



Office Admin: Creating an Archive Report

- 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



The screenshot shows the 'My Document Folders' section of the NTREIS Document Storage interface. It includes a search bar with the text 'Search Criteria:' and a search button. Below the search bar, there are filter options for 'Status' (set to 'Active') and 'Roles' (set to 'All Roles'). The page also features a navigation menu with links for 'Home', 'My Document Folders', 'Search Office/User', 'Contacts', 'Settings', 'Help', and 'Log Off'.

- From the Summary Page, click on the **Archive Report** link



The screenshot shows the 'Summary' page for a property. At the top, there is a navigation menu with links for 'Home', 'My Document Folders', 'Search Office/User', 'Contacts', 'Settings', 'Help', and 'Log Off'. Below the menu, there are several links: 'Summary', 'Things To Do', 'Participants', 'Services', 'Messages', 'Data Forms', and 'Activity Log'. The main content area features a header for '1020 Country' and a list of links: 'Status Report', 'Archive Report', 'Import/Update', 'Admin', 'Public Documents', and 'Messages: 0 new'. The 'Archive Report' link is highlighted in yellow. Below the links, there is a small image of the property and a table of details:

Property Address:	1020 Country, Fairview, Collin County, TX 75069-8788		
Property Type:	1. Single Family	Total Baths:	4.1
Document Folder Type:	Property	Beds:	
Document Folder Status:	Active	Listing Date:	04/12/2010
Phase:	Pre Sale	List Price:	1049990
		Square Footage:	

You will learn how to:

- Create an Archive Report for a closed transaction.

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

- In the **Archive Report** screen follow the steps to determine which sections to include, choose the branding and your delivery method. Then click **Generate Report** .

Archive Report

The Archive Report allows you to create a document which contains any or all portions of your Document Folder. This process will also package the selected documents with the other report sections.

Step 1: Select Type of Report to Run

Choose a View: 

Step 2: Select Sections to Include in the Report

<input checked="" type="checkbox"/>	Section	Description
<input checked="" type="checkbox"/>	Cover Page	Company Logo, Name, Address, Branding
<input checked="" type="checkbox"/>	Documents	List of all Documents and Copy of Selected Documents
<input checked="" type="checkbox"/>	Document Audit Logs	List of Document Activity
<input checked="" type="checkbox"/>	Participants	All People Who Had Access to the File
<input checked="" type="checkbox"/>	To Dos	All To Do's
<input checked="" type="checkbox"/>	Service Orders	All service Orders
<input checked="" type="checkbox"/>	Activity Logs	All Logged Activity
<input checked="" type="checkbox"/>	Data Forms	All Additional Data Entered
<input checked="" type="checkbox"/>	Messages	All Messages Sent and Received

Step 3: Select Documents to Include in the Report

<input checked="" type="checkbox"/>	Name	File Type	# of Revs	File Size	Include all Revisions	Last Upload Date
<input checked="" type="checkbox"/>	Seller`s Disclosures	.doc	1	24064	<input type="checkbox"/>	4/21/2010 9:15:24 AM
<input checked="" type="checkbox"/>	1-4 Family Resid Contract TAR - 1601	.doc	1	24064	<input type="checkbox"/>	9/7/2010 5:10:12 PM
<input checked="" type="checkbox"/>	Floor Plan	.doc	1	3468800	<input type="checkbox"/>	9/8/2010 8:11:27 AM

- If you chose to wait for the PDF package, do not close the window until the report has been generated

