

Office Administration- Office File Manager

Brokers and Office Administrators learn how to search for files via the File Manager function

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

Public Document Site

Registered User's Logon

Access Code:

Logon

Username:

Password:

Logon

Forgot your password? Click here

Browser settings

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2. From the **My Files** screen in Doc Manager click on the **Office Files** or **Office Document Files** link (name of the link may vary depending on your system)

My Files

Create a New File • Close Files • To Do List

Search

To search for a file, enter some information about the file, such as the file name, MLS# number, address or a participant name in the field below. To see all of the files, leave the Search field empty and click the Search button.

Search Criteria: Filter By: Active Search

Name	Address	File Rules	Status	Phase	MLS#	Date Created	# of Documents
<u>1234 Main Street, Listing</u>	1234 Main Street	File Admin Listing Agent	Active	Listing		12/7/2008	6
<u>1234 Weather Ave</u>	1234 Weather Ave	Buyer's Agent File Admin	Active	Listing		1/8/2009	6
<u>1428 Market Street</u>	1428 Market Street	File Admin Listing Agent	Active	Listing	809348734	11/12/2008	11
<u>26114 BORG RD</u>	26114 BORG RD	File Admin Seller's Agent	Active	Change	06-149079	6/23/2008	18
<u>30433 PENROD DR</u>	30433 PENROD DR	File Admin Listing Agent	Active	Listing	08-250777	7/11/2008	10

3. You can choose the office you want to search if you have more than one or leave the default set to **All Offices**. You can pick a specific user to search for in the **User** drop down list and select a file **Status**. Finally, you can enter additional search criteria such as **File Name**, **MLS number**, etc. or leave it blank to display all files for the above criteria. Click **Search**.

File Manager

Search for a file

Enter the appropriate criteria and click Search. Hover over the File Name to view editing options or hover over each Participant name to view details for that Participant. Selecting a specific Office will limit the search to Files that have at least one Participant from the Office. Selecting a specific user will further limit the search to Files where the selected user is a Participant.

Cobrand: MLS Demo

Office: -- All Offices -- Office Users: -- All Office Users --

Status: Active Files

Where: File Name contains Search

4. The results will display. If you want to sort your results, click on any of the underlined headers. If you hover over any of the names on the right side of the screen you will see the user's office and their role in the file.

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Cobrand: MLS Demo

Office: -- All Offices -- Office Users: -- All Office Users --

Status: Active Files

Where: File Name contains Search

Results: 1 to 10 of 152 Page: 1 2 3 4 5 6 7 8 9 10 11 12 next

Name	Address	Status	Phase	MLS#	Date Created	Participants
<u>11 Downing Street Y</u>	11 Downing Street Los Angeles, CA	Active	Listing		3/18/2008	John House Y Suzanne Shea Y
<u>1155 Loran St. Y</u>	1155 Loran St. Austin, CA	Active	Listing	98765	2/23/2009	Audrey Davis Y James Coordinator Y James Kingston Y Joe Agent Y Susan Agent Y
<u>111 madrone Y</u>	111 madrone los angeles, CA	Active	Listing		10/31/2005	Lynnda Haranich Y

5. To edit a file, hover over the file name and you will see a list of options. Every participant in the file who belongs to your office(s) will display in the drop down list. You can choose to edit the file as any of those participants. Any changes you make to that file will be made on their behalf and your name will be displayed in the history and audit logs.

File Manager

Search for a file

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Note: When editing a file as a participant in your office you will inherit their permissions on the file and see all that they are able to see in the file including participants, documents, to do items, etc.