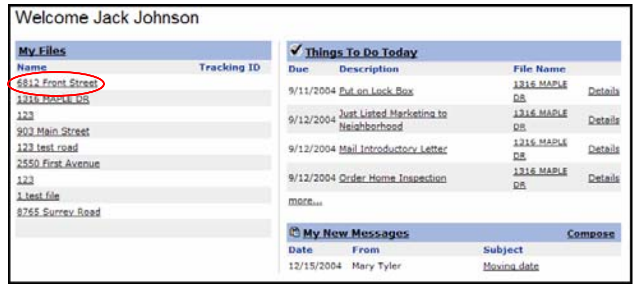
Adding a To Do List Item (From the File Summary Page)

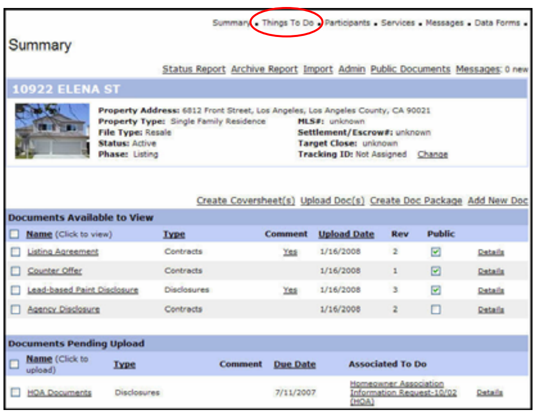
Quick Reference Guide

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



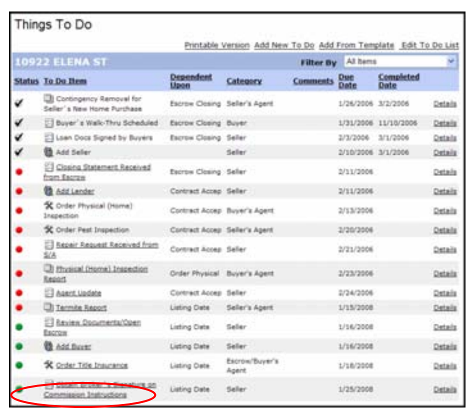
3. Click the *Things to Do* link in the menu bar.



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

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.



To contact First American please call 866-882-4353.

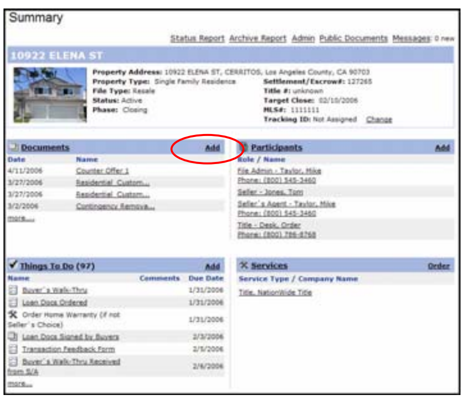
Adding a To Do List Item

Quick Reference Guide

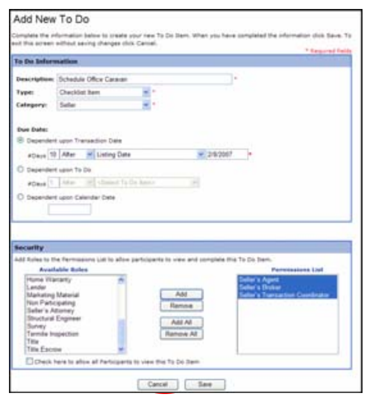
1. Go to the logon page and enter your user name and password then click *Logon.*

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.