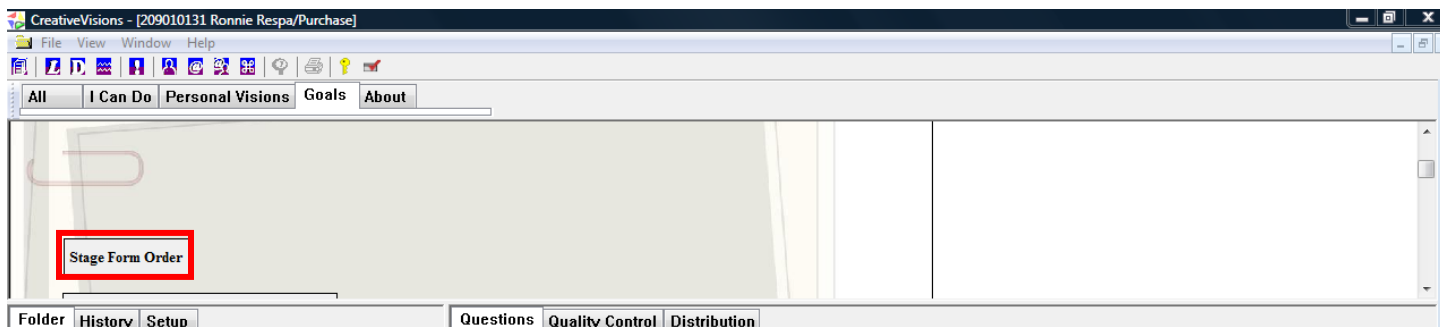


## Reordering Forms -

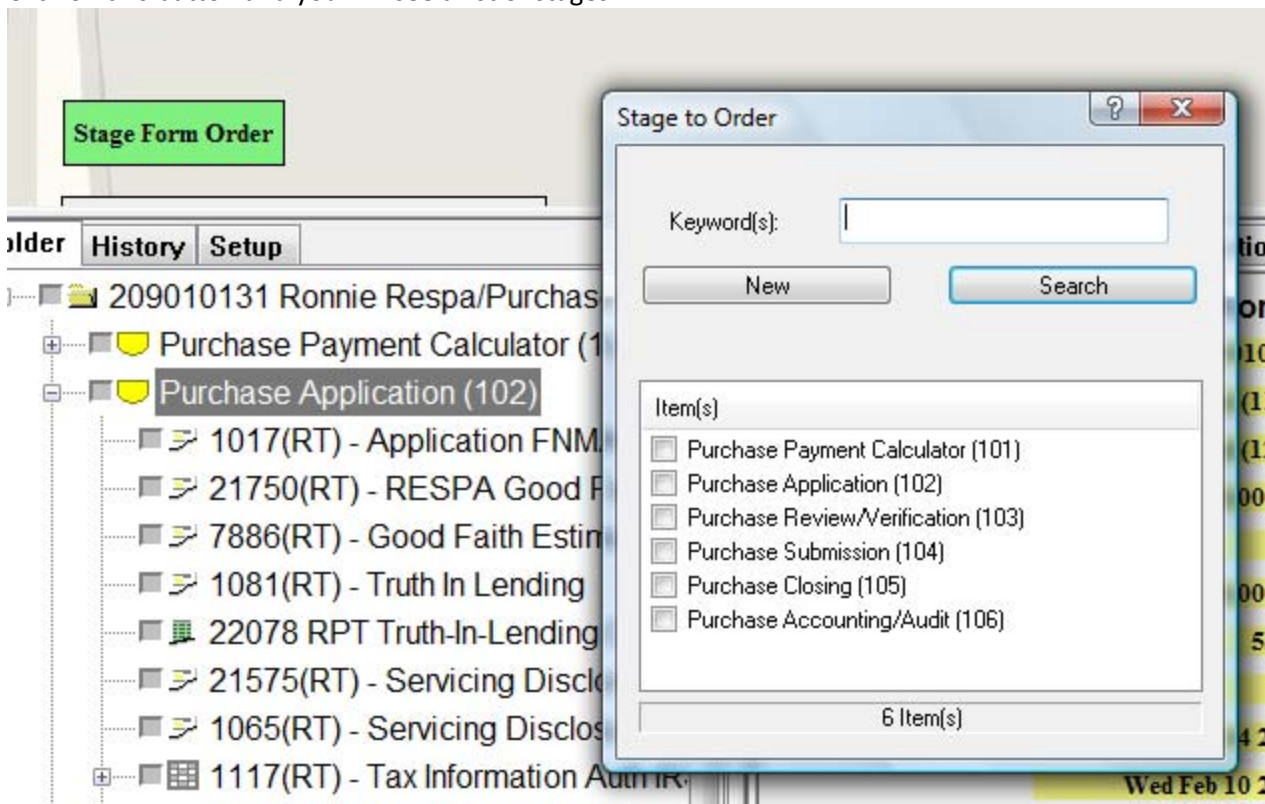


Look for the smaller scroll bar to the right of the upper Goals section.

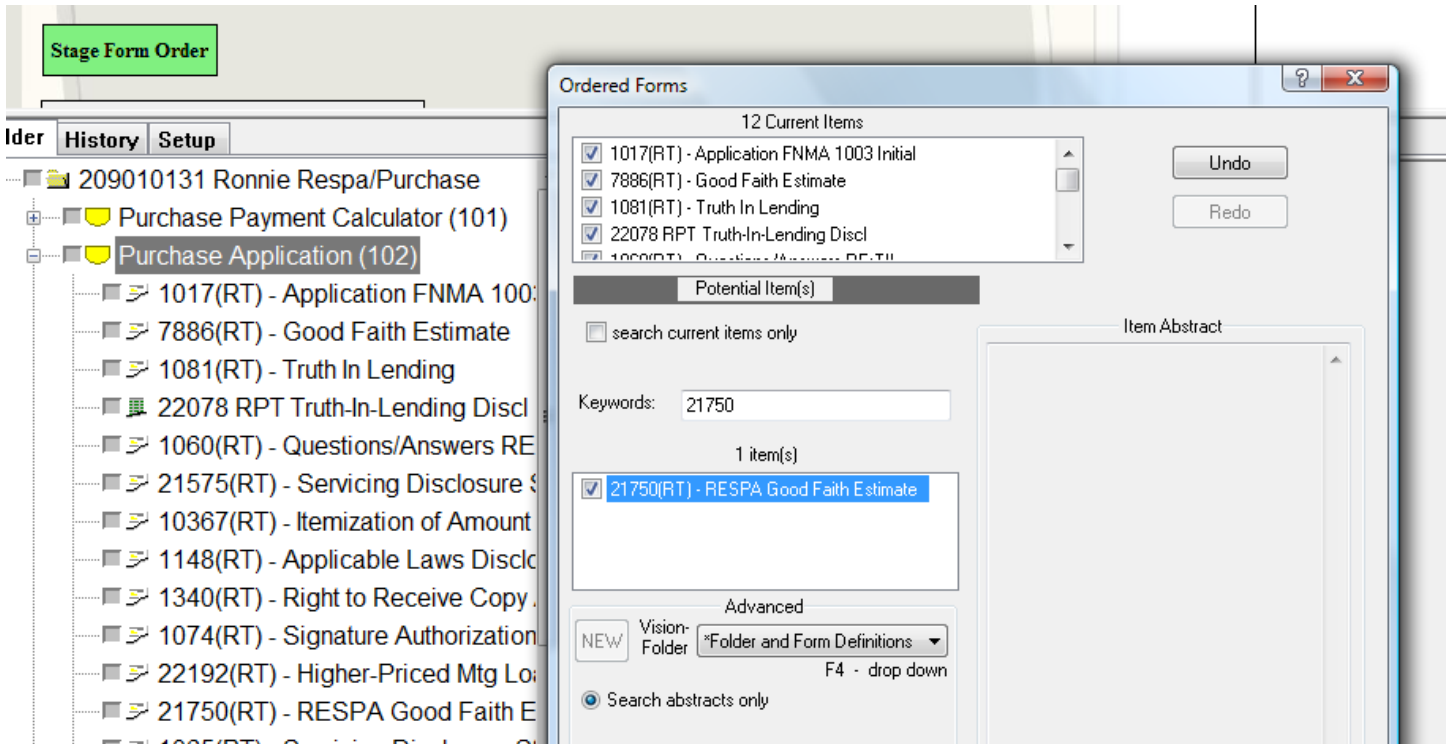


Scroll down with this bar until you see the button "Stage Form Order".

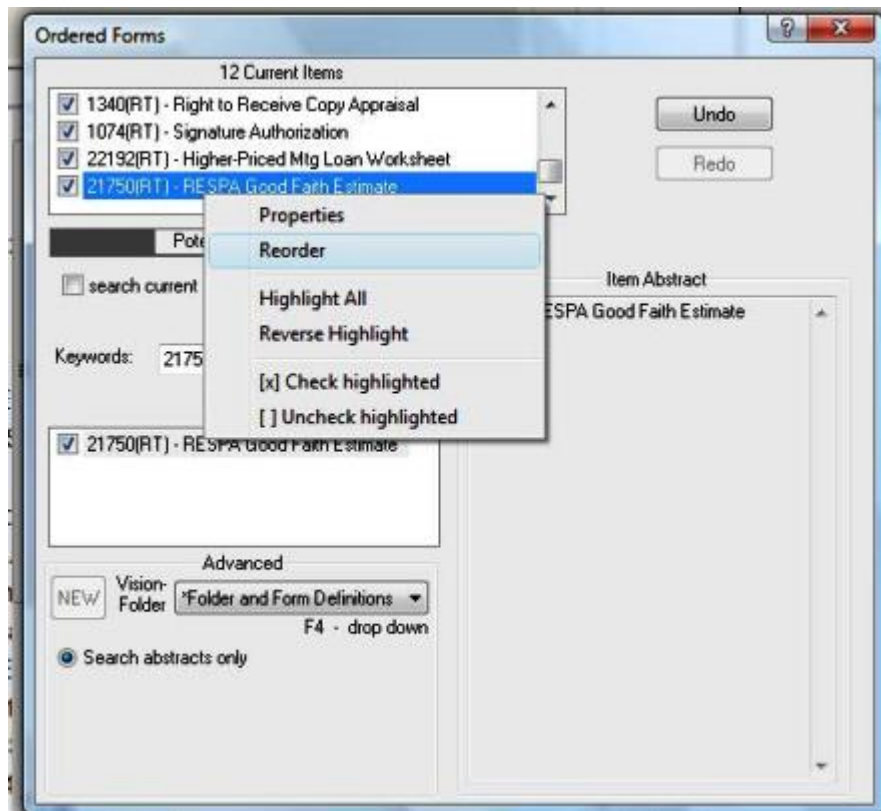
Click on this button and you will see a list of stages.



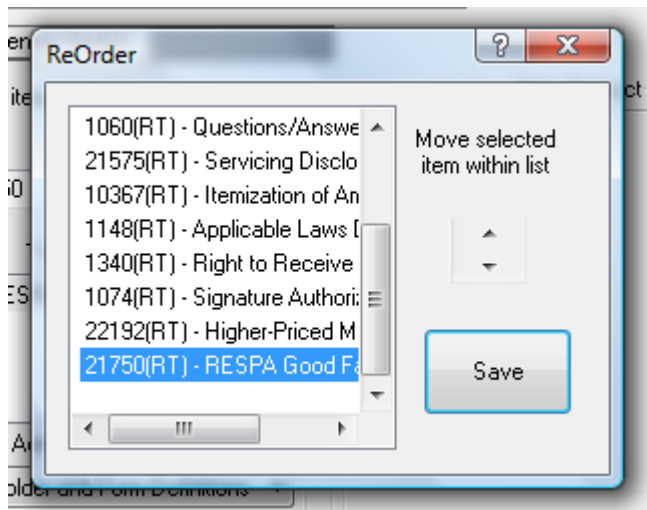
In the Stage to Order dialog, select the stage that you want to reorder by clicking the check box next to the stage(Ex: Purchase Application).



A search box will appear with forms selected in the top window. **In order to control the order of the forms the forms must first be selected; adding them to the current items list.** If you want to control the order of form 21750 you will type "21750" in the Keyword search, then place a checkmark beside this item.



Form 21750 will now appear at the bottom of the top window. Within the selected items in this window, right click and then click on "Reorder".



From the ReOrder dialog, scroll down, if necessary, and click on form 21750 (or any form that you want to move). Then use the up and down arrows at the right to move the form to its new location. **You can move any form you like, moving them one form at a time.** Click on Save when you are done.

**These steps should be completed for each Stage in each Primary Goal (“I would like to buy a home”, “I would like to refinance a home” , etc.).**

#### **Reordering Tips:**

Before you begin to reorder tasks within a stage, make sure that the bottom portion of the Goals screen is displaying the stage that you want to reorder. This way you can see the current order and task numbers while you are in the Ordered Forms dialog. You can also save your new order and see the affect of your changes before “X” out of each step.

When adding forms to the Current Items list of the Ordered Forms dialog, select the forms in the order that you want them to appear so that you won’t have to change the order after they are selected.