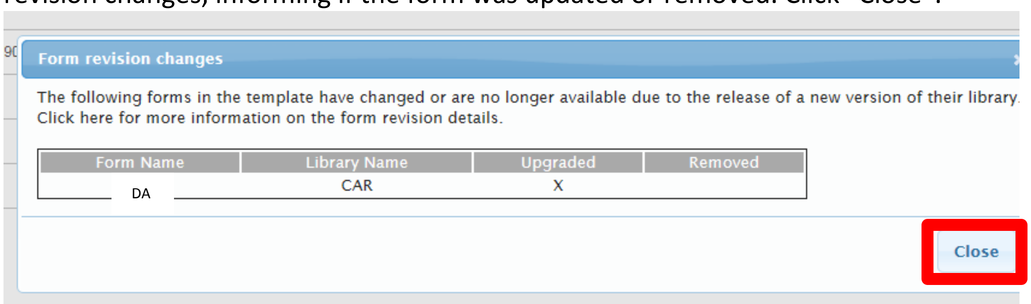
Updating a removed C.A.R. form from your templates in zipForm® Plus

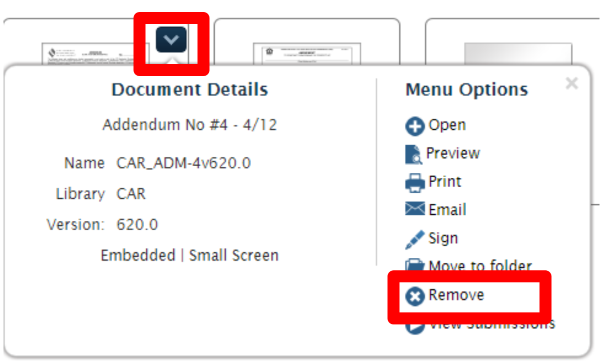
Templates are time saving tools that you can use to create transactions quickly with commonly used forms and information. Follow these steps on how to update your template when a C.A.R. form (Ex: C.A.R. Form DA) has been removed and replaced by a new C.A.R. form (C.A.R. Form PRBS).

1. Log into zipForm® Plus.
2. Click Templates tab.
3. Click on the template you would like to update, a pop up will appear regarding form revision changes, informing if the form was updated or removed. Click “Close”.



*Please note: updated forms will auto update in the template. Only removed (discontinued forms) needs to be manually updated.

4. Hover over the form that has been discontinued, click on the arrow on the top right corner. A drop down will appear, click on “Remove”. A prompt will appear, click on “Delete”.



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5. To add a new form, got Click on “All Forms” and click on the form you would like to add. It will then be added to the template.

6. Remember to hit “Save” on your toolbar!

Quick Tips!

1. Don't forget to add the Cover Sheet-CS form to your template forms list! It auto-populates all the info into all forms in the template.
2. Enter your agent information on Page 3 of the Cover Sheet form to have your info auto-populate each time you apply the template.
3. Click Save button.

Apply Templates to A Transaction

1. Click the “Transaction” tab.
2. Click “New” button on the toolbar.
3. Provide a Transaction name.
4. Assign a Transaction and Property type.
5. Use the Apply Template drop-down menu to select the template you wish to apply
6. Click “Save” on your toolbar!

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