

Creating Templates in ZipForm Online

Consider using the template feature when a clause is always used for a particular transaction or a group of forms is used repeatedly.

There are two options for adding a template in ZipForm Online.

“Save As” option -

1. Choose an existing transaction. Click on the Select Actions drop-down menu from the Transaction/Template List window and choose the Save As action.

The screenshot shows the ZipForm Online interface. At the top, there is a search window titled "Find Transaction / Template" with fields for Name, Transaction / Template (set to "Active Transaction"), Transaction Type (set to "All"), and Property Type (set to "All"). Below this is a table titled "Transaction / Template List" with columns for Name, Status, Seller, Buyer, Modified, and Created. The table contains several rows of transactions. A red arrow points to the "Select Action" dropdown menu for the "test4" transaction, which is open and shows the "Save As" option selected.

Name	Status	Seller	Buyer	Modified	Created
asdfsdf	Active			9/21/2007	9/21/2007
Conv Sample	Active			9/21/2007	9/21/2007
convention sample	Active			9/17/2007	9/17/2007
abcd sample	Active			7/26/2007	7/26/2007
abc property	Active			4/24/2007	4/24/2007
sample test	Active			1:03:17 PM	1:01:02 PM
sdfsdf	Active			12:06:42 PM	12:04:55 PM
test5	Active			11/21/2006	11/21/2006
test4	Active			12:31:33 PM	12:31:33 PM
test4	Active			9/28/2006	9/28/2006
test4	Active			2:34:10 PM	2:34:10 PM
test4	Active			9/18/2006	9/18/2006
test4	Active			10:03:07 AM	10:03:07 AM
test4	Active			9/18/2006	9/18/2006
test4	Active			9:57:38 AM	9:57:38 AM

2. Next, name the template and choose “Agent Template” from the Transaction/Template list. Click the Copy button.

The screenshot shows the ZipForm Online interface with the "Copy Transaction / Template" dialog box open. The dialog has a "General Information" section with the following fields: Name (listing template), Transaction / Template (Agent Template), Transaction Type (Please Select...), and Property Type (Agent Template). A red arrow points to the "Agent Template" option in the Property Type dropdown menu. The "Copy" button is visible at the bottom right of the dialog.

- Next, find the agent template from the Find Transaction/Template window and select the Open action. Since this is a copy of an existing transaction you will want to remove any transaction specific information.

The screenshot shows the ZipForm Online web application interface. At the top, there is a navigation bar with 'TRANSACTIONS', 'ADMINISTRATION', 'HELP', and 'LOGOFF'. Below this is a search bar with the email 'kristim@wra.org' and a link for '(Additional Products) [Clause Manager]'. The main content area is divided into two sections:

Find Transaction / Template

This section contains a search form with the following fields:

- Name:
- Transaction / Template: **Agent Template** (dropdown menu)
- Transaction Type: **All** (dropdown menu)
- Property Type: **All** (dropdown menu)

Buttons for 'Find' and 'Reset' are located at the bottom right of the search form. A red arrow points to the 'Agent Template' dropdown menu.

Transaction / Template List

This section displays a table of templates with columns for Name, Status, Seller, Buyer, Modified, and Created. A context menu is open over the table, showing various actions. The 'Open' action is highlighted, and a red arrow points to it. The 'TransactionOpen' option is also visible in the context menu.

Name	Status	Seller	Buyer	Modified	Created
listing template	Agent Template			9/21/2007 3:58:04 PM	9/21/2007 3:58:04 PM
template2	Agent Template			5/19/2005 3:23:58 PM	5/19/2005 2:23:33 PM
template1	Agent Template			5/19/2005 3:22:49 PM	5/19/2005 2:21:56 PM
Listing Template	Agent Template			2/10/2005 12:45:57 PM	2/10/2005 12:43:58 PM
Smith 2	Agent Template			10/12/2004 11:37:35 AM	10/12/2004 11:36:09 AM
abcs	Agent Template			1/28/2003 6:39:53 AM	1/28/2003 6:39:53 AM

“Add Transaction” option –

1. Click the Add (Create) button from the Transaction/Template List window.

Find Transaction / Template

Name:

Transaction / Template:

Transaction Type:

Property Type:

Find Reset

Name	Status	Seller	Buyer	Modified	Created	
asdfasdf	Active			9/21/2007 9:18:31 AM	9/21/2007 9:18:31 AM	Select Action
Conv Sample	Transaction			9/12/2007 9:12:11 AM	9/12/2007 9:12:11 AM	Select Action
convention sample	Active			9/17/2007 4:04:52 PM	9/17/2007 4:04:52 PM	Select Action
abcd sample	Transaction			7/26/2007 12:49:03 PM	7/26/2007 12:49:03 PM	Select Action
abc property	Active			4/24/2007 1:03:17 PM	4/24/2007 1:01:02 PM	Select Action
sample test	Transaction			2/15/2007 12:06:42 PM	2/15/2007 12:04:55 PM	Select Action
sdfasdf	Active			11/21/2006 12:31:33 PM	11/21/2006 12:31:33 PM	Select Action
test5	Transaction			9/28/2006 2:34:10 PM	9/28/2006 2:34:10 PM	Select Action
test4	Active			9/18/2006 10:03:07 AM	9/18/2006 10:03:07 AM	Select Action
test4	Transaction			9/18/2006 9:57:58 AM	9/18/2006 9:57:58 AM	Select Action

2. Name the template. Click the Transaction/Template drop down arrow and choose “Agent Template.” Click the Add button. The template will open in the Form Manager where you can add forms and data.

TRANSACTIONS ADMINISTRATION HELP LOGOFF OFFICIAL FORMS SOFTWARE NATIONAL ASSOCIATION OF REALTORS

kristim@wra.org [Additional Products] [Clause Manager]

Add Transaction / Template

General Information * Required Fields

* Name: residential listing template

* Transaction / Template: Agent Template

* Transaction Type: Listing

* Property Type: Residential

Template: None...

Import:

Add Cancel

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