



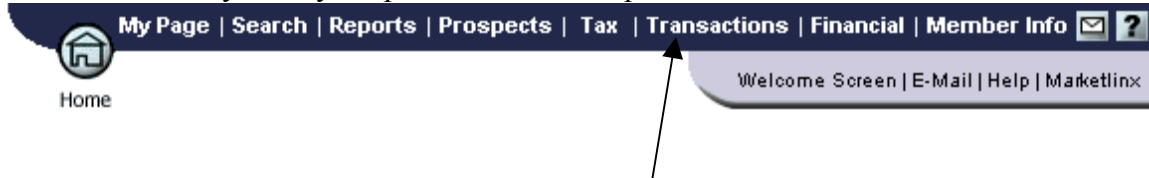
Presenting

Transaction management

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Use a different fax cover page for each document!

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dak@online2k.net

Transaction Management is to be used from listing to contract to closing. It is your “to do” list and how you may keep in touch with all parties to the transaction.



Use the black menu to successfully get to transactions. You will cross a secure page to get into the feature.

You may access the settings and the To Do lists from the top menu.

User Settings

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

My Settings

Personal Information	Edit personal information such as your phone numbers or e-mail address.
Change Password	Change your NREIS Transactions password.
Notifications	Select how you will be notified when you are added to a new file, when file changes are made, or when services are ordered.
Display Settings	Select the number of file-related items to display on your Home and File Summary pages.
Favorite Service Providers	Displays a list of your favorite service providers, including their contact information.
External Accounts	Specify the External System(s) of which you are a member. File information can be autopopulated directly from property listings.
To Do Templates	Customize the To Do Lists that you will use to manage your files.
Personal Service Providers	Manage the list of Service Providers you use who are not formal participants in the NREIS Transactions system (Personal Service Providers).
Share File Access	Allow another person in your office to access and manage your files.
Profile Page Contents	Supply text, upload your photo, and view your personal NREIS Transactions Profile Page.

My Reports

File Activity	Generate time-frame specific reports of files in which you have participated.
Service Orders	Run reports on service orders that you have either placed or received.

Additional Functions

Office Administration

Here is where you will find the to do lists which you may edit.

User To Do Template Maintenance



[New Template](#)

Select	To do Template Name <i>(Click to edit)</i>
<input type="checkbox"/>	<u>\$ Change to do list</u>
<input type="checkbox"/>	<u>Buyer Pending to do</u>
<input type="checkbox"/>	<u>Contract Pending Personal</u>
<input type="checkbox"/>	<u>Hud Pending to do</u>
<input type="checkbox"/>	<u>Personal Contract Pending to do</u>
<input type="checkbox"/>	<u>Personal Pre-Sale</u>

Template Editor: \$ Change to do list

[Add New To Do Item](#)

[Assign to Counties](#)

[Assign to Roles](#)

[Assign to Deal Types](#)

[Assign to Phase](#)

Sort by Due Date Rule

Description	Due
<input type="checkbox"/> Amendment to Listing	0 days before Listing Date
<input type="checkbox"/> Copy to Office Admin	0 days before Listing Date
<input type="checkbox"/> MLS Print Out	0 days before Listing Date
<input type="checkbox"/> Update Contact Manager	0 days before Listing Date
<input type="checkbox"/> Update Listing Board	0 days before Listing Date
<input type="checkbox"/> Update Marketing Material	0 days before Listing Date
<input type="checkbox"/> Update MLS	0 days before Listing Date
<input type="checkbox"/> Update PDA	0 days before Listing Date
<input type="checkbox"/> Update Websites	0 days before Listing Date
<input type="checkbox"/> Contact Previous Showing Agents	30 days after Listing Date

Select All

Clear All

Delete Selected

Cancel

Close
















Price Change

Template Editor: Buyer Pending to do

[Add New To Do Item](#)
[Assign to Counties](#)
[Assign to Roles](#)
[Assign to Deal Types](#)
[Assign to Phase](#)

Sort by **Due Date Rule** ▼









Description	Due
<input type="checkbox"/> <input checked="" type="checkbox"/> Confirm Buyer`s Insurance With Title Company	15 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Closing Instructions to Buyer	14 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Set Closing Time	14 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Utility Transfer	14 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> New Survey Order	10 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Confirm Repairs Completed	7 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Confirm Commission Disbursement	3 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Confirm Lenders Closing Papers At Title	3 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Confirm Walkthru / Reinspection With Buyer / Seller	3 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Give Buyer Total From HUD for Cashiers Check	3 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Prepare Client Appreciation Materials	3 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Review HUD Final Numbers	3 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Acquire Buyer Updated Information	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> Add Buyer	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> Add Listing Agent	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> Add Selling Agent	0 days before Effective Date of Contract

<input type="checkbox"/>  <u>Add Buyer</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Add Listing Agent</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Add Selling Agent</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Add Selling Personal Assistant</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Delivery Of Executed Contract</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Delivery of Seller Disclosure Reports</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Input into Contact Management Program</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Option Money Received, Copy in File</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Option Money to Listing Agent W/Copy of Contract</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Order Closing Gift</u>	0 days before Closing Date Target
<input type="checkbox"/>  <u>Receive Key After Closing / Funding</u>	0 days before Closing Date Target
<input type="checkbox"/>  <u>Receive Security System Information</u>	0 days before Closing Date Target
<input type="checkbox"/>  <u>Remind Buyer to Secure Insurance</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Remove From Board</u>	0 days before Closing Date Target
<input type="checkbox"/>  <u>Seller / Buyer Temporary Lease</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Update Agent Calendar</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Update Contact Management</u>	0 days before Closing Date Target
<input type="checkbox"/>  <u>Write on Pending Board</u>	0 days before Effective Date of Contract
<input type="checkbox"/>  <u>Additional Earnest Money</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Amendment of Contract</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Close File</u>	2 days after Closing Date Target
<input type="checkbox"/>  <u>Confirm Inspections Time with Buyer</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Confirm Inspections with Listing Agent</u>	2 days after Effective Date of Contract

<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Inspections with Listing Agent</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Contract and Earnest Money To Title, Receipted Page in File</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Copies of Contract to Office Admin</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Ammendment to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Get CBS Code</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Lender Contact Information to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Order Termite Inspection</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Received Inspection Report</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Termite Certificate to Lender & Title</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Survey From Seller</u>	5 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Buyer</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Mortgage</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Title</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Last Day Of Option Period</u>	7 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Appraisal Has Been Ordered</u>	10 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Amendment of Contract for Lender Repairs</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Appraisal Complete</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Appraiser Reinspection</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Loan Approval</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Amendment to Title / Lender</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Lender Required Repairs</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Objections to Title / Survey</u>	20 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Title Commitment Received</u>	20 days after Effective Date of Contract

<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Inspections with Listing Agent</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Contract and Earnest Money To Title, Receipted Page in File</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Copies of Contract to Office Admin</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Ammendment to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Get CBS Code</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Lender Contact Information to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Order Termite Inspection</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Received Inspection Report</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Termite Certificate to Lender & Title</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Survey From Seller</u>	5 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Buyer</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Mortgage</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Title</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Last Day Of Option Period</u>	7 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Appraisal Has Been Ordered</u>	10 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Amendment of Contract for Lender Repairs</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Appraisal Complete</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Appraiser Reinspection</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Loan Approval</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Amendment to Title / Lender</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Lender Required Repairs</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Objections to Title / Survey</u>	20 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Title Commitment Received</u>	20 days after Effective Date of Contract

<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Add Selling Personal Assistant</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Delivery Of Executed Contract</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Delivery of Seller Disclosure Reports</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Input into Contact Management Program</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Option Money Received, Copy in File</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Option Money to Listing Agent W/Copy of Contract</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Order Closing Gift</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Receive Key After Closing / Funding</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Receive Security System Information</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Remind Buyer to Secure Insurance</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Remove From Board</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Seller / Buyer Temporary Lease</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Update Agent Calendar</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Update Contact Management</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Write on Pending Board</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Additional Earnest Money</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Amendment of Contract</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Close File</u>	2 days after Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Inspections Time with Buyer</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Inspections with Listing Agent</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Contract and Earnest Money To Title, Receipted Page in File</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Copies of Contract to Office Admin</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Contract and Earnest Money To Title, Receipted Page in File</u>	2 days after Effective Date of Contract

<input type="checkbox"/>  <u>Deliver Ammdement to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Get CBS Code</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Lender Contact Information to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Order Termite Inspection</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Received Inspection Report</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Termite Certificate to Lender & Title</u>	2 days after Effective Date of Contract
<input type="checkbox"/>  <u>Survey From Seller</u>	5 days after Effective Date of Contract
<input type="checkbox"/>  <u>Deliver Survey To Buyer</u>	6 days after Effective Date of Contract
<input type="checkbox"/>  <u>Deliver Survey To Mortgage</u>	6 days after Effective Date of Contract
<input type="checkbox"/>  <u>Deliver Survey To Title</u>	6 days after Effective Date of Contract
<input type="checkbox"/>  <u>Last Day Of Option Period</u>	7 days after Effective Date of Contract
<input type="checkbox"/>  <u>Confirm Appraisal Has Been Ordered</u>	10 days after Effective Date of Contract
<input type="checkbox"/>  <u>Amendment of Contract for Lender Repairs</u>	15 days after Effective Date of Contract
<input type="checkbox"/>  <u>Appraisal Complete</u>	15 days after Effective Date of Contract
<input type="checkbox"/>  <u>Appraiser Reinspection</u>	15 days after Effective Date of Contract
<input type="checkbox"/>  <u>Confirm Loan Approval</u>	15 days after Effective Date of Contract
<input type="checkbox"/>  <u>Deliver Amendment to Title / Lender</u>	15 days after Effective Date of Contract
<input type="checkbox"/>  <u>Lender Required Repairs</u>	15 days after Effective Date of Contract
<input type="checkbox"/>  <u>Objections to Title / Survey</u>	20 days after Effective Date of Contract
<input type="checkbox"/>  <u>Title Commitment Received</u>	20 days after Effective Date of Contract

Select All Clear All Delete Selected

Cancel Close

Template Editor: Personal Pre-Sale

[Add New To Do Item](#)

[Assign to Counties](#)

































[Assign to Roles](#)

[Assign to Deal Types](#)

[Assign to Phase](#)

Sort by Due Date Rule








Description	Due
<input type="checkbox"/>  Additional Websites (Pictures & Text)	0 days before Listing Date
<input type="checkbox"/>  Agency Disclosure Form	0 days before Listing Date
<input type="checkbox"/>  Company Website (Pictures & Text)	0 days before Listing Date
<input type="checkbox"/>  Copies To Office Admin	0 days before Listing Date
<input type="checkbox"/>  Corporate Franchise (Pictures & Text)	0 days before Listing Date
<input type="checkbox"/>  Deliver Marketing Packet to Property	0 days before Listing Date
<input type="checkbox"/>  Duplicate Key	0 days before Listing Date
<input type="checkbox"/>  Email to Agents	0 days before Listing Date
<input type="checkbox"/>  Environmental Form	0 days before Listing Date
<input type="checkbox"/>  Exclusion Clause	0 days before Listing Date
<input type="checkbox"/>  Get Key	0 days before Listing Date
<input type="checkbox"/>  HOA Documents	0 days before Listing Date
<input type="checkbox"/>  Input into Contact Manager	0 days before Listing Date
<input type="checkbox"/>  Just Listed Marketing to Neighborhood	0 days before Listing Date
<input type="checkbox"/>  Just Listed Marketing to Office	0 days before Listing Date
<input type="checkbox"/>  Lead Base Paint Disclosure	0 days before Listing Date

<input type="checkbox"/>  Listing Agreement Form	0 days before Listing Date
<input type="checkbox"/>  Listing Checklist	0 days before Listing Date
<input type="checkbox"/>  Mail Letter 1	0 days before Listing Date
<input type="checkbox"/>  Mail Letter 2	0 days before Listing Date
<input type="checkbox"/>  Mail Letter 3	0 days before Listing Date
<input type="checkbox"/>  Measure House	0 days before Listing Date
<input type="checkbox"/>  MLS Input	0 days before Listing Date
<input type="checkbox"/>  MLS Input Form	0 days before Listing Date
<input type="checkbox"/>  MLS Print Out	0 days before Listing Date
<input type="checkbox"/>  MLS Tour Confirmed with Homeowner	0 days before Listing Date
<input type="checkbox"/>  MLS Tour Schedule	0 days before Listing Date
<input type="checkbox"/>  Mortgage Information Letter	0 days before Listing Date
<input type="checkbox"/>  NTREIS Listing (Pictures & Disclosure)	0 days before Listing Date
<input type="checkbox"/>  Open House Confirmed with Homeowner	0 days before Listing Date
<input type="checkbox"/>  Open House Ordered	0 days before Listing Date
<input type="checkbox"/>  Order Marketing 1	0 days before Listing Date
<input type="checkbox"/>  Order Marketing 2	0 days before Listing Date
<input type="checkbox"/>  Order Marketing 3	0 days before Listing Date
<input type="checkbox"/>  Pool Addendum	0 days before Listing Date
<input type="checkbox"/>  Radon Form	0 days before Listing Date
<input type="checkbox"/>  Referral Agreement Form	0 days before Listing Date
<input type="checkbox"/>  Seller Disclosure	0 days before Listing Date
<input type="checkbox"/>  Share Showing Instructions and Keybox Info with Showing Service	0 days before Listing Date
<input type="checkbox"/>  Showing Instructions	0 days before Listing Date
<input type="checkbox"/>  Sign on Property	0 days before Listing Date
<input type="checkbox"/>  Sign Ordered	0 days before Listing Date
<input type="checkbox"/>  Take Photos	0 days before Listing Date
<input type="checkbox"/>  Transfer of Keybox Form	0 days before Listing Date
<input type="checkbox"/>  Update Calendar / PDA	0 days before Listing Date
<input type="checkbox"/>  Virtual Tour Confirmed with Homeowner	0 days before Listing Date
<input type="checkbox"/>  Virtual Tour Scheduled	0 days before Listing Date
<input type="checkbox"/>  Write on Listing Board	0 days before Listing Date

Template Editor: Hud Pending to do

[Add New To Do Item](#)
[Assign to Counties](#)
[Assign to Roles](#)
[Assign to Deal Types](#)
[Assign to Phase](#)

Sort by Due Date Rule ▼

Description	Due
<input type="checkbox"/>  Confirm Buyer`s Insurance With Title Company	15 days before Closing Date Target
<input type="checkbox"/>  Closing Instructions to Buyer	14 days before Closing Date Target
<input type="checkbox"/>  Set Closing Time	14 days before Closing Date Target
<input type="checkbox"/>  Utility Transfer	14 days before Closing Date Target
<input type="checkbox"/>  New Survey Order	10 days before Closing Date Target
<input type="checkbox"/>  Confirm Repairs Completed	7 days before Closing Date Target
<input type="checkbox"/>  Confirm Commission Disbursement	3 days before Closing Date Target
<input type="checkbox"/>  Confirm Lenders Closing Papers At Title	3 days before Closing Date Target
<input type="checkbox"/>  Confirm Walkthru / Reinspection With Buyer / Seller	3 days before Closing Date Target
<input type="checkbox"/>  Give Buyer Total From HUD for Cashiers Check	3 days before Closing Date Target
<input type="checkbox"/>  Prepare Client Appreciation Materials	3 days before Closing Date Target
<input type="checkbox"/>  Review HUD Final Numbers	3 days before Closing Date Target
<input type="checkbox"/>  Acquire Buyer Updated Information	0 days before Closing Date Target
<input type="checkbox"/>  Add Buyer	0 days before Effective Date of Contract
<input type="checkbox"/>  Add Selling Agent	0 days before Effective Date of Contract
<input type="checkbox"/>  Add Selling Personal Assistant	0 days before Effective Date of Contract

<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Delivery Of Executed Contract</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Input into Contact Management Program</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Order Closing Gift</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Remind Buyer to Secure Insurance</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Update Agent Calendar</u>	0 days before Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Update Contact Management</u>	0 days before Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Additional Earnest Money</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Close File</u>	2 days after Closing Date Target
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Inspections Time with Buyer</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Contract and Earnest Money To Title, Receipted Page in File</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Copies of Contract to Office Admin</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Lender Contact Information to Title Company</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Order Termite Inspection</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Received Inspection Report</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Termite Certificate to Lender & Title</u>	2 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Buyer</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Deliver Survey To Mortgage</u>	6 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Appraisal Has Been Ordered</u>	10 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Confirm Loan Approval</u>	15 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Objections to Title / Survey</u>	20 days after Effective Date of Contract
<input type="checkbox"/> <input checked="" type="checkbox"/> <u>Title Commitment Received</u>	20 days after Effective Date of Contract
<input type="button" value="Select All"/> <input type="button" value="Clear All"/> <input type="button" value="Delete Selected"/>	

Notes:

Use this link for how to in TM: <http://www.ntreis.net/Viewlets/transactionsviewlets.htm>