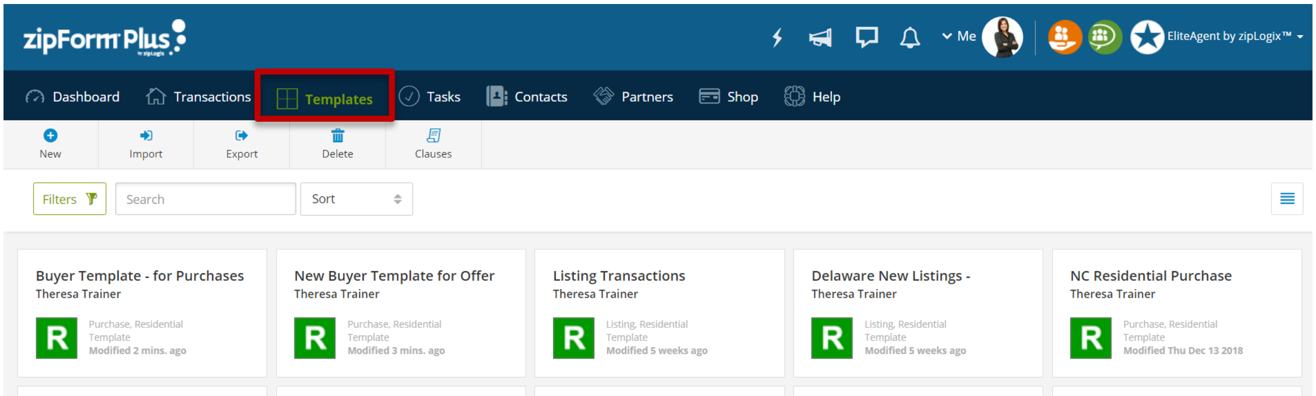
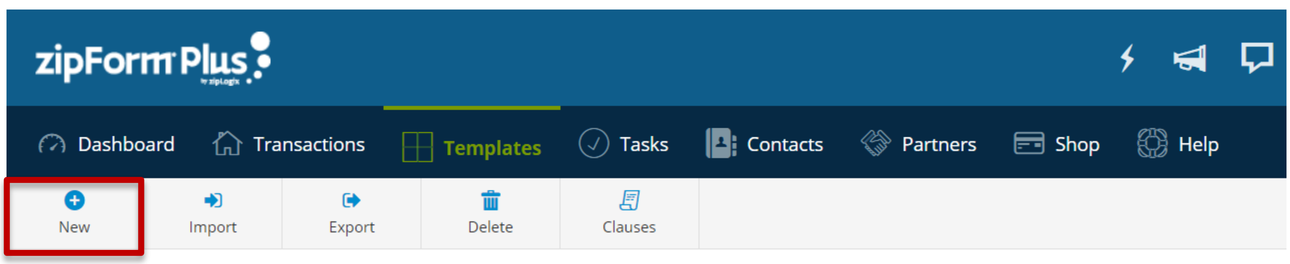
Managing Transactions (Template Creation) with zipTMS®

1. Once signed in to your zipForm® Plus account, navigate to "Templates," on your Navigation Bar.



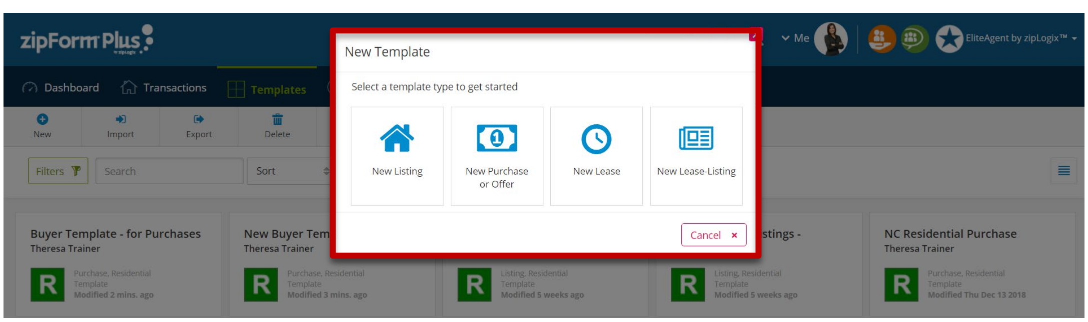
2. Here, create a Template: a time-saving packet of data that may contain forms, documents, checklists, and/or any other piece of information that may be re-purposed for multiple, similar transactions.

   To begin the new template creation process, click "New" on the toolbar.

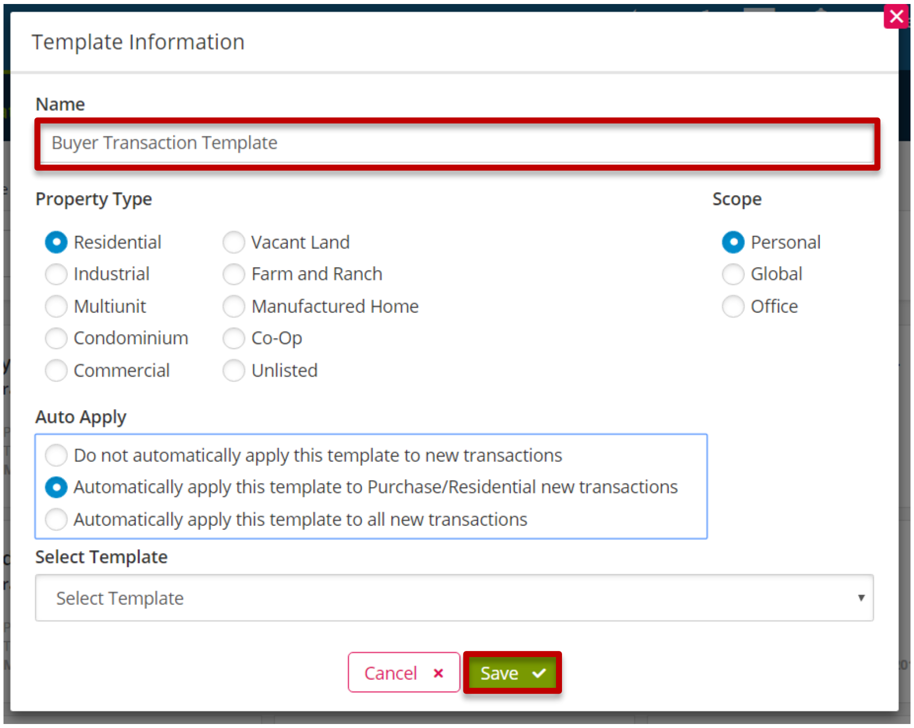


3. After clicking "New," a launch pad will appear. From here, choose your template type*.

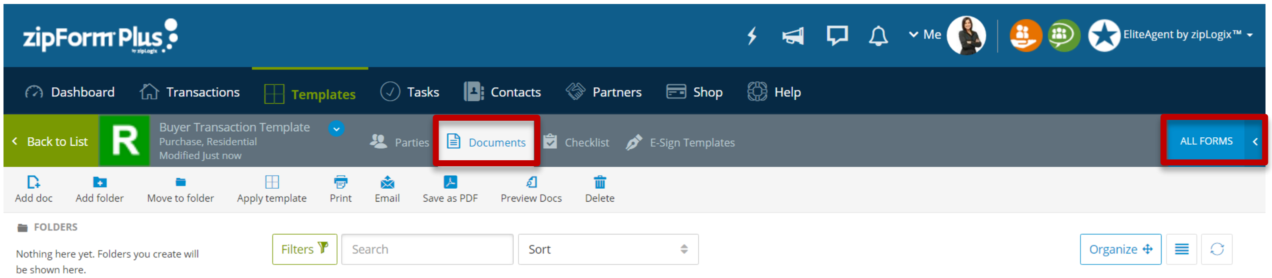
   *Your template type establishes a condition for the type of transaction to which the template will be applied.



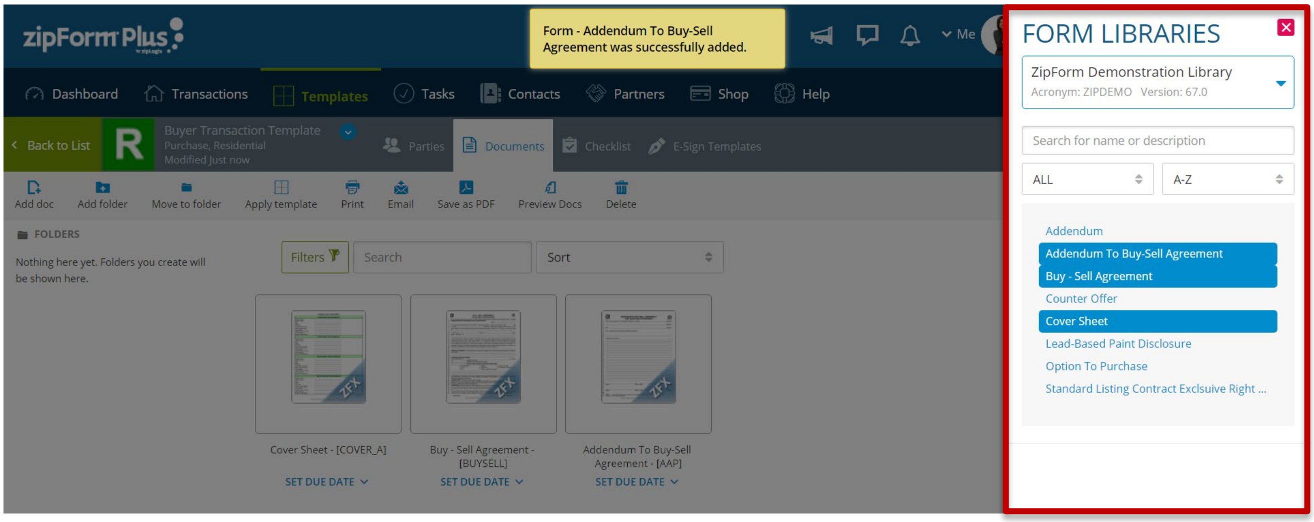
4. Once a template type is selected, the "Template Information" window will appear.
    - Enter the Template name, then select the Property Type and Scope*.
    - Individual Agent accounts will automatically default the scope to "Personal." "Global" and "Office" Scope selections are only available in Brokerage/Multi-user accounts, and are established by the Administrator.
    - Click "Save," at the bottom of this window, once all information has been entered or selected.



5. Upon clicking "Save," You will be taken to the "Documents" area. Click the "All Forms" button, on the right-hand side of the screen, to add forms to your new Template.

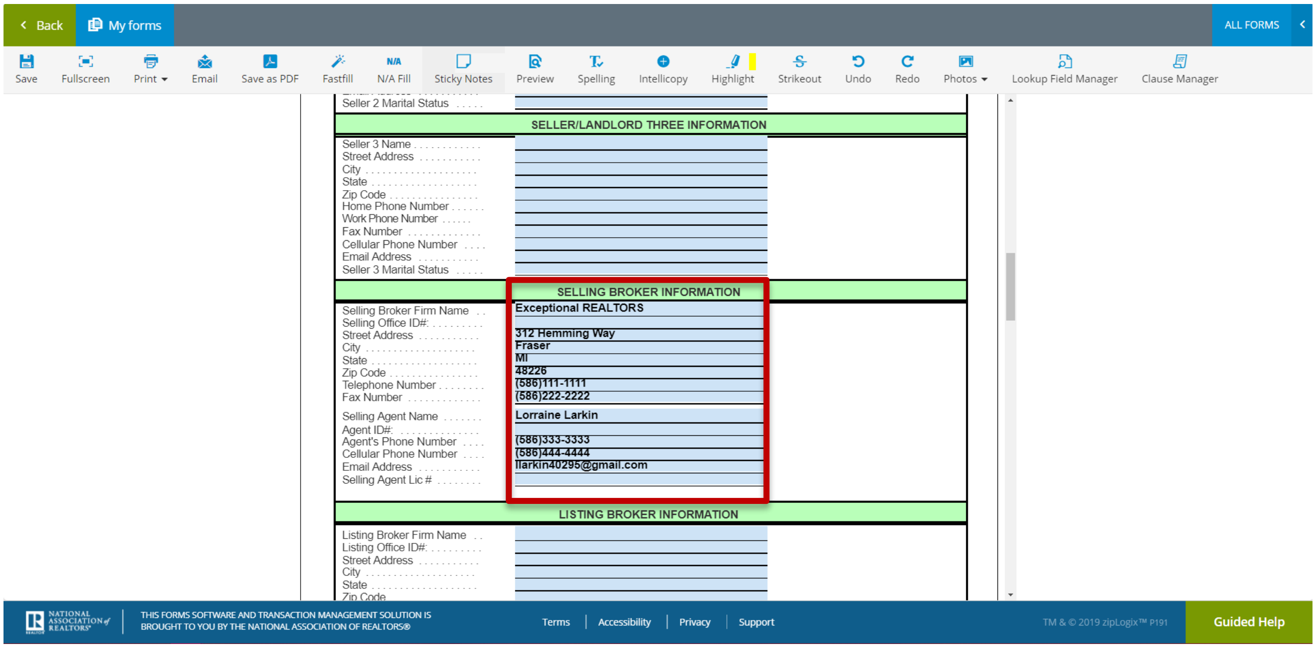


6. Clicking “All Forms” will expand your form libraries. Select forms to add to the new Template by clicking on the name of the forms from the list presented.

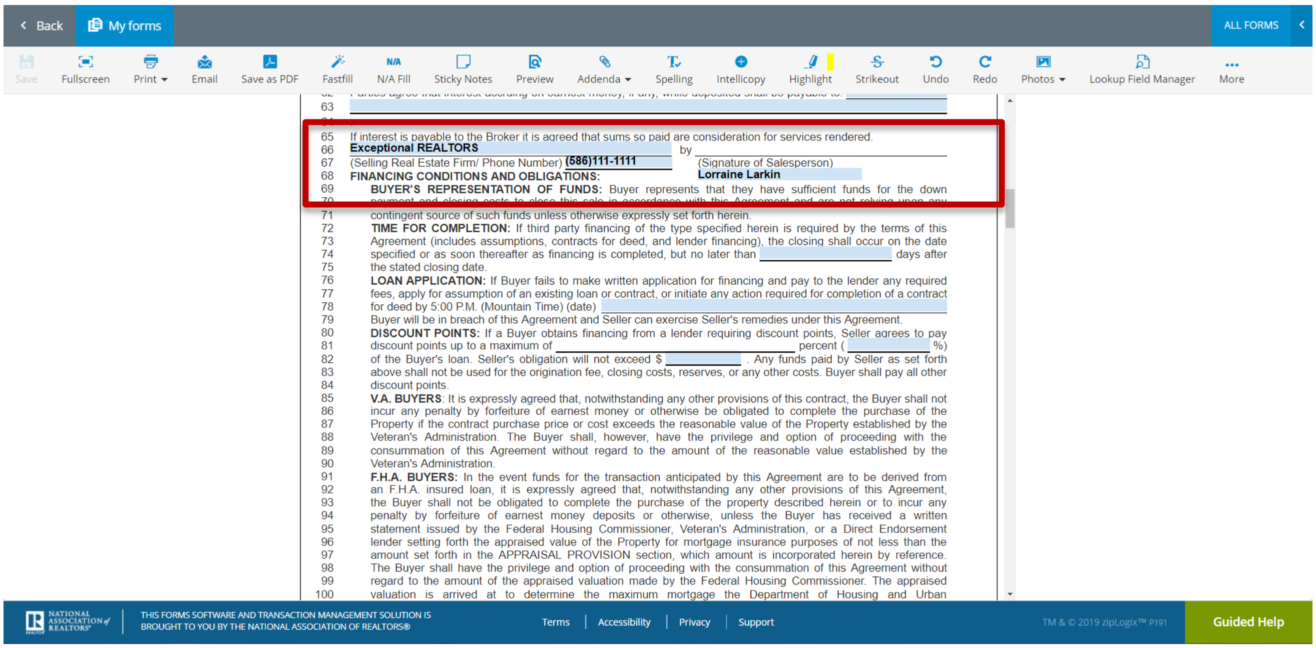


7. Once forms for this template are added, click on the form preview to open any form. Then, make any time-saving entries*.

*Remember to make entries that will be able to be re-purposed for multiple transactions of this type. You may wish to leave transaction-specific fields (e.g. Buyer, Seller, or Property information) blank, to be filled out later within the transactions themselves.

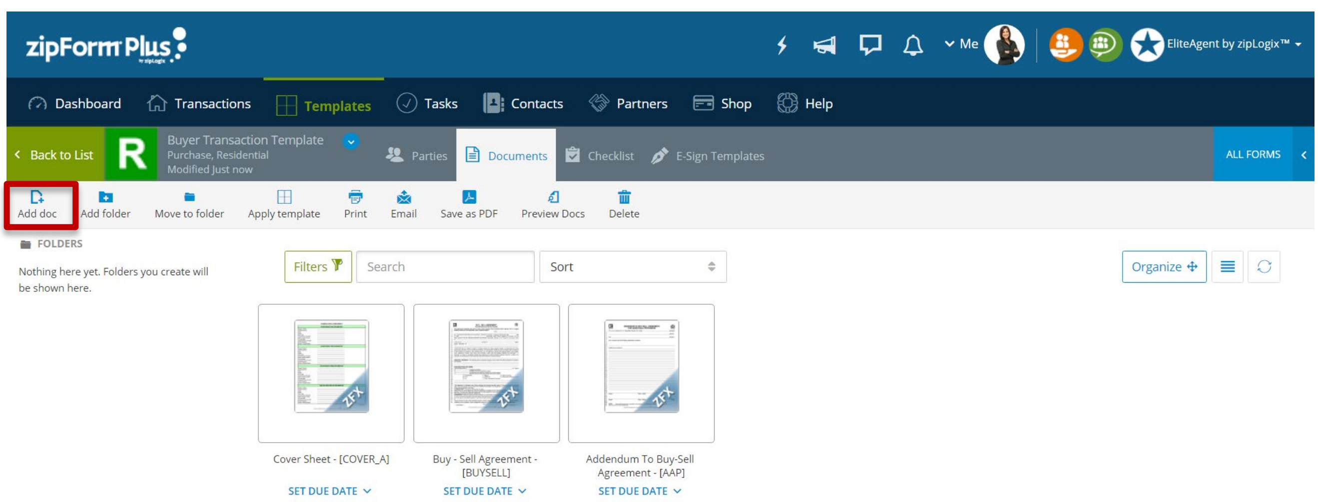


8. Open a different fillable form added to the Template, if applicable. You will notice that information entered into the Template form fields will auto-populate the same fields, if they exist, in other forms.



9. Once all time-saving entries within the Template's fillable forms are made, the Template is ready to be applied to a Transaction. Alternatively, add other pieces of data to the Template, including outside documents, placeholders, and/or checklists.

   To add an outside document (PDF) to the Template, click the "Add Doc" icon on the toolbar.

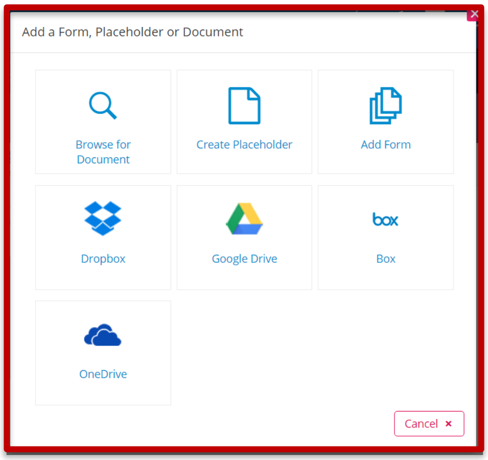


10. By clicking “Add Doc,” you will activate a Launch Pad which reads: “Add a Form, Placeholder, or Document,” and displays multiple options for adding forms or documents to your Template.

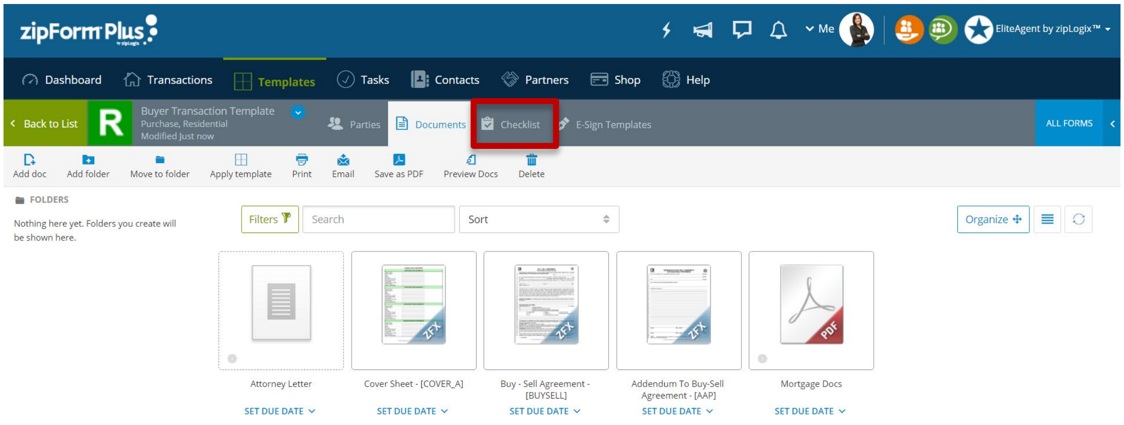
    Click on the applicable option to select documents to add:

    - “Browse for Document” allows an outside document to be pulled into the Template from your computer.
    - “Create Placeholder” creates a reminder slot to add data at a later time.
    - “Add Form” presents a shortcut to your forms library.
    - “Dropbox,” “Google Drive,” “Box,” and “OneDrive” all allow you to pull documents in from a cloud-based source on which you may have stored it.

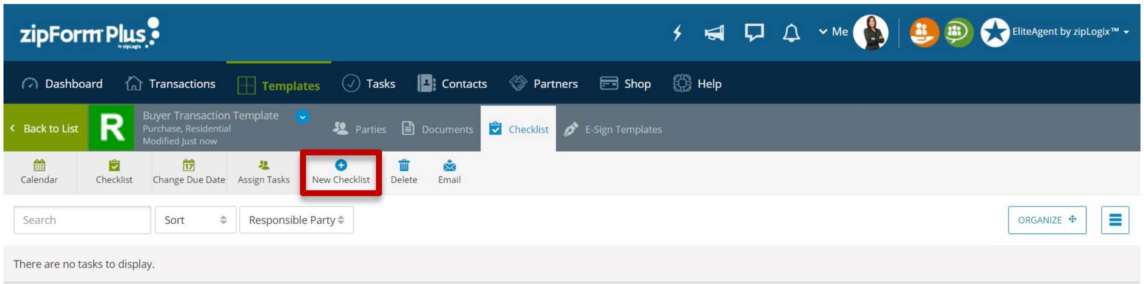
    Please note: Any forms/documents/etc. added from outside of zipForm® Plus will not be fillable or editable.

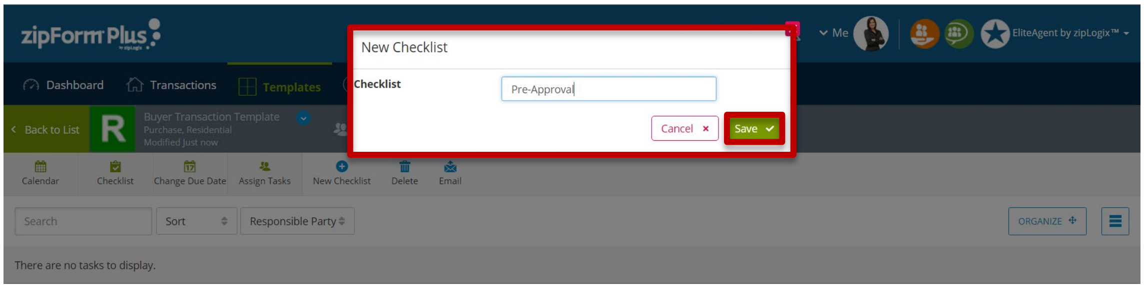


11. Once all applicable forms, documents, and other data are added to the Template, you may create a Checklist, if desired, to be re-purposed for the same type of transaction. To create a Checklist, navigate one tab to the right of “Documents” to “Checklist.”

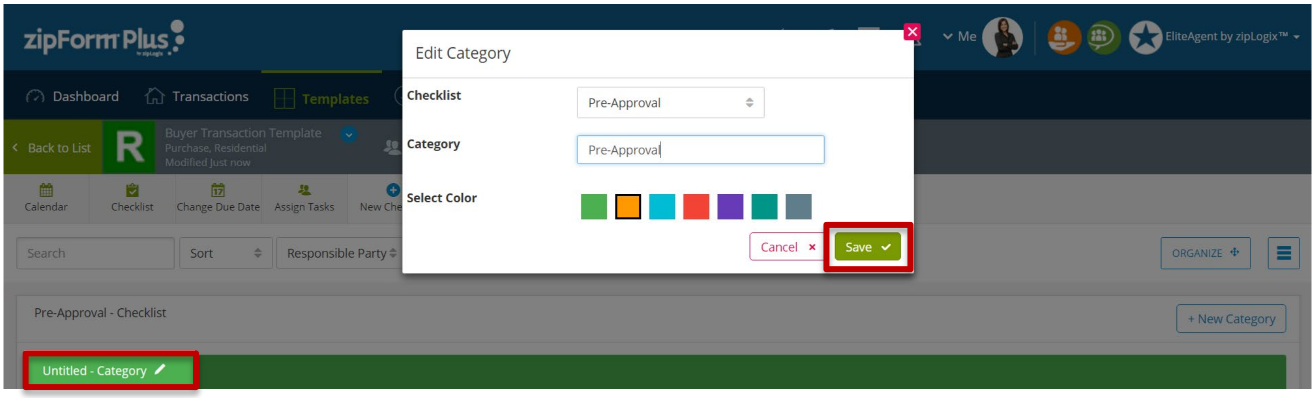


12. From the "Checklist" tab, add Checklists, and create action items (Tasks) within each of those Checklists. Click the "New Checklist" icon, on the toolbar and, establish a name for your Checklist. Once finished, click "Save."

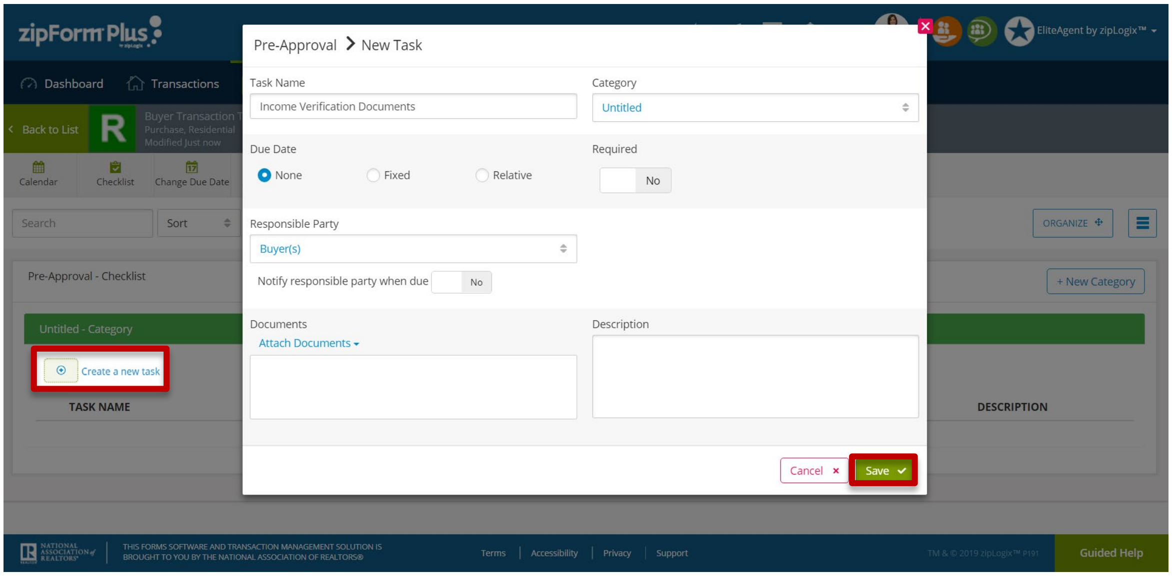




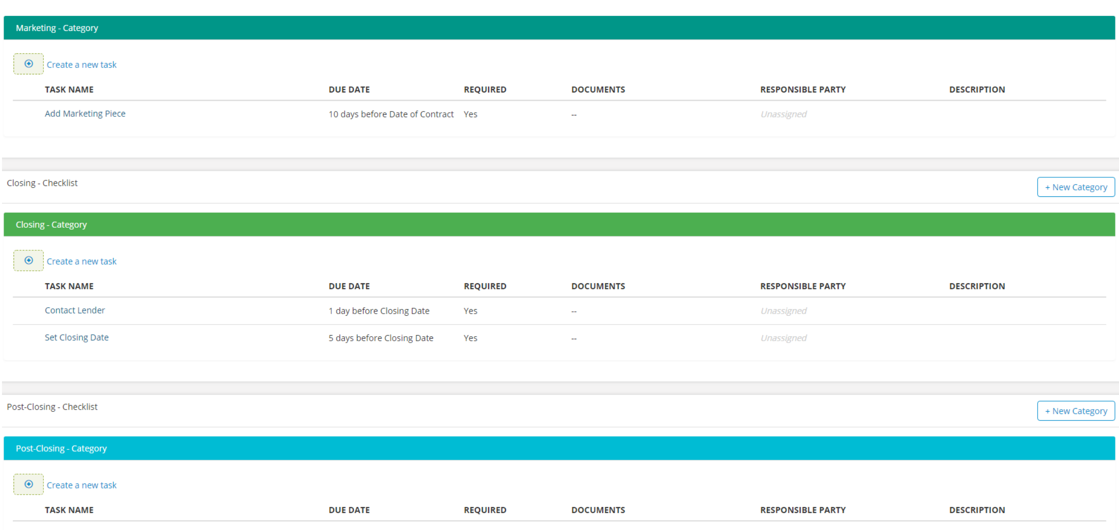
13. Below your new Checklist name, click on the pen icon to establish a Category name and color. Create a Category name with a color for your Checklist by selecting a color of your choosing, click "Save".



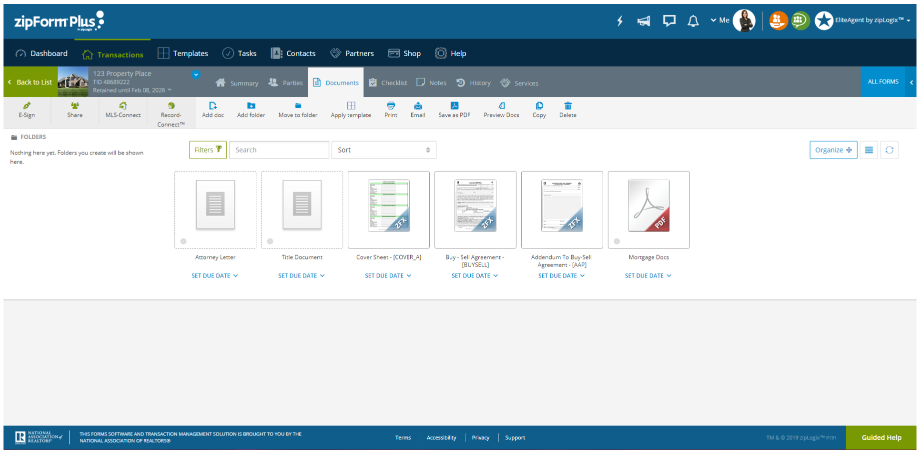
14. Click on the "Create a new task" icon to establish any Task as a sub-set of a Checklist. Create specifications and conditions for Tasks, such as due dates, requirement conditions, or Task notification specifications, click "Save".



15. A robust Template Checklist might look like the following:



16. This Template is now ready to apply to any Transaction of the same transaction and property type specifications.
    - The Template data will now be reflected within your Transaction any time this Template is manually or auto-applied.
    - Any time-saving entries to the Template forms will also carry over into Transactions. Your Template Checklist(s) will allow you manipulate due dates within the context of the Transaction.



Please note: Any modifications to Template data within a Transaction will not alter the content of the original Template. Any existing Template may be edited at any time. Any form revisions made at the request of your state/local association will be automatically updated, while retaining all saved Template information.