

How to Apply a Template

1. Create a new transaction.

The screenshot displays the zipForm Plus 20.04.01 web application. The top navigation bar includes the zipForm Plus logo and several icons. Below the navigation bar, there is a secondary menu with options like Dashboard, Transactions, Templates, DocInbox, Tasks, Contacts, Admin, Partners, and Help. A third menu contains various actions: View Forms, ListFlash, New, Import, Export, Delete, Approval, Set Status, Transfer, View RPR, and Txn Tools. The main content area shows a grid of transaction cards. A red box highlights the 'New' button in the top navigation bar, and a red arrow points from it to a text box that says "Click here to create a new transaction." The transaction cards display details such as title, user, status, and date.

| Title | User | Status | Date |
|---------------------------|-----------------------|----------------|-------------|
| For Release | Jeffrey F. Wright, II | Active | 2 days ago |
| TEST VOID | Jeffrey F. Wright, II | Failed Through | 6 days ago |
| Ln | Jeffrey F. Wright, II | Failed Through | 6 days ago |
| 123 Test with Andrew Lane | Jeffrey F. Wright, II | Active | 2 weeks ago |
| Test 3 | Jeffrey F. Wright, II | Active | 2 weeks ago |
| Test - April 5 2020 | Jeffrey F. Wright, II | Active | 3 days ago |
| JFW2 - Form Testers | Jeffrey F. Wright, II | Failed Through | 4 days ago |

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2. Name your transaction (When possible, property address is preferred.)
3. Choose a category.
 - a. Please remember to generalize your transaction type. If you have any type of residential property, choose “Residential.” If you have any type of commercial property, choose “Commercial.” This enables the proper template to be applied.

The screenshot displays the zipForm Plus 20.05.02 web application interface. The main form is titled "Transaction" and includes the following sections:

- Name***: A text input field containing "Jeff Test 3".
- Select your location**: A dropdown menu showing "Trumbull, 105 Technology Drive, Suite 1A".
- Import Property Information**: A section with a checkbox for "zipForm Record-Connect™".
- Category***: A group of radio buttons for "Residential", "Industrial", "Multiunit", "Condominium", "Commercial", "Vacant Land", "Farm", "Manufacturing", and "Other".
- Status**: A group of radio buttons for "Active", "Pending", "Prospect", "Inactive", and "Fell Through".
- Select Template**: A dropdown menu showing "My Templates".
- Templates Automatically Applied by Admin**: A table with columns "Template Name", "Scope", and "Checklists".
- Comments**: A text area labeled "Transaction Comments".

At the bottom of the form are "Cancel" and "Save" buttons. The background shows a sidebar with "TRANSACTION NAME" and a list of transactions, and a calendar view on the right.

| Template Name | Scope | Checklists |
|---|--------|------------|
| Residential Listing - Trumbull (Checklist Only) | Office | true |

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4. Template Choice

- a. We have recently switched a few settings to enable specific templates to automatically apply to a given transaction based on the type of transaction you create.
- b. You may still choose a personal template in addition to the automatically applied template.

The screenshot shows the zipForm Plus 20.05.02 web interface. The main form is titled "Name*" and contains the text "Jeff Test 3". Below this is a "Select your location" dropdown menu showing "Trumbull, 105 Technology Drive, Suite 1A". The "Import Property Information" section includes a checkbox for "zipForm Record-Connect™" and a "Category*" section with radio buttons for Residential (selected), Industrial, Multiunit, Condominium, Commercial, Vacant Land, Farm and Ranch, Manufactured Home, Co-Op, Unlisted, and Other. The "Status" section has radio buttons for Active (selected), Pending, Prospect, Inactive, and Fell Through. The "Select Template" section shows a dropdown menu with "My Templates" selected. Below this is a table of "Templates Automatically Applied by Admin":

| Template Name | Scope |
|---|--------|
| Residential Listing - Trumbull (Checklist Only) | Office |

At the bottom of the form are "Cancel" and "Save" buttons. The interface also shows a sidebar with navigation options like "Dashboard", "Transaction", "View Forms", and "ListFlash". A table of transactions is visible on the left, and a table of milestones is on the right. Three red callout boxes are overlaid on the image:

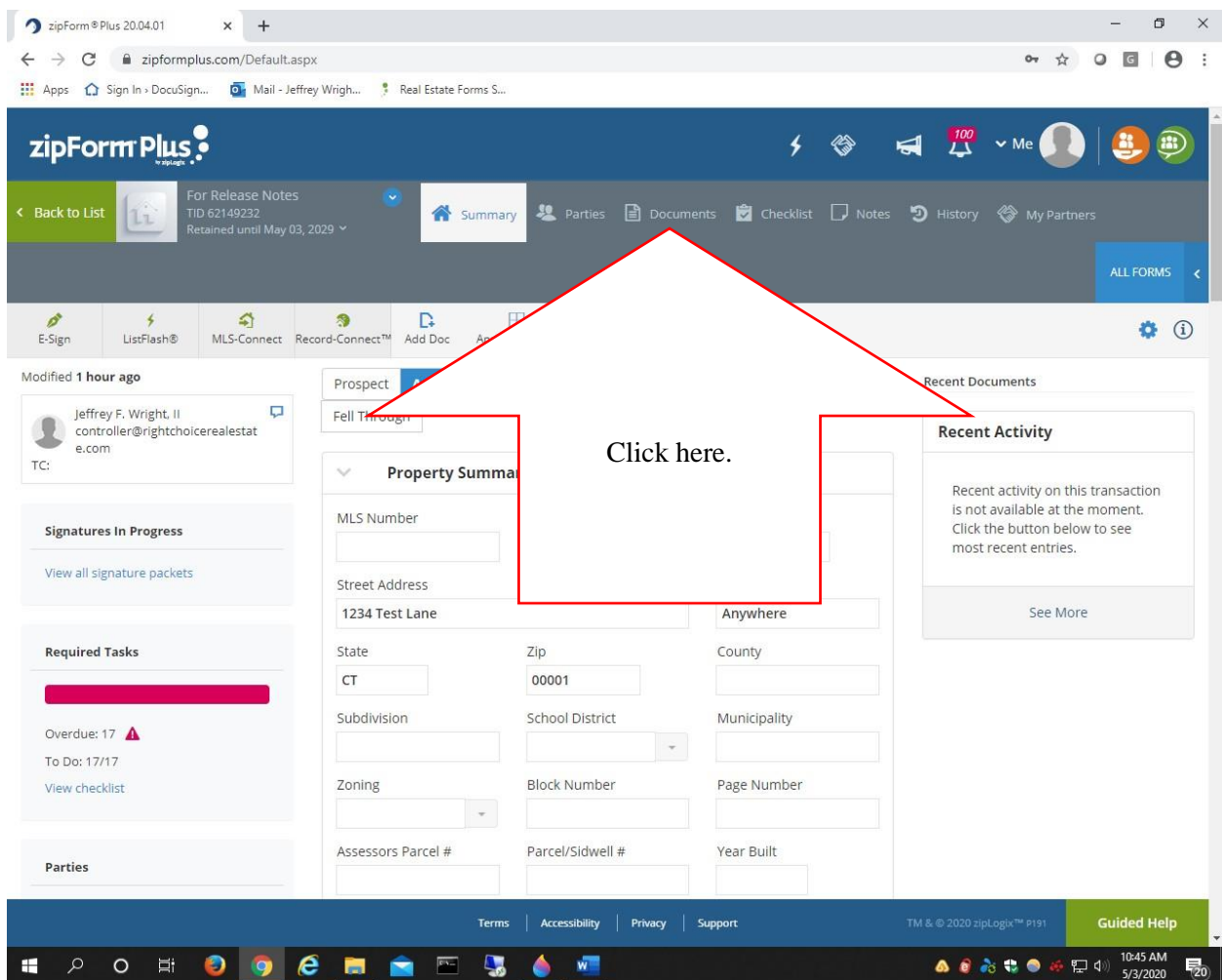
- A box pointing to the "My Templates" dropdown menu with the text: "Do you have a personal template you want to use in addition? Choose it here."
- A box pointing to the "Residential Listing - Trumbull (Checklist Only)" entry in the table with the text: "Auto-applied template."
- A box pointing to the "Save" button with the text: "Remember to save."

How to Apply a Template

What if I forgot to add my own personal template, or I did not choose the correct category for a template to auto-apply, or both?

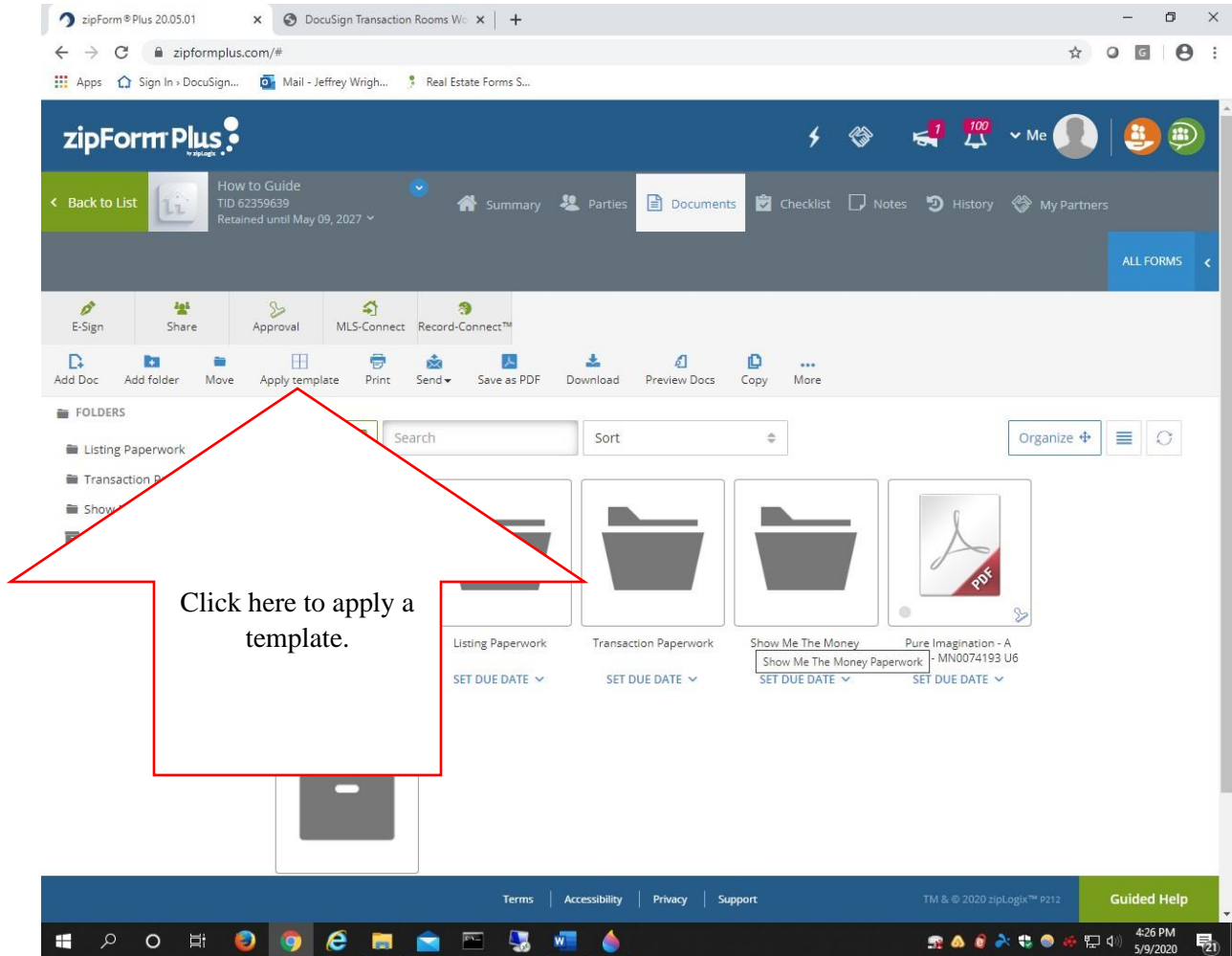
You can add a template from the “Documents” page of your transaction.

**Depending on the viewing layout you have chosen, this can be done from the “Transaction Summary” page of your transaction as well.*



How to Apply a Template

Click on the “Apply Template” icon.



How to Apply a Template

Choose a template (or templates to apply) and click ok.

The screenshot shows the zipForm Plus 20.05.02 web application. A modal window is open, displaying a table of templates. A red arrow points to the table with the text "Choose template(s) to add." Another red arrow points to the "Apply" button with the text "Click apply." The table has the following data:

| TEMPLATE NAME | SCOPE | HAS CHECKLISTS |
|--|----------|----------------|
| <input type="checkbox"/> Residential Listing - Trumbull (Checklis... | Office | Yes |
| <input type="checkbox"/> Residential Lease - Tenant Side - Trumbu... | Office | Yes |
| <input type="checkbox"/> Residential Lease - Landlord Side - Trum... | Office | Yes |
| <input type="checkbox"/> Residential Transaction - Trumbull (Chec... | Office | Yes |
| <input type="checkbox"/> MY Listing Template | Personal | No |

You have now successfully applied a template.