

SureClose – Re-Template a File

Re-Template a File

Re-templating is a term used for copying information such as parties, tasks and documents to a file from another template. During the process of re-templating, you can decide if you want to add parties, documents or tasks from a template, or delete tasks or documents from the file. You must have the permission rights to re-template a file.

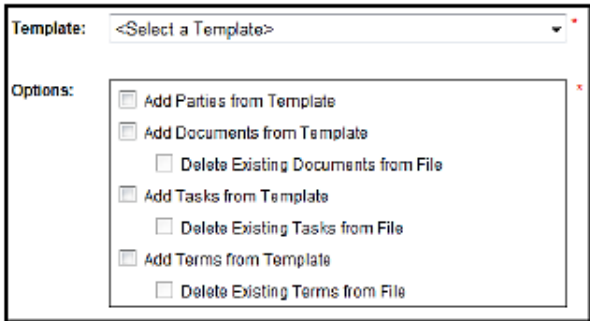
Note: A red asterisk (*) indicates a required field must be completed to continue.

Steps

1. With the file open, click Re-Template. The Re-Template page displays.



2. From the Template * list, select the template you want to work with.

A screenshot of a 'Re-Template' options window. At the top, there is a dropdown menu labeled 'Template:' with the text '<Select a Template>' and a red asterisk. Below that is a section titled 'Options:' with a red asterisk. Inside this section, there are several checkboxes: 'Add Parties from Template' (checked), 'Add Documents from Template' (checked), 'Delete Existing Documents from File' (unchecked), 'Add Tasks from Template' (checked), 'Delete Existing Tasks from File' (unchecked), 'Add Terms from Template' (checked), and 'Delete Existing Terms from File' (unchecked).

3. From the Options * window, make the following selections:
 - **Add Parties from Template**—Select this check box if you want to add parties from the selected template to the file. If not, leave cleared.
 - **Add Documents from Template**—Select this check box if you want to add documents from the selected template to the file. If not, leave cleared.
 - **Delete Existing Documents from File**—Select this check box if you want to delete existing documents from the file. If not, leave cleared.
 - **Add Tasks from Template**—Select this check box if you want to add tasks from the selected template to the file. If not, leave cleared.
 - **Delete Existing Tasks from File**—Select this check box if you want to delete existing tasks from the file. If not, leave cleared.

- **Add Terms from Template**—Select this check box if you want to add terms and charges from the template to the file. If you only select this check box, and not the **Delete Existing Terms from File** check box, then terms and charges from the selected template will not be added if a term or charge with the same description already exists on the file. This prevents duplicate entries on the file after the re-template.
 - **Delete Existing Terms from File**—Select this check box if you want to delete existing terms from the file.

Note: If **Delete Existing Documents, Tasks, or Terms** is not selected, the new items will show a date and time stamp when added and may cause confusion.

4. When finished, click Save.

Notes:
