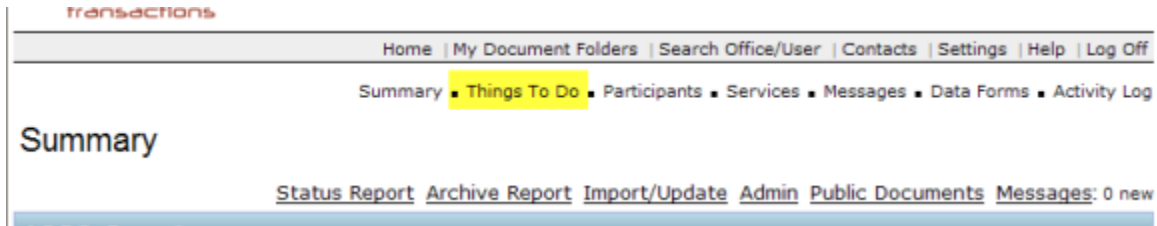
[Contact your Association](#)



If you accessed it from **My Tools** or **Add/Edit** you will be taken directly to the document folder for the listing you selected. If you accessed **Document Storage** from the top menu bar in Tempo, you will see a list of document folders, choose the one you want to add a to do list to.



Once on the folder's **Summary** screen click the **Things To Do** link.



Click on the **Add From Template** link.



Select the Template you wish to use from the pull-down list and enter the required date(s), then click **Next**.

Add To Dos

Select the Template you wish to apply to this Document Folder, enter the required dates, and then click **Next**.

Template: *

Select a template

Condo

1020 Co... Document Only

Listing Da... Document Only To Do List

Listing Da... Listing Contract Pending

Pre sale list

Pre Sale To Do List

Quick Pre Sale To Do List

Seller Documents

Seller Documents Only

single family- presale

* Required Fields

*

Cancel Next

Review the list of To Do items. Check the pre-assigned due dates and modify if necessary. Click **Finish**. Your To Do list has been added.