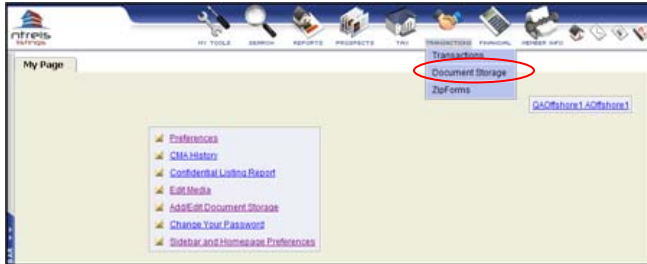


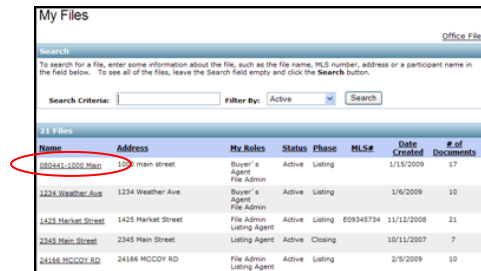
Adding To Do's From a Template

Learn how to add tasks (To Do items) to your file to help you work more efficiently

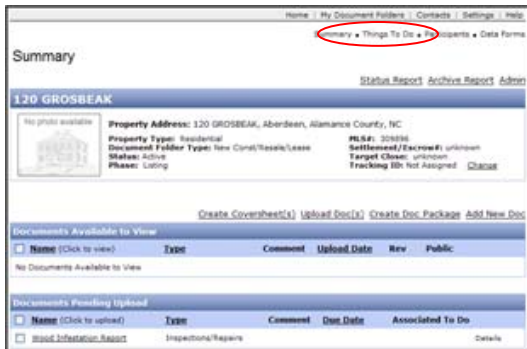
1. There are three ways to access your existing Document Storage folders. From the **Add/Edit** menu or My Tools menu select a listing and click the **Document Storage** link. Or click the **Transactions** icon on the menu bar and select Document Storage.



2. If you accessed it from **My Tools** or **Add/Edit** you will be taken directly to the document folder for the listing you selected. If you accessed **Document Storage** from the top menu bar in Tempo, you will see a list of document folders, choose the one you want to add a to do list to.



3. Once on the folder's **Summary** screen click the **Things To Do** link.



4. Click on the **Add From Template** link.



5. Select the Template you wish to use from the pull-down list and enter the required date(s), then click **Next**.



6. Review the list of To Do items. Check the pre-assigned due dates and modify if necessary. Click **Finish**. Your To Do list has been added!

