Adding and Editing Templates

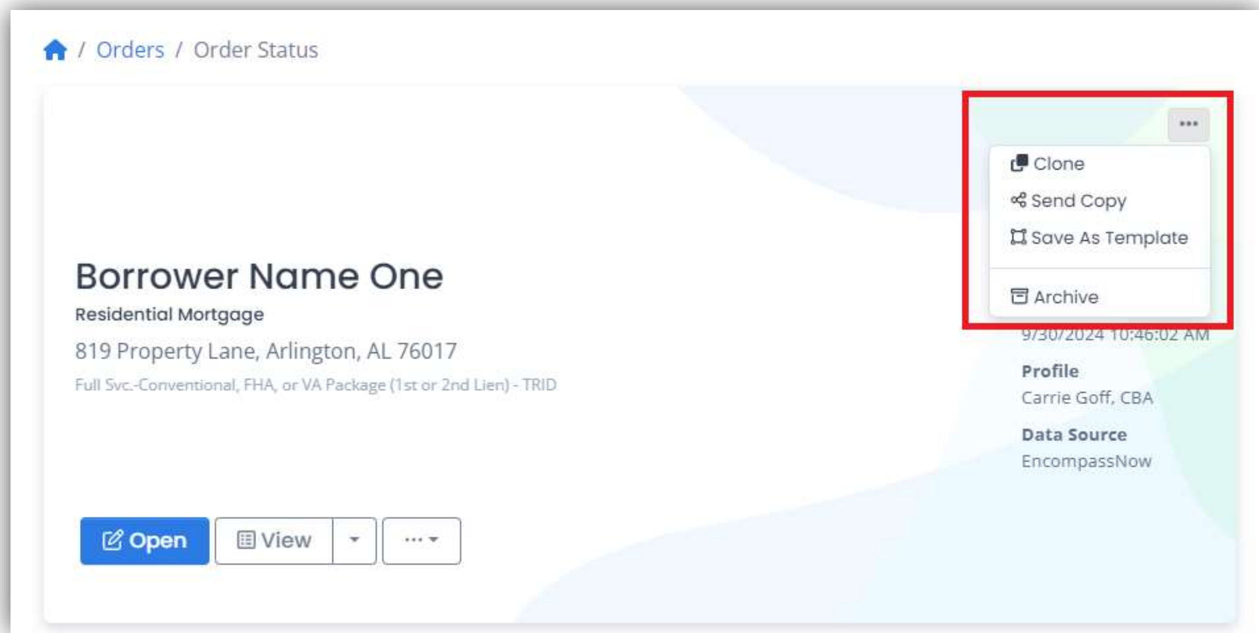
You have two options when creating templates –

1. Create from existing files
2. Create a blank template

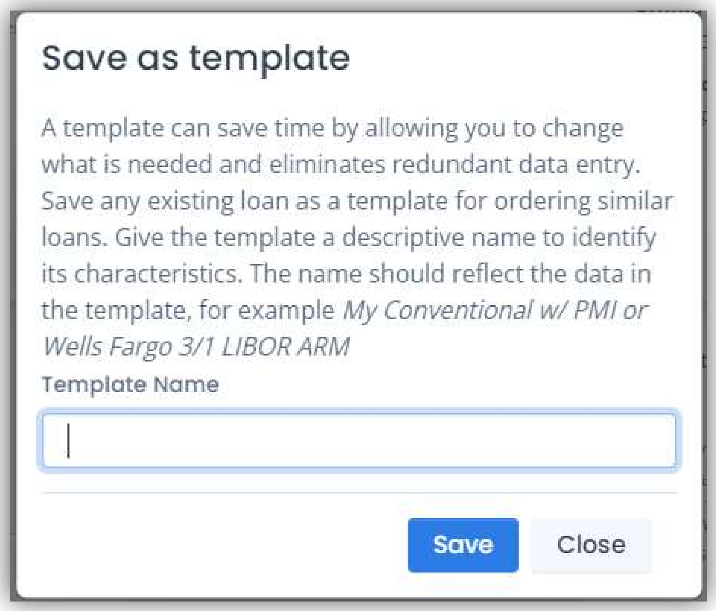
To create from an existing file -

Go to your DocPrep Orders and click on a file you would like to use as a template for future orders.

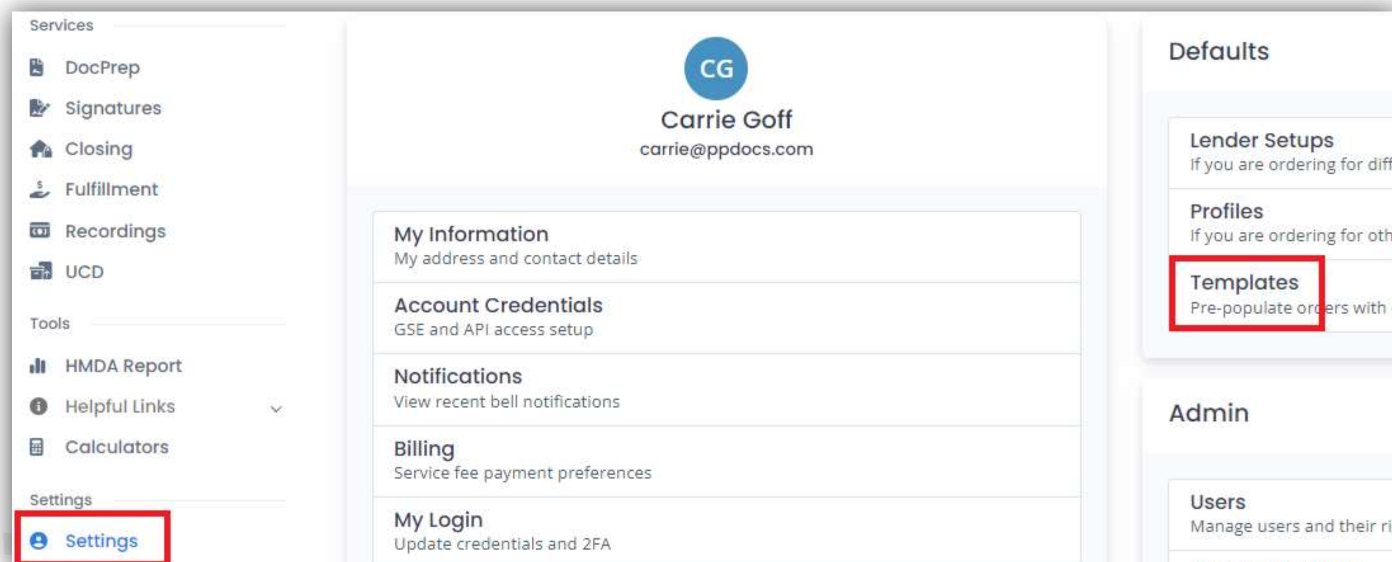
Click the three dots in the top right corner and select **Save as Template**.



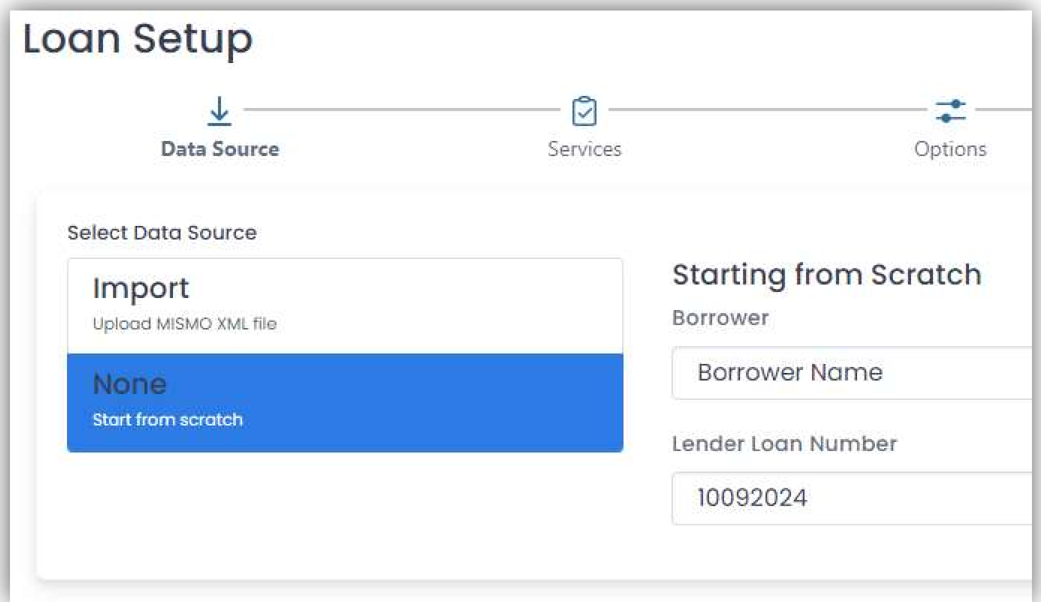
Name your template and click Save -



Your templates are stored under **Settings** on the left, then **Templates**



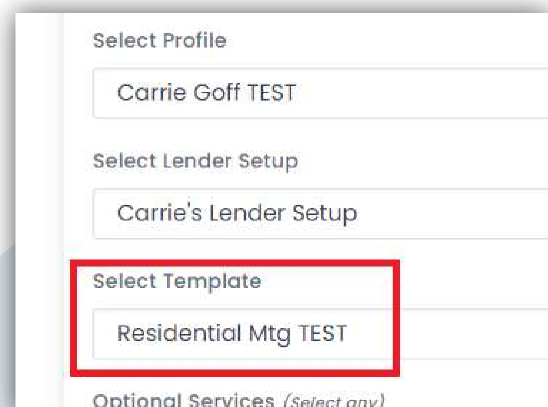
To **apply** a template, start a **New Order.** Either upload a MISMO XML file, or start from scratch-



Select your **Property State** and **Order Form** –

*Note, only templates that apply to that order form will be visible. (i.e. you will not see initial disclosure templates when a closing order form is selected, etc.)

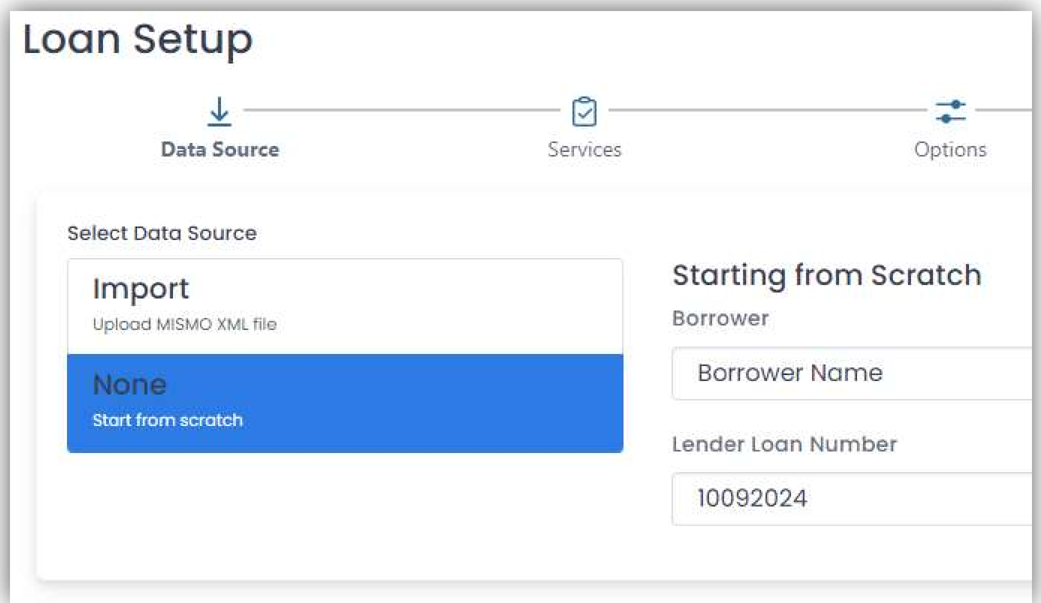
Select the appropriate **Template** –



Click **Next** to upload your support documents, then **Next** to continue to the Order Form.

**** To create a template from a blank file** -
(*note, this is handy if you only have a few fields you want to include in your order every time)

Start a **New order**



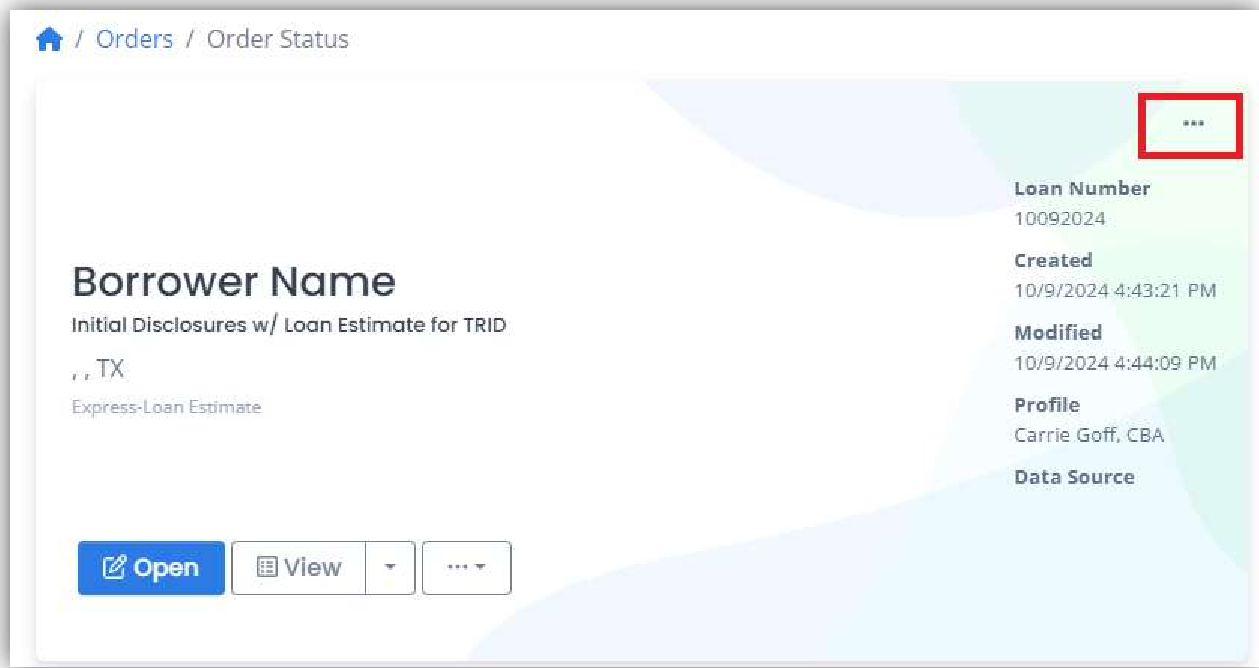
Select an **order form**. If you want an initial disclosure template, select that order form. If you want a TX Home Equity template, select that order form, etc.

Select the appropriate **Profile** and **Lender Setup**, and None for template.

Click **Next**, then **Done**.

Enter the data you would like to use in your template on every file. Click **Exit**.

Click the three dots in the right corner to save the file as a Template



Editing Templates

To **Edit** a template, go to **Settings** > **Templates**, and select the template you want to edit.

Click **Open**, make the updates, then **Exit**.