

Creating a User Defined Document

Quick Reference Guide

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

The screenshot shows a web interface with two main sections: 'Public Document Site' and 'Registered User's Logon'. The 'Public Document Site' section has an 'Access Code:' field and a 'View' button. The 'Registered User's Logon' section has 'Username:' and 'Password:' fields, a 'Logon' button, and a link for 'Forgot your password? Click here'. At the bottom, there is a 'Browser settings' link and a copyright notice for MarketLinx.

2. From the **Home** page click on the subject property.

The screenshot shows a 'Welcome Mike Taylor' message at the top. Below it is a 'My Files' table with columns for 'Name', 'Tracking ID', and 'File Name'. The first row is highlighted with a red circle and contains the text '10922 ELENA ST'. To the right of the 'My Files' table is a 'Things To Do Today' section with a table of tasks, including 'Amendment of Contract' and 'Receive HOA Information'. At the bottom, there is a 'My New Messages' section with a 'Compose' button.

3. To Add a Document, click on the **"Add"** link in the **Documents** section.

The screenshot shows the 'Summary' page for property '10922 ELENA ST'. The 'Documents' section is visible, with an 'Add' link circled in red. The 'Documents' table lists various documents with columns for 'Date', 'Name', and 'Role / Name'. Other sections include 'Participants', 'Things To Do (97)', and 'Services'.

4. Select **User Defined** from the Document Name drop-down window. You will be taken to the **Document Settings** area to set permissions.

The screenshot shows the 'Add a Document' page. The 'Name:' field has a dropdown menu open, showing a list of document types. 'User Defined' is selected and highlighted in blue. Other options include 'Agency Disclosure', 'Appraisal', 'Buyer's Disclosure Statement', etc. 'Cancel' and 'Next' buttons are visible at the bottom right.

5. Enter the document name, select a document type from the drop down list and set View, Upload, and Own document permissions. Finally, select any applicable document options and click **Save Changes**.

The screenshot shows the 'Document Settings' page. The 'Document Security' section is prominent, featuring a table with columns for 'Role', 'View', 'Upload', and 'Document Owner'. The table lists various roles like 'Appraisal', 'Buyer', 'Buyer's Agent', etc., and checkboxes for permissions. At the bottom, there are 'Cancel' and 'Save Changes' buttons, with 'Save Changes' circled in red.

6. You can now Upload your document, create a fax coversheet or create a Document placeholder to upload or fax the document at a later time.

The screenshot shows the 'Add a Document' page. The 'Name:' field is set to 'Listing Addendum'. The 'Upload now' option is selected. Below it, there is a 'File:' field with a 'Browse...' button and a 'Comment:' field. At the bottom, there are 'Cancel' and 'Next' buttons.

