

Creating Templates





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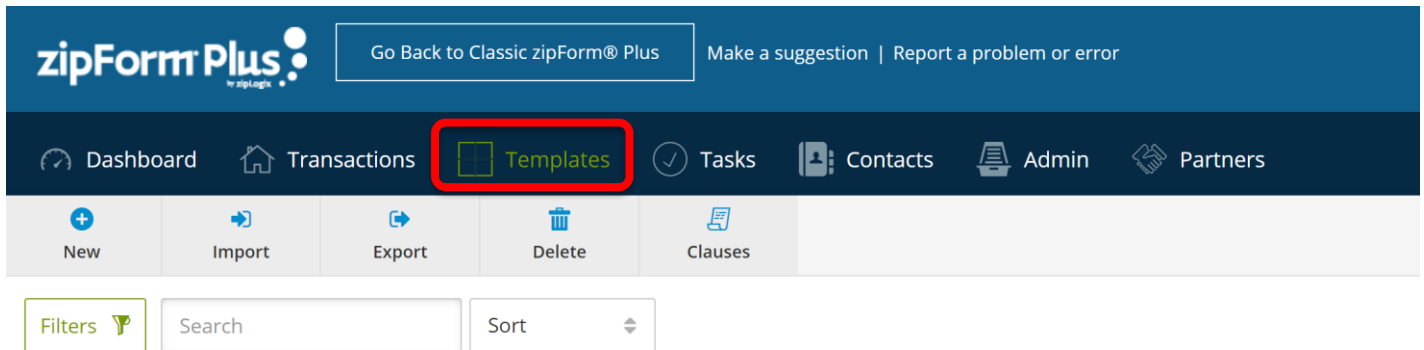
Agents/Admins can save time by creating shortcuts for repetitive tasks by using **Templates**. Templates are files within zipForm® Plus that allow you to add forms, documents, folders, and even tasks/checklists to be performed every time for a specified transaction type. Forms added to templates can be pre-filled with information automatically.

zipLogix Help Desk (586) 840-0140

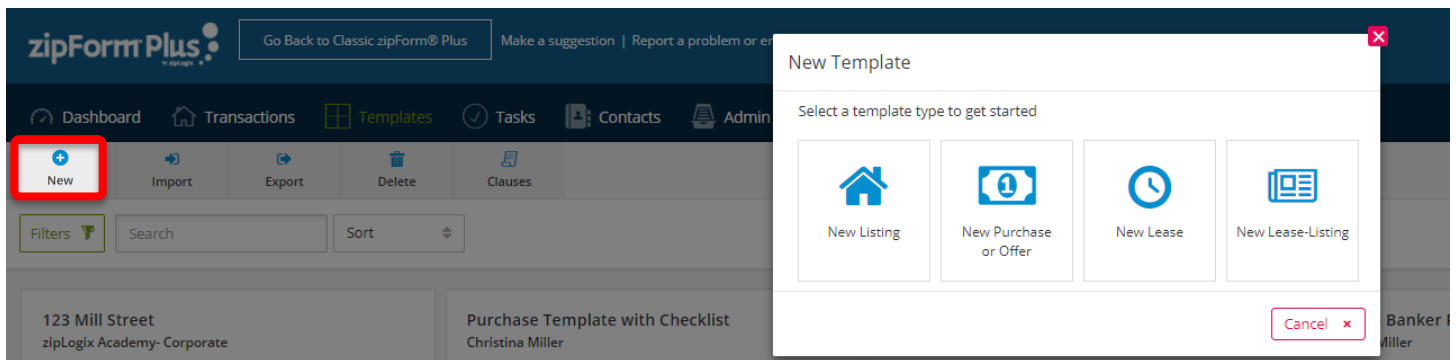
REV. 9/2017

How to Create Templates

1. Click **Templates** in the toolbar as seen below:



2. Click **New**. You can then choose which template type you would like to create.



3. Give your template a name. (**EX: BUYER** or **SELLER**). You will need to set up two different templates as there are different forms needed in each Template.
4. Enter **Property Type**, Choose **Agent** under **Scope** and then choose **Auto Apply**. Click **Save** to lock in all settings. (Only one can be selected per category)



Template Information

Name

HMS Buyer Template

Property Type

- Residential
 Industrial
 Multiunit
 Condominium
 Commercial
 Vacant Land
 Farm and Ranch
 Manufactured Home

Scope

- Agent
 Global
 Office

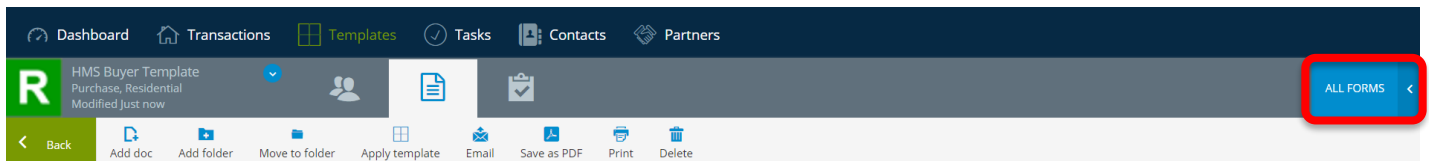
Auto Apply


- Do not automatically apply this template to new transactions
 Automatically apply this template to Purchase/Residential new transactions
 Automatically apply this template to all new transactions

Cancel ✕

Save ✓

5. Click on the **ALL FORMS** button on the upper right-hand side



6. If you have more than one forms library, click the  to locate the one you prefer. As you move through the list of your forms, you will notice if you hover over each one (without clicking) you will see the full description of that form. Select the forms by single clicking on each form you would like to add to your transaction.

Note: If you do not see the forms you need, please contact zipLogix™ Help Desk (586-840-0140) to be granted permission to access your necessary forms libraries.

FORMS ✕

A-Z ▾

ALL ▾

HMS National ▴ ▾

Acronym: HMS Version: 41.0

ALL

[FARR1] - Florida Association of REALTORS®

[HMS] - HMS National

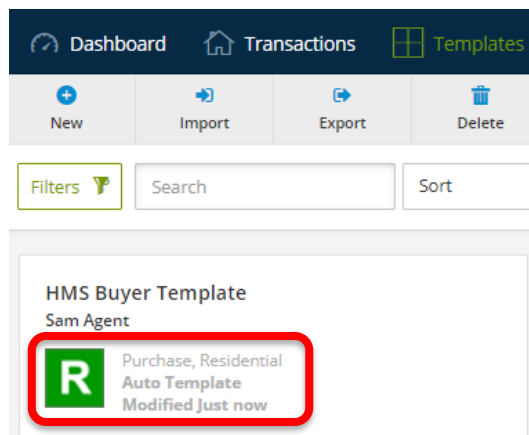
[ZIPDEMO] - ZipForm Demonstration Library

11/2/2017

[HMS Buyer Conversion Form 8/15](#)

Note: To see the complete name of the Forms, move your mouse over the name (do not click). As you hover over the name, you will see the full name of the form. When the forms are clicked, they will be added to your template.

- Click off the forms list section once you selected the forms to add to your Template.
- Click on your Templates button on your toolbar to reveal your new template. You will see that this template is set to **Auto Apply** to your newly created **Purchase, Residential** transaction.



Thank you for using zipForm® Plus!