

## How to Set Up Your Default Participants:

If you wish to add a Default Participant, such as a personal assistant for every transaction, You may automatically add the participants you have predetermined every time you create a new transaction. Please note the following directions.

### STEP 1:

Go to you Home Page and click on Settings:

Home | My Files | Search Office/User | Contacts | Settings | Help | Log Off

Create a New File | Close Files | To Do List

Welcome

**My Files** | **Things To Do Today**

### STEP 2:

Click on Favorite Providers on your Settings page:

Home | My Files | Search Office/User | Contacts | Settings | Help | Log Off

User Settings

**My Settings**

- [Personal Information](#)
- [Notifications](#)
- [Display Settings](#)
- [Favorite Providers](#)
- [External Systems Accounts](#)
- [To Do Templates](#)
- [Personal Service Providers](#)
- [Share File Access](#)
- [Profile Page Contents](#)

My Settings	
<b>Personal Information</b>	Edit personal information such as your phone numbers or e-mail address.
<b>Notifications</b>	Select how you will be notified when you are added to a new file, when file changes are made, or when services are ordered.
<b>Display Settings</b>	Select the number of file-related items to display on your Home and File Summary pages.
<b>Favorite Providers</b>	Displays a list of your favorite providers, including their contact information.

### STEP 3:

You will need to make sure your default participant is in your “Favorite Providers” (see the Quick Reference Guide for Adding Favorite Providers/Participants- go to <http://www.ntreis.net/technical/transactions.asp> -Click on “Getting Started”-) and from there you can set the “roles” that will automatically add this participant every time you create a new transaction.

#### Your Favorite Providers and Participants

Add or Delete favorite providers and participants. Choose the participants and roles that will be automatically added as defaults when you create transactions.

**\* Deleting will remove every instance of that person as a favorite.**

Add Favorite

Name/Role(s)	Office	When you create a file using this role:	Automatically add this person as a participant with this role:	Delete
Kevin ( Listing Personal Assistant , Selling Personal Assistant )	Kevin Transaction Coordinator  Arlington , TX 76016	Select Your Role... Select Your Role... Any Role Listing Agent Selling Agent		<u>delete</u>

Note that it will set up the default participant to go with every new file. Whenever you, as the agent, have the role as either the Listing Agent or Selling Agent (Buyer’s Agent) – you must select one- the next step will allow you to create the corresponding role for your participant.

### STEP 4:

Complete the final step. Select the corresponding role for the participant. Note you, the agent, are working as a “Selling Agent” you may create the role for your participant, as the Selling Personal Assistant, as an example. Save your work, and you are set up.

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Kevin ( Listing Personal Assistant , Selling Personal Assistant )	Kevin Transaction Coordinator  Arlington , TX 76016	Selling Agent Select Your Role...	Select Their Role... Select Their Role... Listing Personal Assistant Selling Personal Assistant	<u>delete</u>

