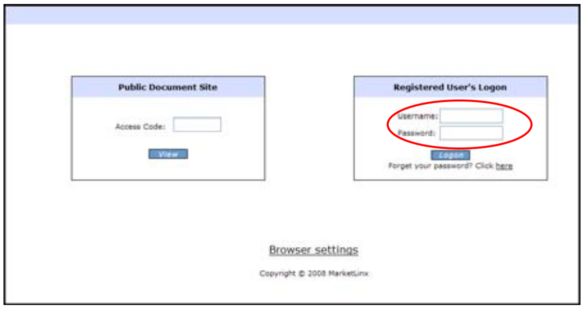
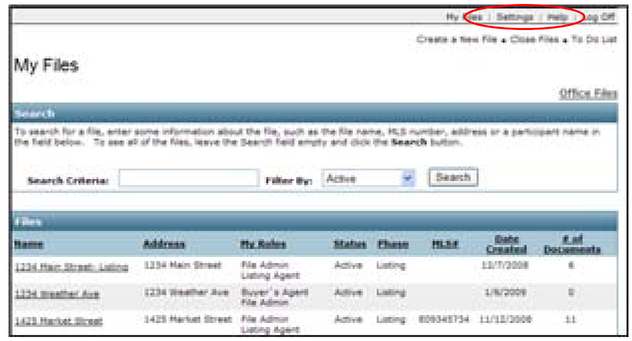
Office Administration- Transfer Files

Brokers and Office Administrators learn how to bulk transfer files from one member to another

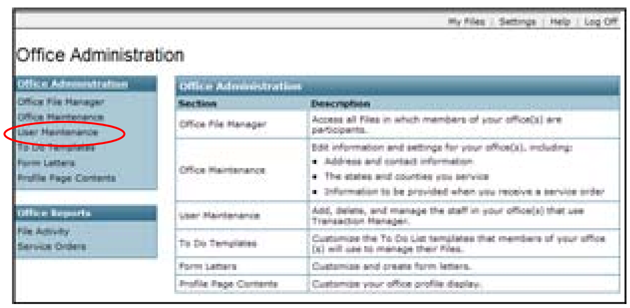
1. Go to the logon page in TM/DM and enter you user name and password then click *Logon*.



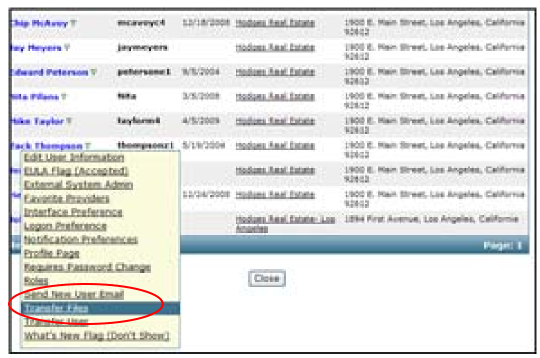
2. From the *My Files* screen in Doc Manager click on *Settings*



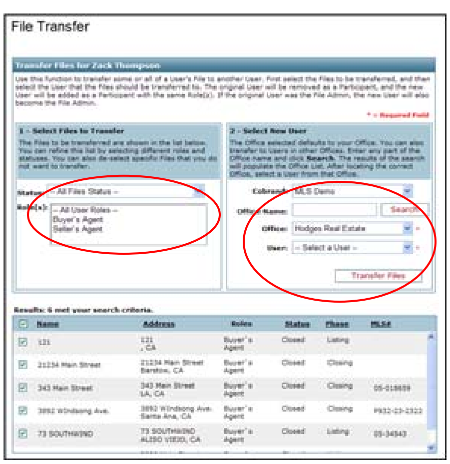
3. In your Settings screen click on *Office Administration* and then click on *User Maintenance*



4. All members of your office(s) will be listed. Find the user whose file(s) you want to transfer and hover over their name. Choose the *Transfer Files* option.



5. On the File Transfer page you can choose to transfer all files or choose files by status or the role of the participant. You can also choose specific files by clicking the checkbox next to each file name. Once you have selected which files to transfer, find the user you want to transfer to in the User dropdown list. Click *Transfer Files*.



Note: You can transfer files to users outside of your office(s) by entering the name of the office in the Office Name search box and finding the office they belong to. Once you have chosen the office, you will see a list of all the office's agents and you can select the appropriate agent.