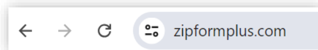
zipForm® Plus Broker Edition: Create an Office or Global Template

Create custom templates containing forms, placeholders, and folders for specific offices within your brokerage (Office) or for all users within your brokerage (Global). Office and Global templates are editable by Broker Admins only.

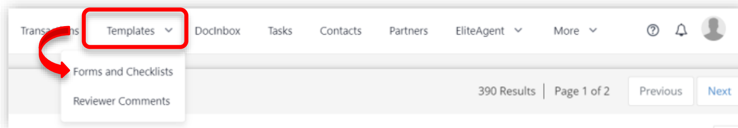
Create an Office Template (for a specific office) or a Global Template (for all users)

You can create templates for a *specific office or offices* and for *all users* within your zipForm brokerage account.

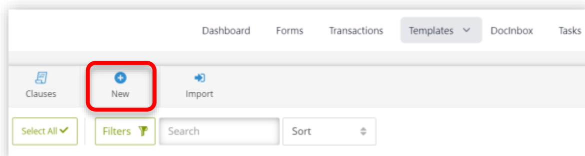
1. Open a browser and login to your zipForm brokerage account at www.zipformplus.com.



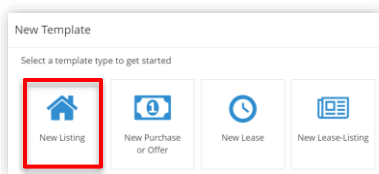
2. Click **Templates** and select **Forms and Checklists** from the menu.



3. Click **New+** to create a new template.



4. Select a template type.



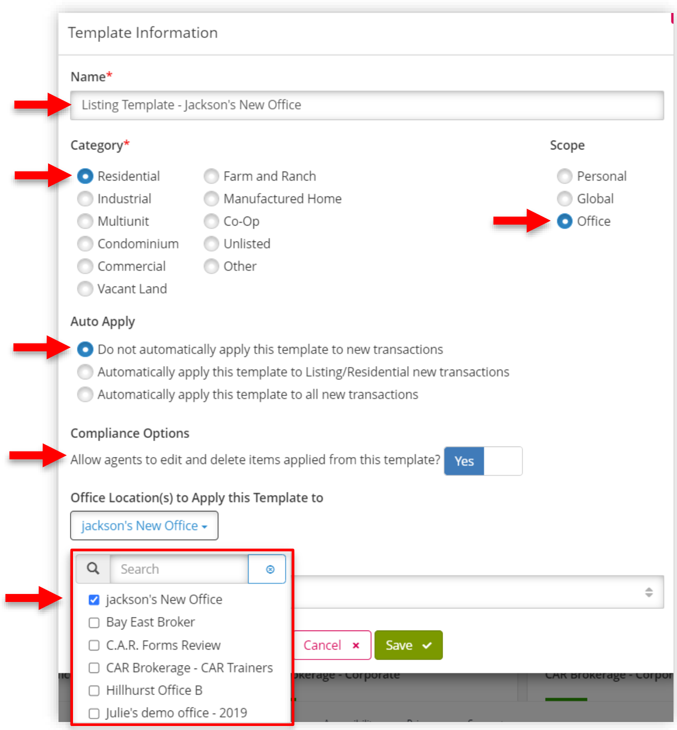
<u>Office Template</u>

You can create a template for a specific office, or offices, within your brokerage account.

1. Complete the following fields:

- **Name** – *(required)* type the name of the template.
- **Category** – *(required)* select the property type for this template.
- **Scope** – select "Office" to create a template for a specific office or offices in your brokerage account.
- **Auto Apply** – *(if applicable)* choose whether to automatically apply this template or leave as the default of "Do not automatically apply…".
- **Compliance Options** – this is ON by default. This setting allows agents to delete forms inside a transaction that this template was applied to. It is recommended to leave this setting ON.
- **Office Location(s)** – *(required)* click the dropdown menu and check the box next to the office, or offices, that this template applies to.

2. Click **Save** to continue.



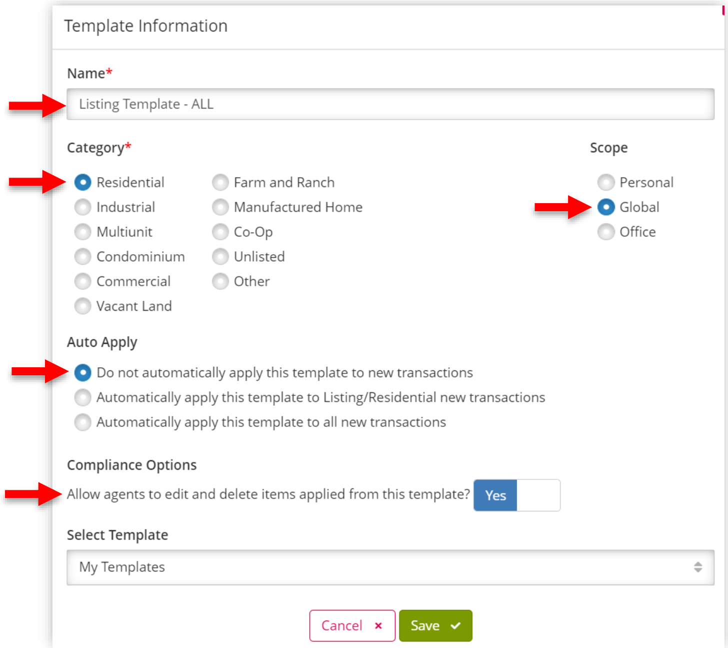
Global Template

You can create a template for all users in your brokerage account.

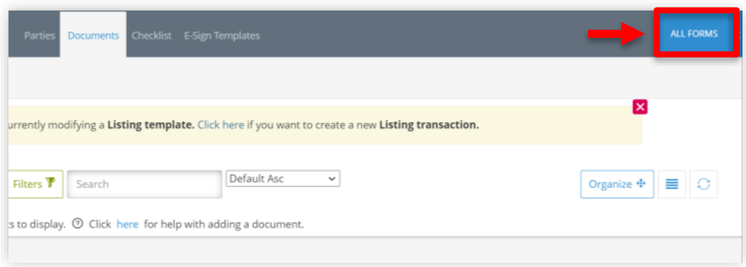
1. Complete the following fields:

- **Name** – *(required)* type the name of the template.
- **Category** – *(required)* select the property type for this template.
- **Scope** – select "Global" to create a template for all users in your brokerage account.
- **Auto Apply** – *(if applicable)* choose whether to automatically apply this template or leave as the default of "Do not automatically apply…".
- **Compliance Options** – this is ON by default. This setting allows agents to delete forms inside a transaction that this template was applied to. It is recommended to leave this setting ON.

2. Click Save to continue.



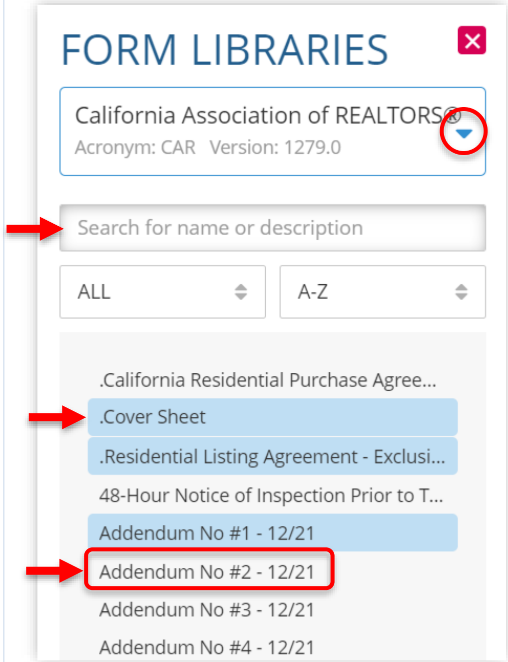
3. Click the **All Forms** button on the top right side to add forms to the template from your form libraries.



4. Functions in the **Form Libraries** menu:

- **Library** – click the dropdown arrow to the right of the library name to select a different library or to select "All Libraries".
- **Search** – type a form name, a keyword in the form name, or a form acronym in the search bar to search for a form.
- **Forms in blue** – forms that have a blue highlight are already in your template and cannot be selected again.
- **Add a form** – click on the name of a form to add it to your template.

5. Click ✕ to close the menu.



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Click **Back to List** to exit the template and return to the Templates tab.

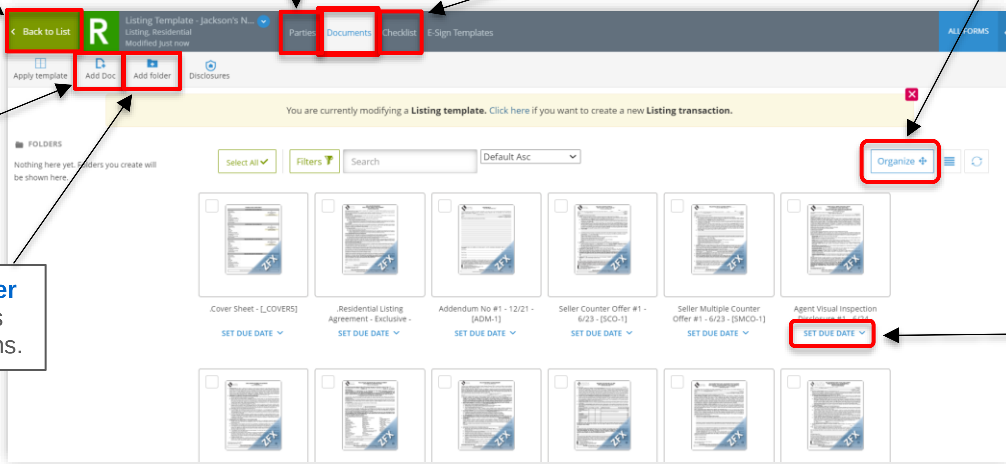
Click **Parties** to add your brokerage name and broker license number to the Listing Agent or Selling Agent roles.

Click **Checklist** to create a custom checklist for this template.

Click **Organize** to drag and drop forms into a different order.

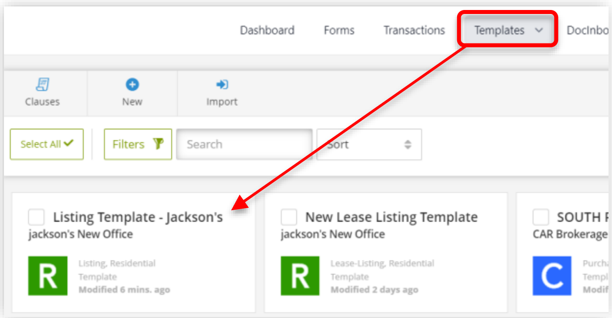
Click **Add Doc** to upload PDF files and create placeholders.

Click **Add Folder** to create folders to organize forms.



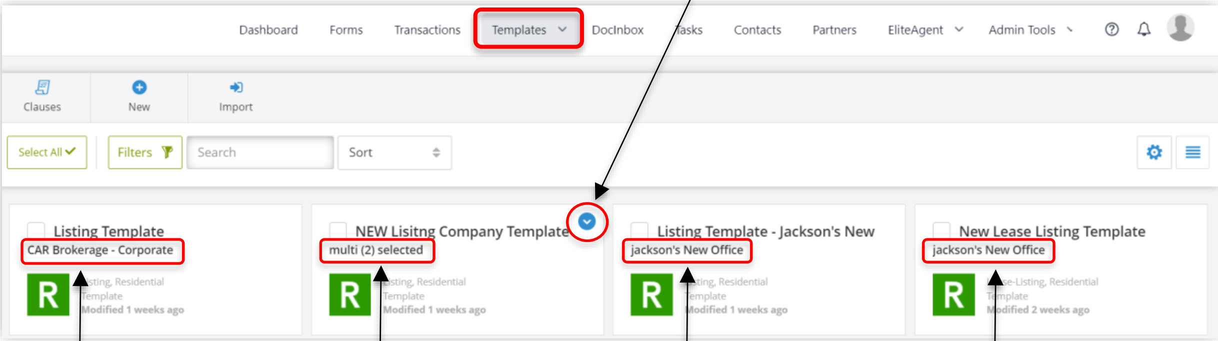
Click **SET DUE DATE** to assign form due dates relative to transaction events.

6. The template you created will display at the top of the list.



Viewing Templates on the Templates tab:

To view template details, hover your mouse over a template, click the blue dropdown arrow, and select **Template Details** from the menu.



Global Template

Office Template – multiple offices

Office Template – single office

Office Template – single office