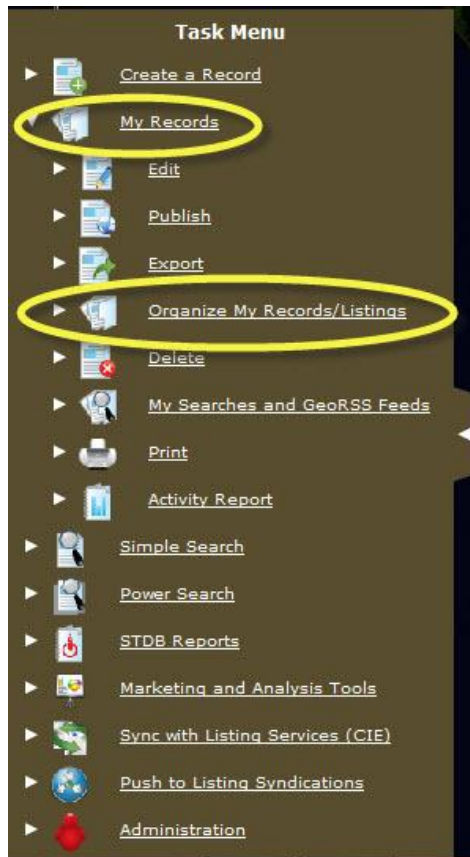


Organize My Records/Listings Tutorial

Organizing records/listings makes the properties quickly accessible to the user. The Organize My Records/Listings feature allows users to organize records and listings into one or more folders.

The step-by-step instructions below take you through the process of using the various functions within Organize My Records/Listings.

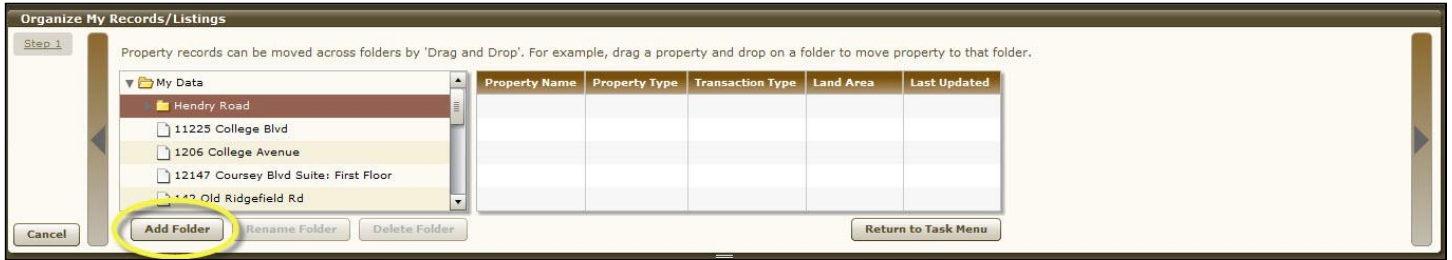
Step 1: Click 'My Records' located on the Task Menu. Select 'Organize My Records/Listings'.



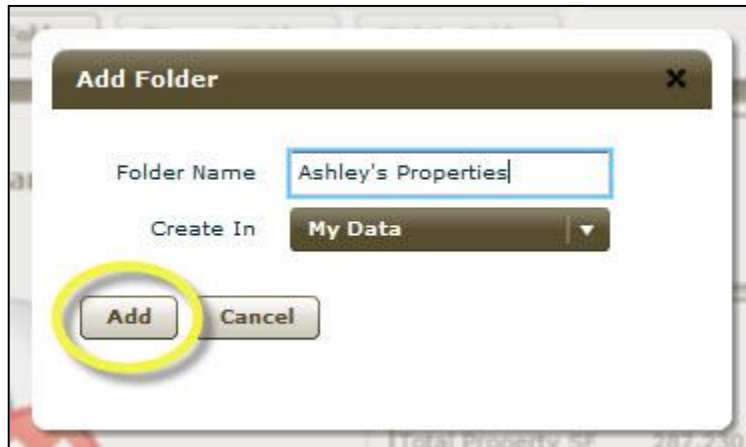
The 'Organize My Records/Listings' workflow will open at the top of the screen.



Step 1 (A): Click the 'Add Folder' button to create a new folder.



The user is now prompted to name the folder and select a subfolder to place the new folder in (if the user has multiple folders). To create the folder, click the 'Add' button.



The user will have successfully created a new folder. The new folder will be located in the list on the left.



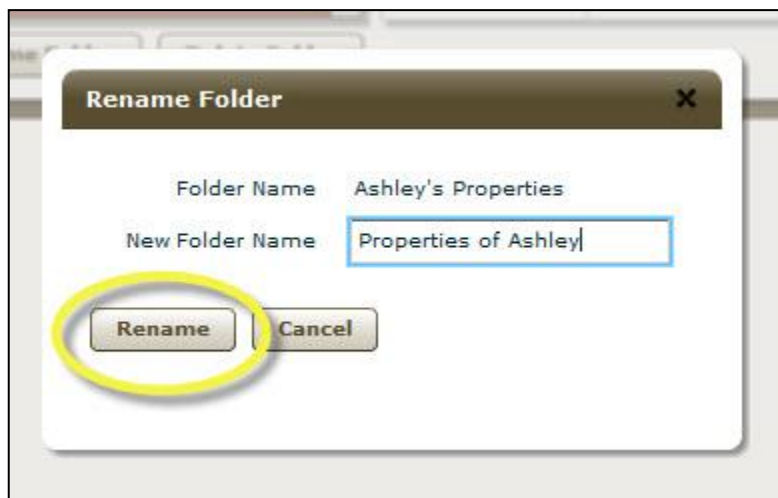
Step 1 (B): Property records can be moved into folders by dragging and dropping. For example, drag a property and drop in the desired folder to move the selected property to that folder. The property will now appear in the desired folder.



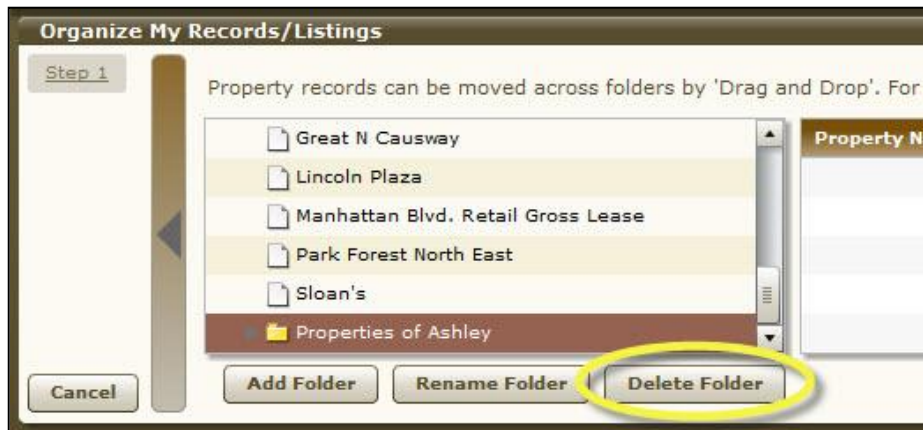
Step 1 (C): The user has the option to rename the folder by clicking the 'Rename Folder' button.



After entering the 'New Folder Name', the user must click the 'Rename' button to apply the changes made. The user will have successfully renamed the folder.



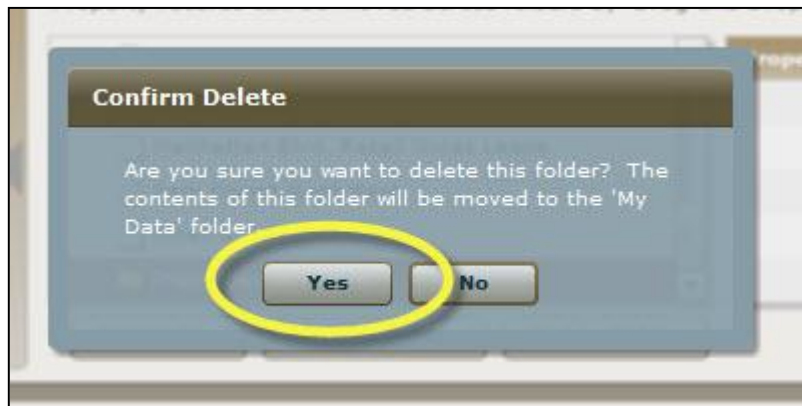
Step 1 (D): To delete a folder, click the 'Delete Folder' button.



Note: The "Confirm Delete" box will open and ask the user of the following: "Are you sure you want to delete the folder?" The contents of this folder will be moved to the 'My Data' Folder.

Click the 'Yes' button to permanently delete the folder.

Note: The user will have successfully deleted the folder only. The records/listings contained in the deleted folder will be moved back to the 'My Data' folder and will not be deleted.



To view the full record of the selected record, click the 'Preview Full Record' button. The user can select any of the buckets from the carousel below to view specific details, or click the 'Preview Summary Record' button to return to the summary record.

When the desired records/listings are organized, the user may now click the 'Return to Task Menu' button and be taken back to the CCIMREDEX home screen.

