

Adding a To Do List Item (From the File Summary Page)

Quick Reference Guide

1. Go to the logon page and enter your user name and password then click *Logon*

2. From the Home page click on the subject property

The screenshot shows a web page with two main sections: 'Public Document Site' and 'Registered User's Logon'. The 'Public Document Site' section has an 'Address Code' input field and a 'View' button. The 'Registered User's Logon' section has 'Username' and 'Password' input fields, a 'Logon' button, and a link for 'Forgot your password? Click here'. Below these sections are links for 'Browser settings' and 'Copyright © 2008 MarketLink'.

The screenshot shows a user dashboard for 'Jack Johnson'. It features a 'My Files' table with columns for 'Name' and 'Tracking ID'. The first row is '6812 Front Street' with tracking ID '1316 MAPLE 45', which is circled in red. Below this is a 'Things To Do Today' table with columns for 'Due', 'Description', and 'File Name'. The first row is '9/11/2004 Put on Lock Box' with file name '1316 MAPLE 45'. Below that is a 'My New Messages' table with columns for 'Date', 'From', and 'Subject'. The first row is '12/15/2004 Mary Tyler' with subject 'Moving date'.

3. Click the *Things to Do* link in the menu bar.

4. Click the *Add New To Do* link.

The screenshot shows the 'Summary' page for property '10922 ELENA ST'. It includes a 'Summary' menu bar with 'Things To Do' circled in red. Below the property address and details, there are sections for 'Documents Available to View' and 'Documents Pending Upload'. The 'Documents Available to View' section has a table with columns: Name, Type, Comment, Upload Date, Rev, and Public. The 'Documents Pending Upload' section has a table with columns: Name, Type, Comment, Due Date, and Associated To Do.

The screenshot shows the 'Things To Do' list for property '10922 ELENA ST'. It includes a 'Printable Version' link and an 'Add New To Do' link circled in red. Below is a table with columns: Status, To Do Item, Dependent Upon, Category, Comments, Due Date, Completed Date, and Details. The first row is 'Add Seller's Agent' with due date '9/10/2004' and completed date '12/3/2004'. The last row is 'Just Listed Marketing to Neighborhood' with due date '9/12/2004'.

5. Enter the description, select a *Type* and *Category* from the drop down lists and enter a *Due Date*. Select all the parties you would like to give access to see and/or complete the To-Do item by highlighting their name on the available roles section. Click *Add*; click *Save* when finished.

6. The new item will be added in the *Things To Do* section.

The screenshot shows the 'Add New To Do' form. It has a 'Description' field with a dropdown menu, a 'Type' dropdown menu, and a 'Category' dropdown menu. There are 'Due Dates' sections for 'Dependent upon Transaction Date', 'Dependent upon To Do', and 'Dependent upon Calendar Date'. There is a 'Security' section with 'Availability Rules' and 'Permissions List' tables. The 'Availability Rules' table has columns for Name, Priority, and Role. The 'Permissions List' table has columns for Name, Priority, and Role. There are 'Add' and 'Remove' buttons for each table. At the bottom, there are 'Cancel' and 'Save' buttons.

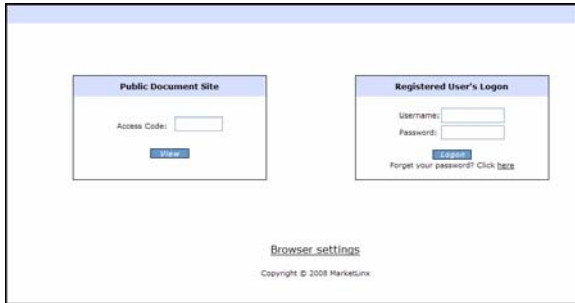
The screenshot shows the 'Things To Do' list for property '10922 ELENA ST'. It includes a 'Printable Version' link and an 'Add New To Do' link circled in red. Below is a table with columns: Status, To Do Item, Dependent Upon, Category, Comments, Due Date, Completed Date, and Details. The first row is 'Contingency Removal for Seller's New Home Purchase' with due date '1/28/2006' and completed date '3/2/2006'. The last row is 'Add Seller's Agent' with due date '1/25/2006'.



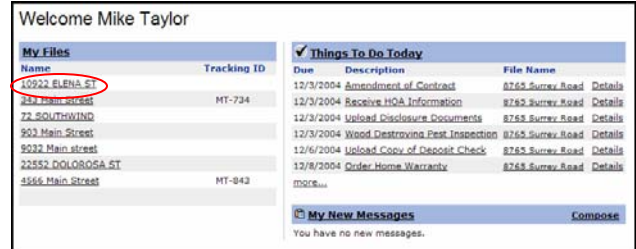
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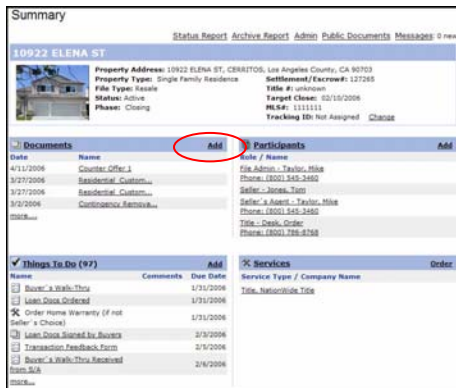
1. Go to the logon page and enter your user name and password then click **Logon**.



2. Click on the property file where the To Do item will be added.



3. Click the **Add** link next to the Things to Do box.



4. Enter the description, select a **Type** and **Category** from the drop down lists and enter a **Due Date**. Select all the parties you would like to give access to see and/or complete the To-Do item by highlighting their name on the available roles section. Click **Add**, click **Save** when finished.



5. The new item will be added in the **Things To Do** section.

