ntreis doc storage

24/7 online technical support

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.**

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.

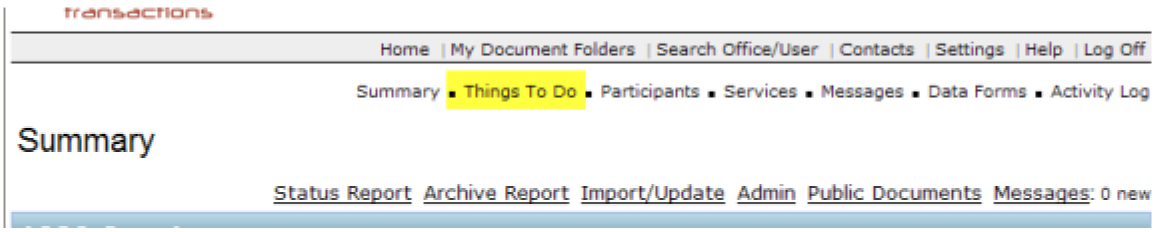
You will learn how to:

- **Add a To Do From a Template**

Your REALTOR ®Association can provide more support/training.

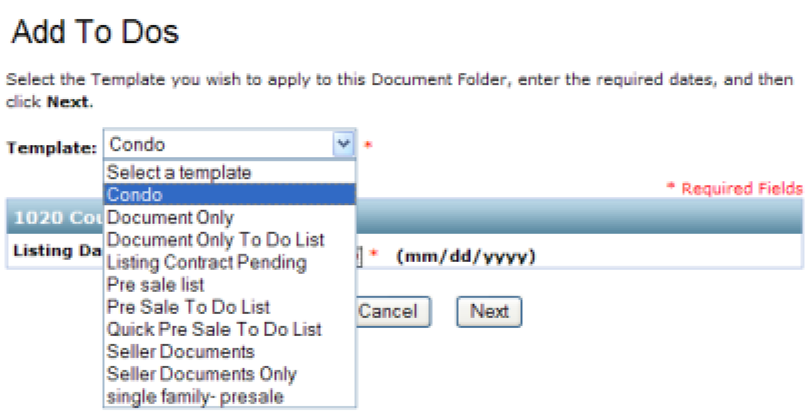
[Contact your Association]

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.***



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