



STEPS TO TAKE WHEN AN AGENT LEAVES THEIR BROKER:

Step 1- For the agent:

Create a Document Package for each transaction to assure you will have the paperwork necessary for your records.

- Go to : <http://www.ntreis.net/technical/transactions.asp> click on Document Management Support and view our Quick Reference Guide for “Creating a Document Package”. Many agents create a document package and save either on a CD or their own computer at the close of each sale.

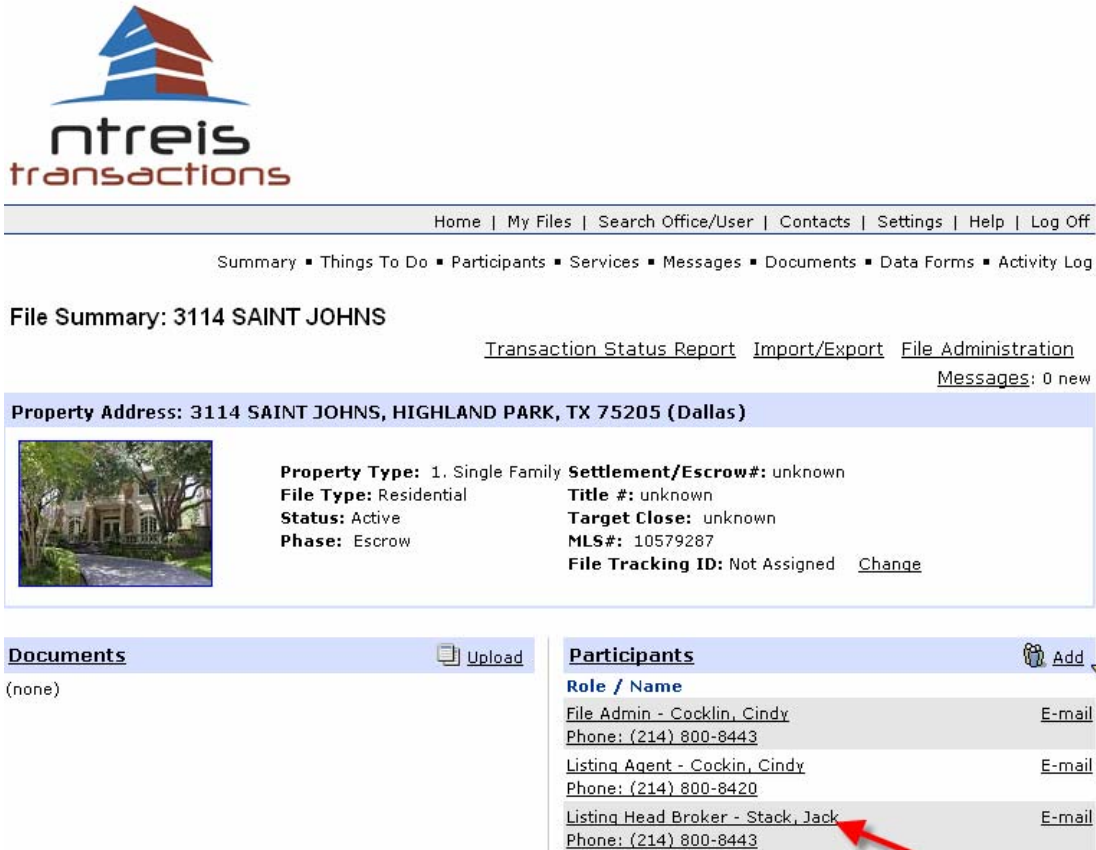
Step 2- For the agent and broker:

Transfer rights to open files to the existing office administrator or broker. This enables the office to close the open files.

- Be sure the office administrator and/or broker is added as a default participant at the creation of all files or is added as a participant first in order to transfer rights of a file. (to add a Default Participant go to: <http://www.ntreis.net/technical/transactions.asp> click on How to “Add a Default Participant”)
- Once the broker or office administrator is a participant in the file, the agent or creator of the file, may transfer rights

Step 3- To transfer rights of file:

1. Go to the File Summary Page and make sure your broker/administrator is a participant to the file. (if not, click on "Add" (yellow arrow) and add –see our Quick Reference Guide - [How to Add a Participant](http://www.ntreis.net/technical/transactions.asp) at <http://www.ntreis.net/technical/transactions.asp> -)



ntreis transactions


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

Summary | Things To Do | Participants | Services | Messages | Documents | Data Forms | Activity Log

File Summary: 3114 SAINT JOHNS

[Transaction Status Report](#) | [Import/Export](#) | [File Administration](#) | [Messages: 0 new](#)

Property Address: 3114 SAINT JOHNS, HIGHLAND PARK, TX 75205 (Dallas)

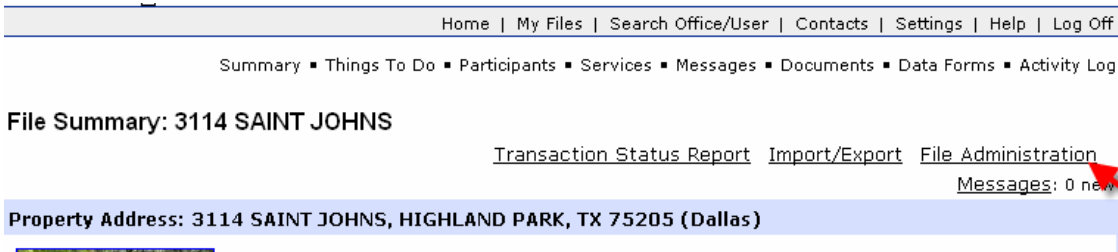
 **Property Type:** 1. Single Family **Settlement/Escrow#:** unknown
File Type: Residential **Title #:** unknown
Status: Active **Target Close:** unknown
Phase: Escrow **MLS#:** 10579287
File Tracking ID: Not Assigned [Change](#)

Documents [Upload](#) (none)

Participants [Add](#)

Role / Name	E-mail
File Admin - Cocklin, Cindy Phone: (214) 800-8443	E-mail
Listing Agent - Cocklin, Cindy Phone: (214) 800-8420	E-mail
Listing Head Broker - Stack, Jack Phone: (214) 800-8443	E-mail

2. Click on File Administration to be able to transfer rights:



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3. Click on “Transfer Admin” (Note you may also desire to generate an audit trail for your records – click “File History”)

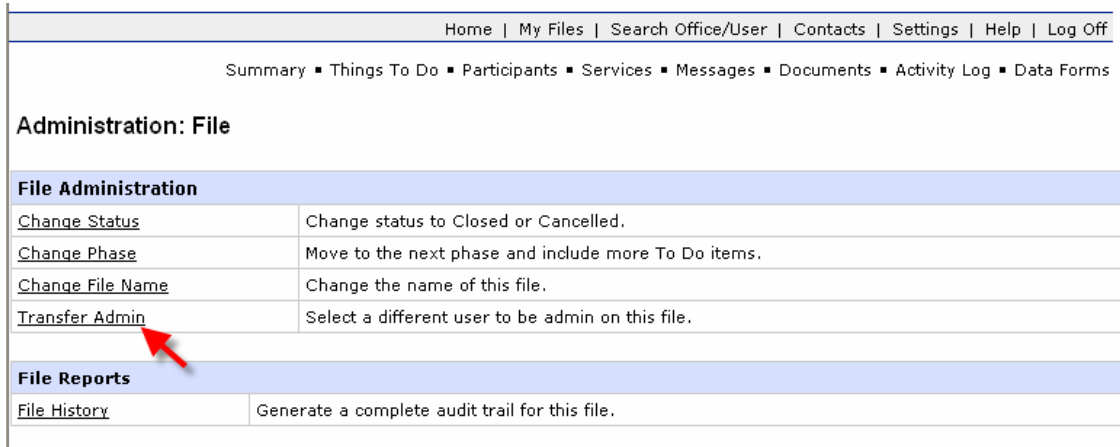
Home | My Files | Search Office/User | Contacts | Settings | Help | Log Off

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Administration: File

File Administration	
Change Status	Change status to Closed or Cancelled.
Change Phase	Move to the next phase and include more To Do items.
Change File Name	Change the name of this file.
Transfer Admin	Select a different user to be admin on this file.

File Reports	
File History	Generate a complete audit trail for this file.



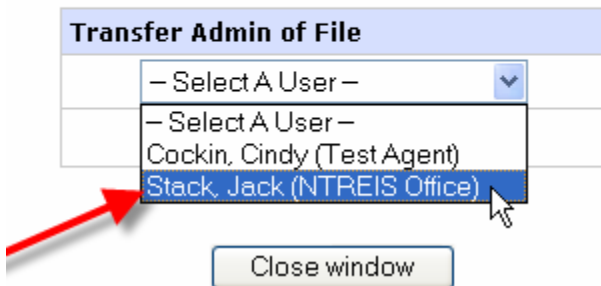
4. Click on the pull down member and choose your participant and “Transfer”

Use this screen to Transfer the Administrator Rights to a different user

Transfer Admin of File

<input type="text" value="- Select A User -"/>
<input type="text" value="- Select A User -"/> Cockin, Cindy (Test Agent) Stack, Jack (NTREIS Office)

Close window



Transfer and Close window. You're done!

Use this screen to Transfer the Administrator Rights to a different user

Transfer Admin of File

Stack, Jack (NTREIS Office) ▼

Transfer

Close window

