zipForm® Plus: Create & Update a Personal Template

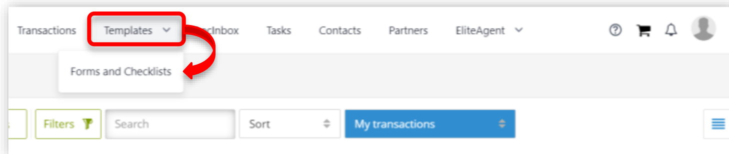
CALIFORNIA ASSOCIATION OF REALTORS®

Templates are a great way to set the foundation for your transactions going forward. Create a personal template containing required forms and forms you use often, your agent information, placeholders, checklists, folders, and more! Templates are optional.

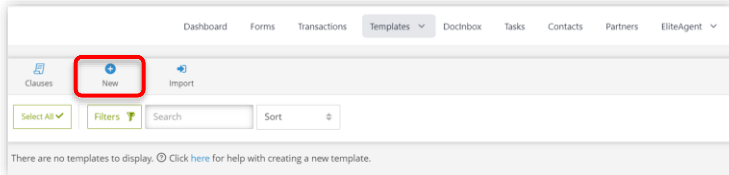
Create a Personal Template

1. Open a browser and login to your zipForm account at [www.car.org.](http://www.car.org)

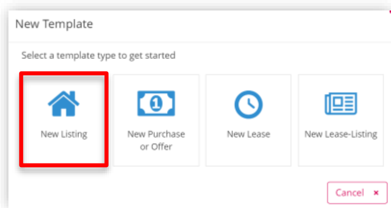
2. Click **Templates** in the top navigation bar, then click **Forms and Checklists** in the dropdown menu.



3. Click **New+** in the top toolbar.



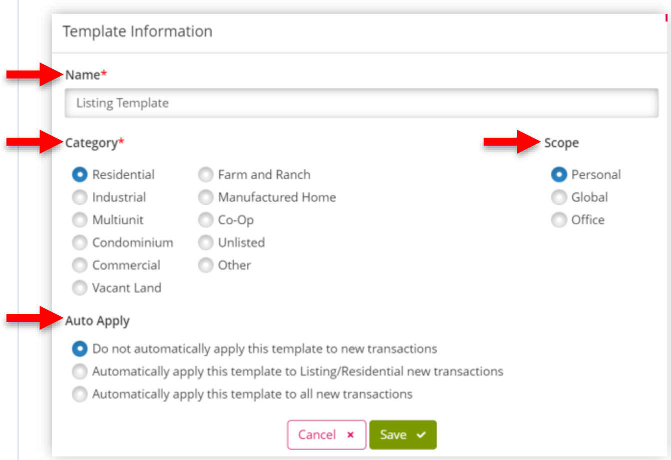
4. Click to choose a template type.



5. Complete the following fields:

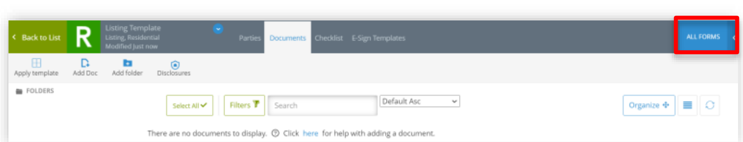
- **Name** = *(required)* type a name for your template (ex. Listing Template).
- **Category** = *(required)* select the property type for this template.
- **Scope** = Personal *(default is Personal and cannot be changed in individual zipForm accounts)*
- **Auto Apply** = *(optional)* make a selection or leave as default "Do not automatically apply…".

6. Click Save ✓ to continue.



<u>Add Forms</u>

7. Click the blue **All Forms** button on the right side to select forms from your form libraries.

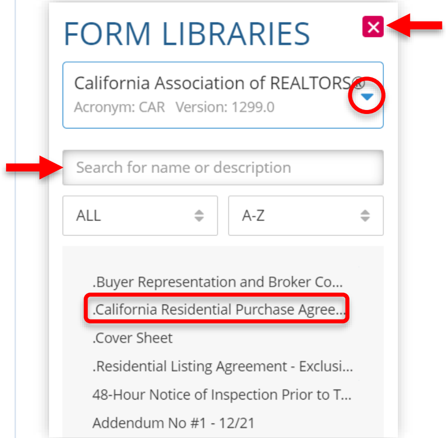


8. Click the **dropdown arrow** at the top right to select a different library or all libraries.

9. Type a keyword or form acronym in the **Search** field to search for a specific form.

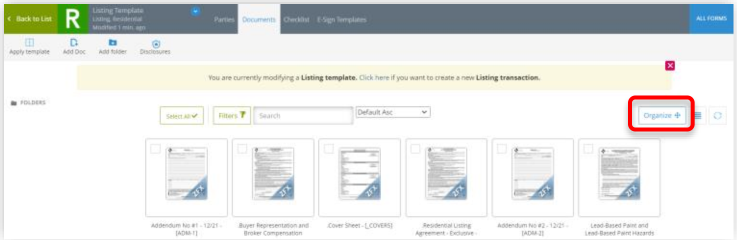
10. Click on the name of a form to add it to your template.

11. When finished, click in the top right corner to close the Form Libraries menu.



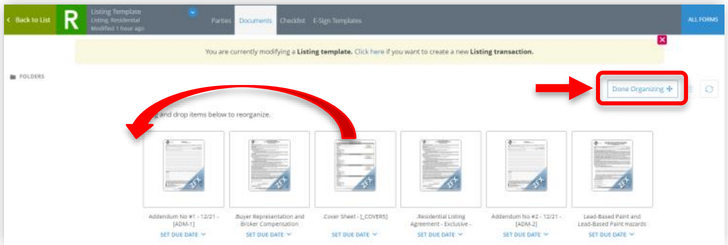
<u>Organize Forms</u> *(optional)*

12. Click **Organize** on the right side to rearrange the order of the forms in your template.



13. Click and drag forms into the order you'd like.

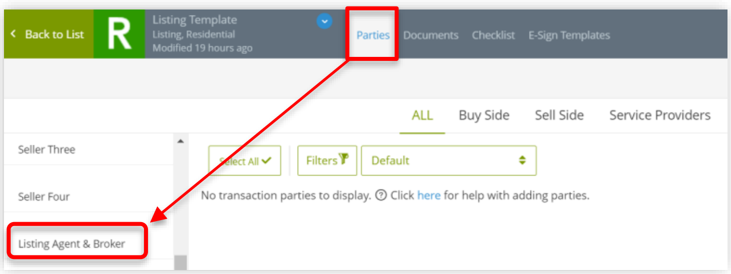
14. When finished, click **Done Organizing** to save your changes.



<u>Add Your Agent Information</u>

15. Click **Parties** in the gray navigation bar.

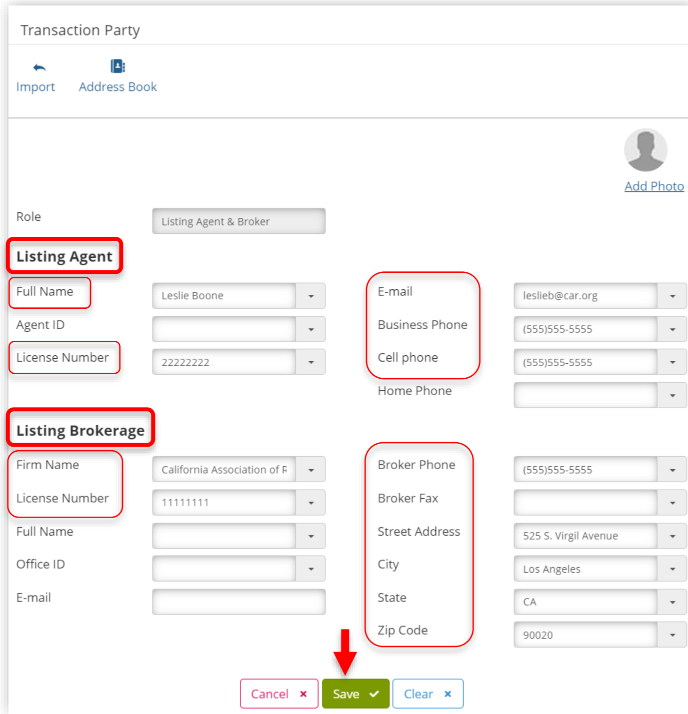
16. On the left-hand side, scroll down and click the role for Listing Agent & Broker (for a listing template) or Selling Agent & Broker (for a purchase template).



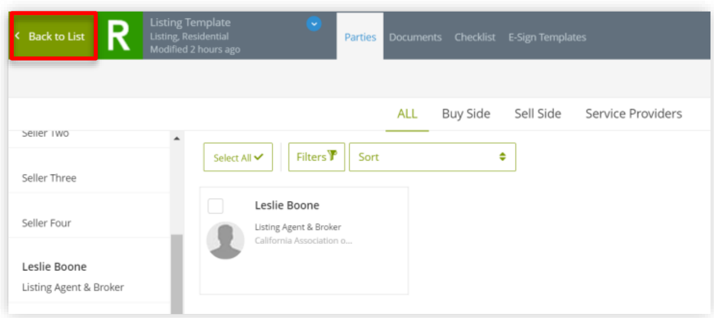
17. Complete the following fields:

- **Listing Agent:**
    - Full Name (first and last)
    - License Number
    - E-mail
    - Business Phone
    - Cell Phone
- **Listing Brokerage:**
    - Firm Name
    - License Number (Brokerage license number)
    - Broker Phone (this can be your phone number or your office phone number)
    - Street Address
    - City
    - State
    - Zip Code

18. Click Save to save your changes and return to the Parties tab.



19. Click Back to List to return to **Templates**.

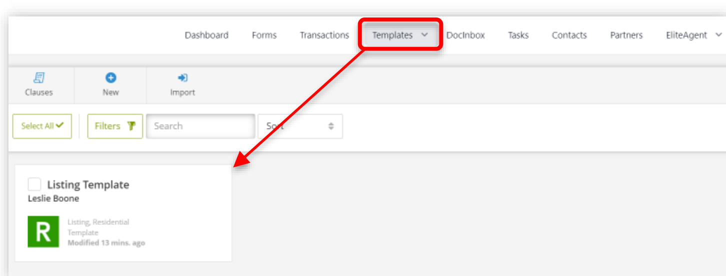


Your new template will display in the **Templates** tab.

IMPORTANT: The ***only*** time you will come to the Templates tab is to:

- **Edit** – edit an existing template.
- **Add** – add a new template.
- **Delete** – delete a template.

To ***use*** a template, you will go to the Transactions tab and either create a new transaction or apply your template to an existing transaction.



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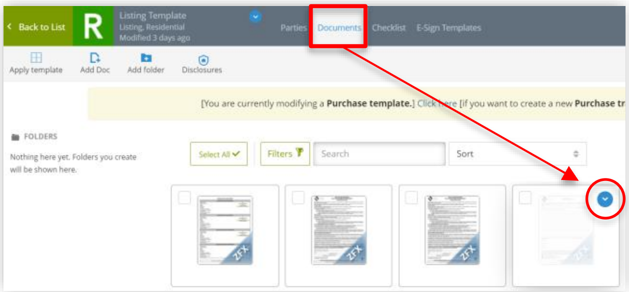
Update a Personal Template

IMPORTANT: Forms inside a template ***will automatically update***, with the following exceptions:

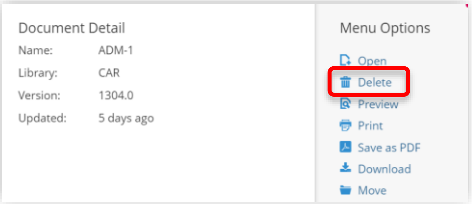
- **Form Name or Acronym Change** – if a form has a name change or an acronym change, then you will need to manually update the form inside your template by deleting the existing form and adding the new form from the blue **All Forms** menu. *(See section above labeled "Add Forms")*
- **New Forms** – if there is a new form that you would like to see in your template, you will need to manually add it from the blue **All Forms** menu. *(See section above labeled "Add Forms")*
- **Retired Forms** – if there is a form that has been retired, you will need to manually remove/delete it from your template.

Delete a Single Form

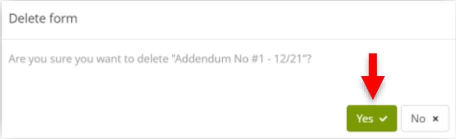
1. To delete a single form from a template, hover your mouse over the form and click the **More Actions** dropdown arrow.



2. Select **Delete** from the menu.

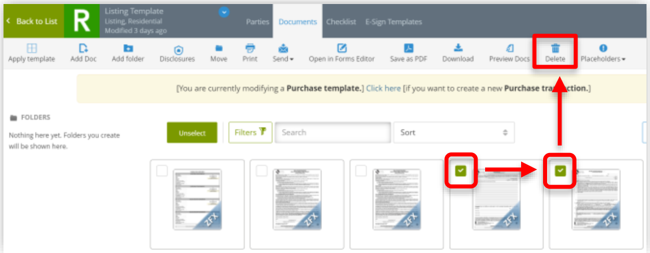


3. Click **Yes** to delete the form from your template.



Delete Multiple Forms

4. To delete multiple forms from a template, **check the box** on each form you'd like to delete, then click **Delete** in the top toolbar.



5. Click **Yes** to delete the forms from your template.