

Getting Started: Adding Favorite Providers/ Participants

1. Hover on the **Settings** link and choose **My Settings**



You will learn how to:

- Add your favorite providers
- Add your default participants

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

2. Click on the **Favorite Participants** link.

Settings



- On the Favorites page, click on **Add Favorites** link. Search for your favorites by participant or office.

Your Favorites

Add or Delete favorite 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.**



Providers and Participants				
Name	Office	When you create a Document Folder using this role:	Automatically add this person as a participant with this role:	Delete

- After finding your favorites, click on the **Add to Favorites** link. If you wish to set up automatic participants to each transaction click on the **Back to Favorites** link.

Office Roster

The following users are available from the office selected below.
 If you are looking for a user in another office click **Refine Search** and enter your search criteria

NTREIS OFFICE
 1950 Stemmons Fwy. Ste. 3018
 Dallas, TX 75207

[Back To Favorites](#) [Refine Search](#) [Enroll New User to this Office](#)

Name	Photo	Action
Cocklin, Cindy		Add to Favorite

- You can have the system automatically add favorite participants to files so a user is automatically added to a file whenever you create a new transaction as a certain role. For example, you can have it automatically add your Assistant anytime you are an agent in the transaction. Or have the system automatically add your broker. Select your role and then select the role you want the system to add your favorite in. You will need to make sure your default participant is in your "Favorite Providers" and from there you can set the 'roles' that will automatically add this participant every time you create a new transaction. 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.

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		delete

- 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.

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.

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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	Selling Agent Select Your Role...	Select Their Role... Select Their Role... Listing Personal Assistant Selling Personal Assistant	delete

Need more help? Contact your Association/MLS Provider for training.

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