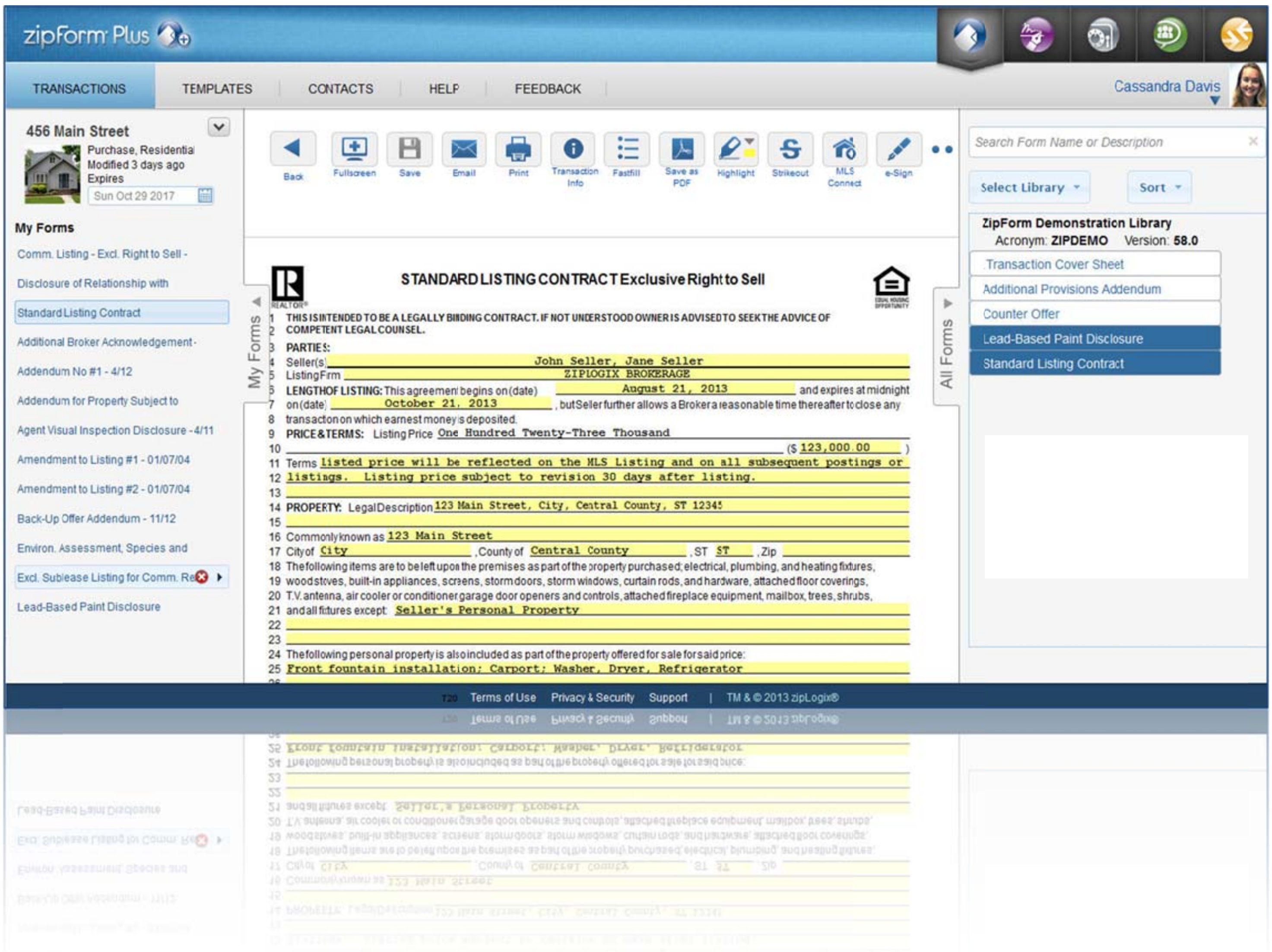
zipForm® Plus
Agent User Guide

Get online to save time and money using zipForm® Plus. zipForm® Plus helps eliminate repetitive data entry and duplicate paperwork while keeping transaction information in one secure location. Easy to use drag-and-drop features and intuitive quick tools help any user get up and running in no time, while seamless integration with document storage and paperless signatures helps agents to manage the transaction from start to finish from one location.



Completing and managing files with zipForm® Plus allows real estate professionals to work efficiently, accurately, and professionally throughout the real estate transaction process.

This guide will provide you with the tools to complete forms and work inside of transaction files using the easy and flexible HTML5 tools in zipForm® Plus.

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Welcome

Welcome to your zipForm® Plus account. Using the tools inside of zipForm® Plus, you can quickly organize transaction files for clients and properties, rapidly complete real estate transaction forms, and streamline the sales process.

zipForm® Plus works on today's computers using the latest HTML5 technology, without any special downloads or plugins, maximizing your screen use and productivity. Use your choice of operating system or browser, including Google Chrome, Apple Safari, Mozilla Firefox, or Microsoft Internet Explorer 9 and above.

Microsoft

Apple

You can sign in through any computer by visiting www.zipformplus.com, or sign in through your association or brokerage website. You can also enable the zipForm® Mobile Web Edition for access from a mobile device, such as a tablet or a smartphone. Learn more at www.zipform.com/zfmobile

When you first sign in, you will see your TRANSACTIONS page. This page can be used to create and manage your transaction files from anywhere. Transaction files can contain the forms, documents, contacts and signed contracts for a specific property and client. Information entered into one form of the transaction automatically flows to the other forms in the file, saving time and eliminating duplicate data entry.

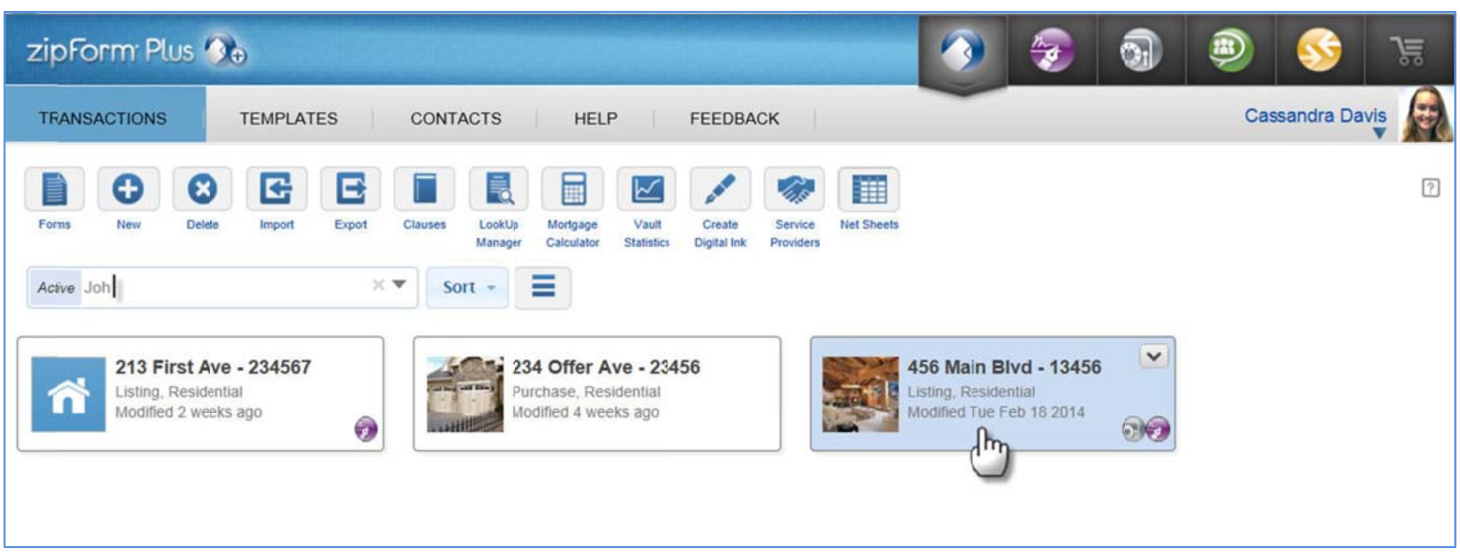


Figure 1 – Finding a file on the TRANSACTIONS page using a keyword search

The files can be searched instantly by typing in the Enter Keyword(s) search box. zipForm® Plus searches transactions by the name of the file entered under Transaction Details, and by the property address, client name(s), and agent name(s) saved in the text fields of a form inside the file.

Creating Your zipForm® Plus Account

zipForm® Plus is the Exclusive and Official Forms Software of the NATIONAL ASSOCIATION OF REALTORS®, used by agents in the United States and beyond. Local, state, brokerage and MLS forms are available across the country, with forms across the United States. With forms in 47 U.S. States, Guam, and Mexico, zipForm® Plus helps agents to work in today's market using the latest technology to streamline transaction paperwork, reduce risk in the real estate transaction, and provide top-notch service to clients around the world.

A zipForm® Plus account can contain all of the sets of forms, called forms libraries that an agent needs. Agents can have state, local, MLS and brokerage forms libraries in one convenient, secure location, and the high quality of zipForm® forms ensures that client, property, brokerage and transaction information flows accurately and instantly across all of the forms.

Individual Agents: Signing up for zipForm® Plus

If you are an individual agent, you can sign up for your zipForm® Plus account through your association website, or by visiting www.zipform.com. At www.zipform.com, you can order a new zipForm® Plus account, download the desktop version of zipForm® Plus, called zipForm® 6 Standard, or add features, such as zipForm® Mobile Web Edition for access on your phone or tablet.

When you sign up for your own zipForm® Plus account, you will be prompted to select how you would like to work and store your files. Using the online, secure cloud-based storage in zipForm® Plus with zipVault® allows you to work safely and securely from any computer with an internet connection. This means that you will always have access to your forms, contacts, and documents – the heart of your transaction.

Once you have selected the version(s) of zipForm® that you are using to access forms, you are prompted to select your libraries. Libraries can be added based upon your membership in different associations, which is determined based upon your NAR member number (NRDS number).

Brokerage Agents: Set zipForm® Password e-mail

If you are an agent within a brokerage or team account, you will receive an email with the subject line "set zipForm® password" from noreply@ziplogix.com.

The user can click the link inside the email, or copy and paste the provided link in order to set up their password for accessing zipForm® Plus at www.zipformplus.com.

To sign in, the user will use the password that they set up along with the username entered by the admin when creating the account.

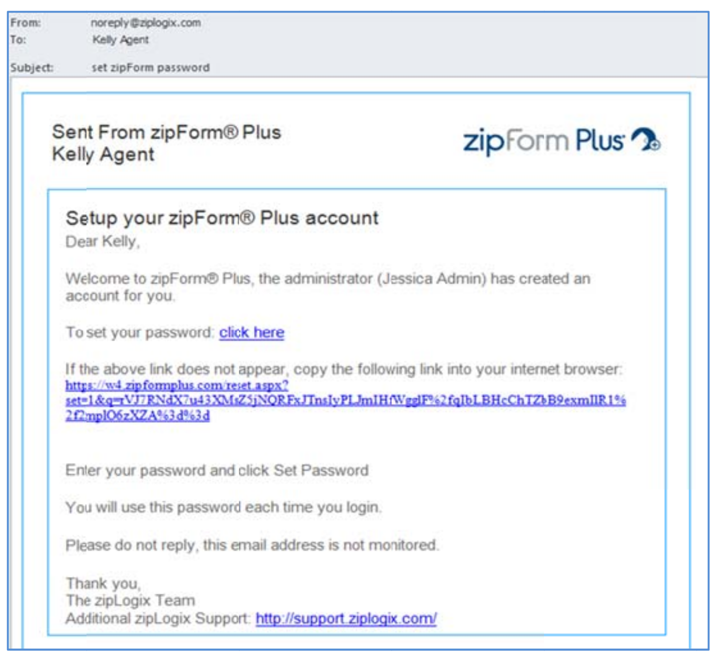
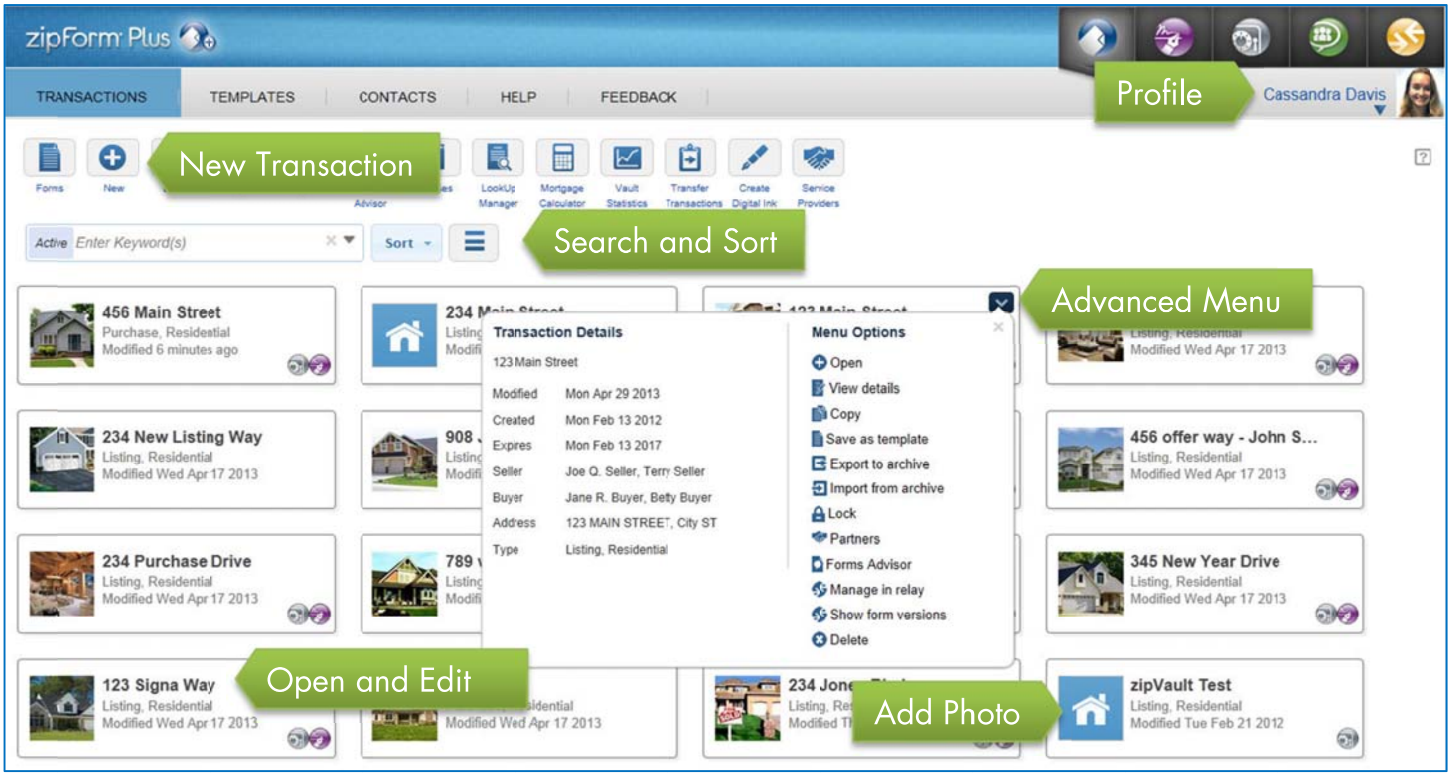


Figure 2 - Set zipForm Password email

TRANSACTIONS

The TRANSACTIONS Screen offers the ability to quickly find, start, or navigate through any transaction files. Use the quick start tools at the top to start a new transaction and jump to filling out real estate forms, or quickly find files with real-time search and personalized file views.



A zipForm® Plus transaction represents the forms, documents, and information for a specific client and property. The common information within a file flows automatically between the forms, including the property information and information about the client and other key transaction parties. With the zipForm® Plus transaction, automatic data flow and other key tools help real estate agents to save time and be more accurate in every file.

Tools can be used alongside the zipForm® Plus forms to enhance the transaction. Store documents, such as PDFs, alongside forms using the zipVault® feature, or send forms for paperless e-Signatures using direct integration with zipLogix Digital Ink® or DocuSign®.

Click on a file name open and edit the forms or documents for that property. Click the file's picture icon to add a photo of the property, or click the New button to start a new transaction (set of forms for a property or client) from scratch or from a template (saved set of required forms). The file's advanced menu provides easy access for additional tools, such as making a copy of the entire transaction.

Your zipForm® Plus profile is always accessible in the top right of the screen. It can be opened at any time to personalize zipForm® Plus by adding your picture, email signature, and customizing the company information that prints on the bottom of your forms.

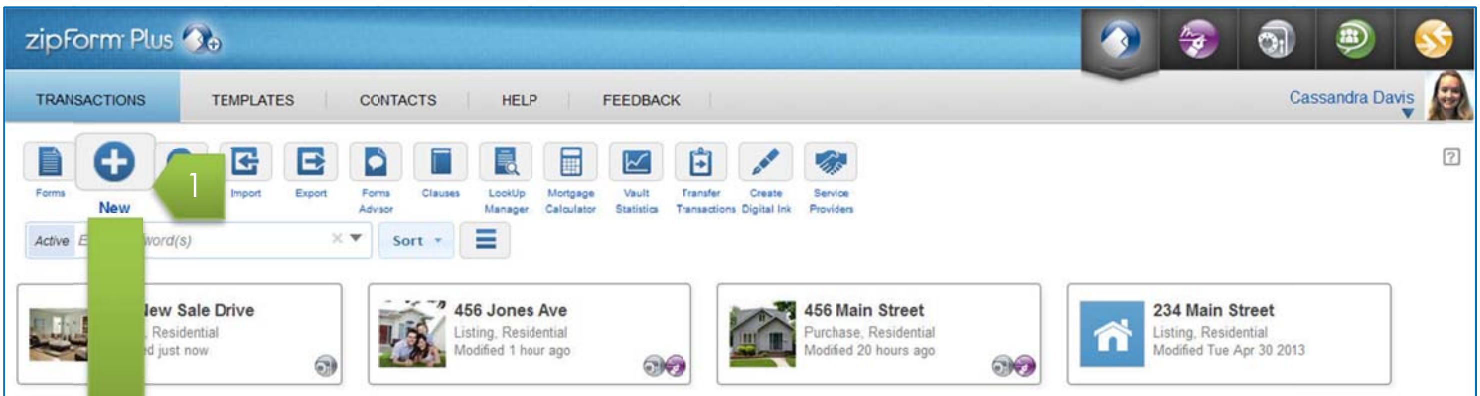
The clear, modern navigation built in to zipForm® Plus keeps essential information available at all times.

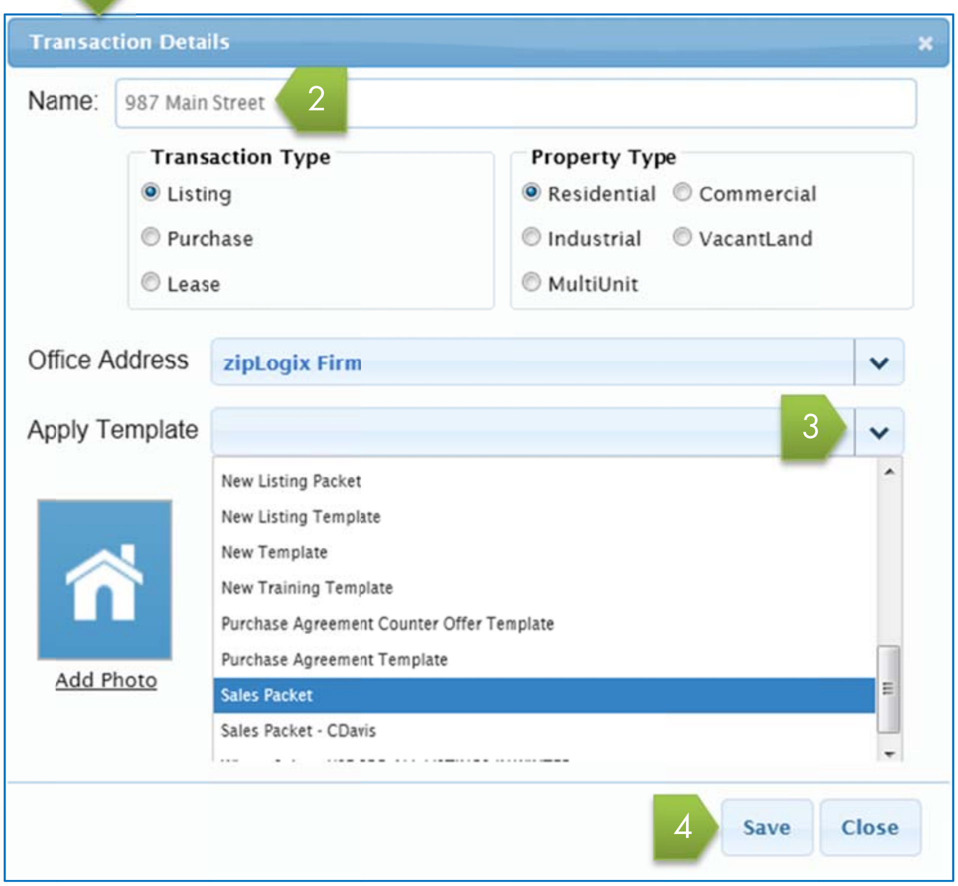
Creating a Transaction

The transaction file is a set of contracts (zipForm® forms) for a specific client or property. Transaction information, including Transaction Parties and Property Information, automatically flows from form to form as each contract is completed or updated within zipForm®. Additional tools, such as zipVault® to store documents, and zipLogix Digital Ink® to sign documents, can be used alongside the zipForm® Plus forms to create a seamless paperless transaction.

Start working in a new set of forms

Follow these easy steps to create a professional and time-saving transaction inside zipForm® Plus.





Create a Transaction

1. Click the New button on the TRANSACTIONS page
2. Enter a file name, such as the property address, for the transaction
   Tip: You can later search for files by name, address, client's name, and more using the "Enter Keyword(s)" field on your Transactions page
3. Select the appropriate template (forms packet) to start the file
   Tip: This template will add key required forms to the file. If you do not see the Templates option, you do not have any templates available. Create master templates on the TEMPLATES page.
4. Click Save

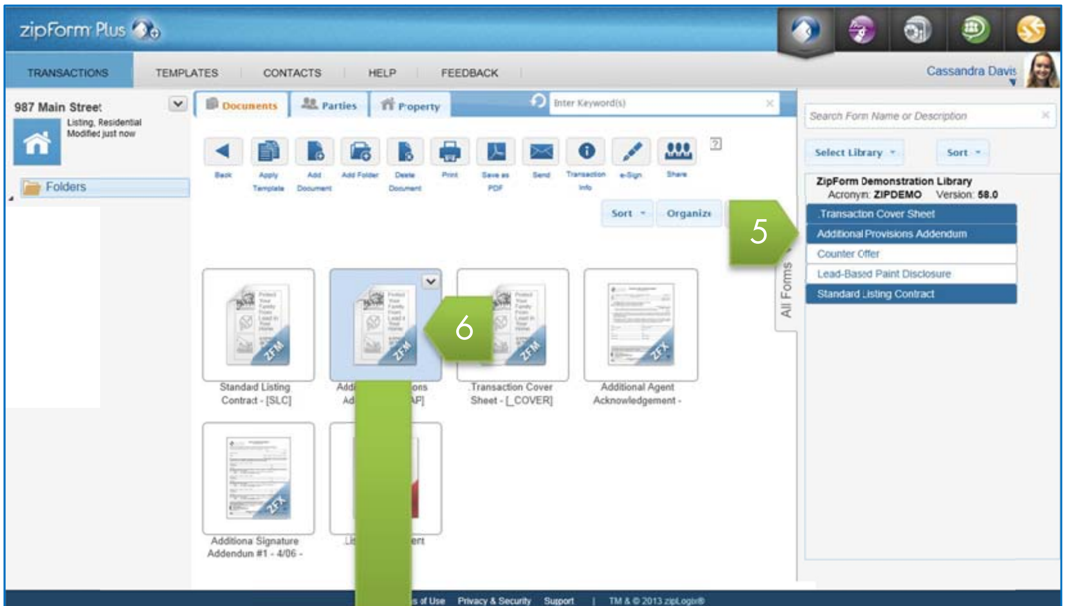
Figure 3 – Starting a new transaction

Filling out transaction forms

Transaction forms can be completed by filling out the blank fields within the form layout, or by using the **Parties** and **Property** tabs within the file. Key information inside the forms automatically flows between all of the forms in the file, including client's name and contact information, property address, and agent information.

Transaction Forms

5. Click a form in the **All Forms** tab to add it to the file.
6. Click a **form** on the Documents tab to open it and fill it out
7. **Click and type** to fill out form fields
   Tip: Key fields, including client name and property address, will automatically flow between your forms inside the file
8. Click **Save**
9. Click **Email** to email or fax contracts
10. *(Optional)* Click **e-Sign** to send for signatures using DocuSign® or zipLogix Digital Ink®



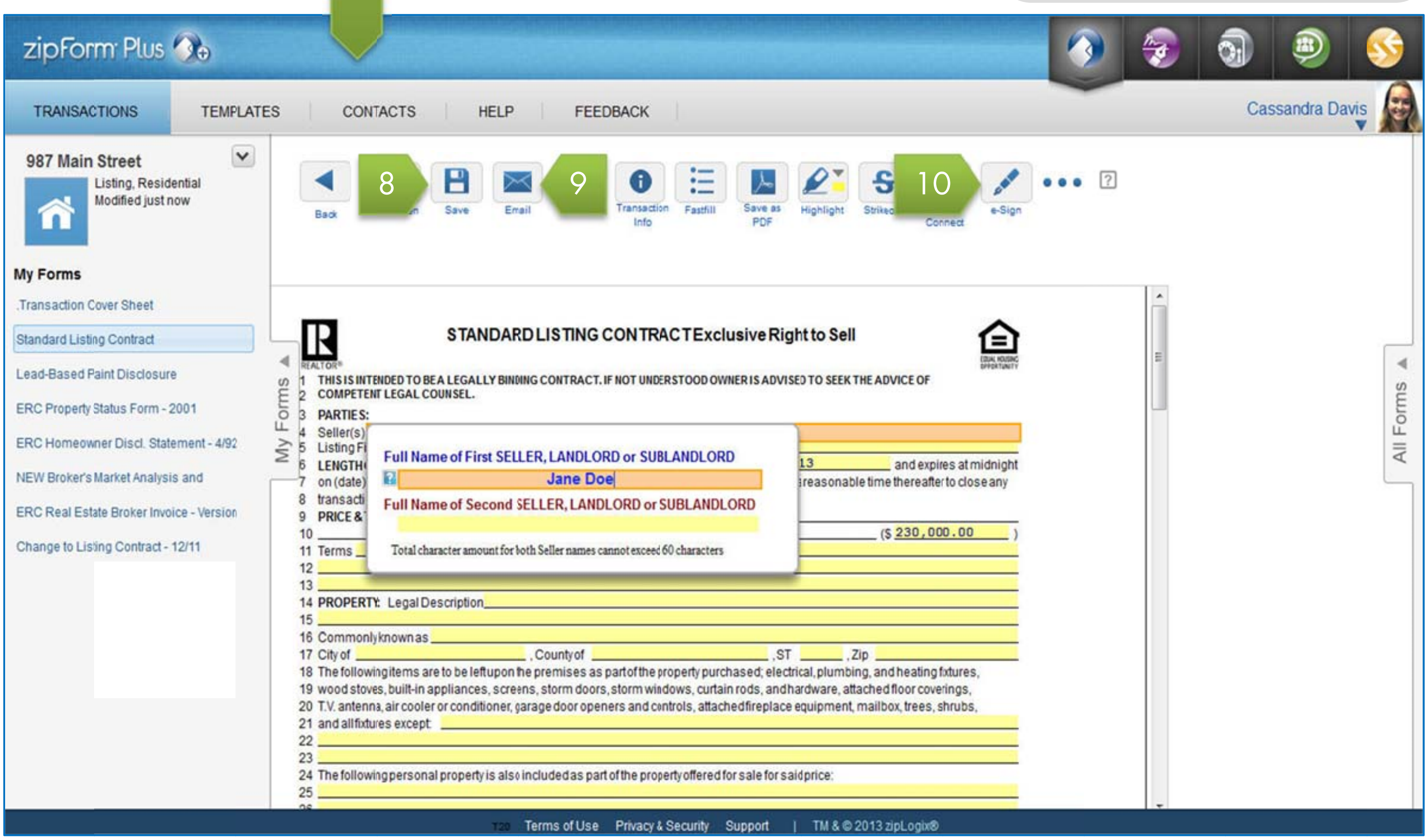


Figure 4 – Completing forms inside the zipForm® Plus file

Using a Template (previously saved packet of forms)

A template is a saved packet of forms created by the agent, broker, or office administrator using the TEMPLATES page (*see TEMPLATES, page 13*). Templates are best used from the TRANSACTIONS area of zipForm® Plus. Templates can contain standard forms, and may be partially filled out with common text specific to that type of transaction (such as brokerage information for the side you represent). Users with zipVault® can also have outside documents (such as Word docs or PDFs) and folders for organizing documents automatically added to the file.

Use templates to save time within a transaction by applying the template to the transaction file. This can be done when starting the transaction or it can be done at any time during the transaction.

Apply a template to a new transaction

One of the easiest ways to use a template is to apply a template when starting a new transaction file (*see also Creating a Transaction, page 6*). This starts the transaction file with all of the required forms, including saved text that is appropriate for the type of file, such as your brokerage information.

1. Start a new transaction file by clicking the New button on the TRANSACTIONS page
2. Name the transaction
3. Use the Apply Template drop-down to select a template
4. Click Save

The new transaction will be created using the forms from within the selected template. It will also contain the template's saved text and documents (if using zipVault®).

More than one template can be used in a transaction, but only one can be selected at a time.

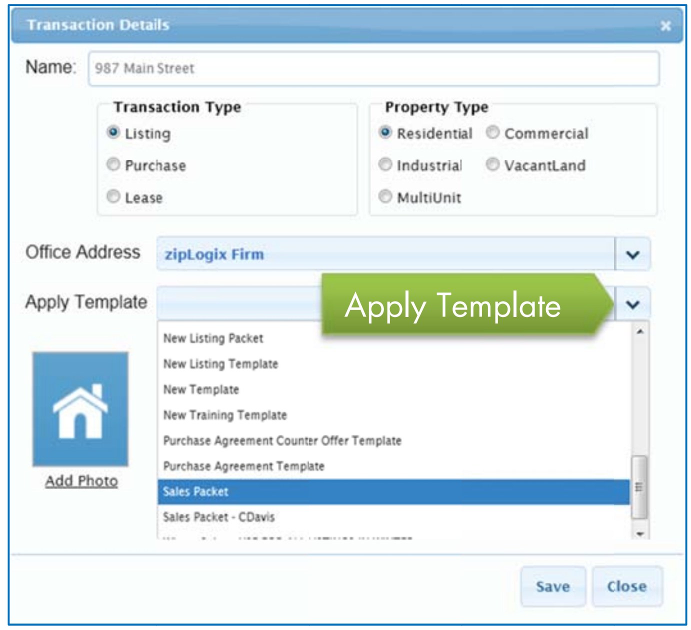


Figure 5 – Select a template for a new transaction

Apply a template to an existing transaction

The Apply Template quick edit tool can be used at any time from a transaction file's Documents tab.

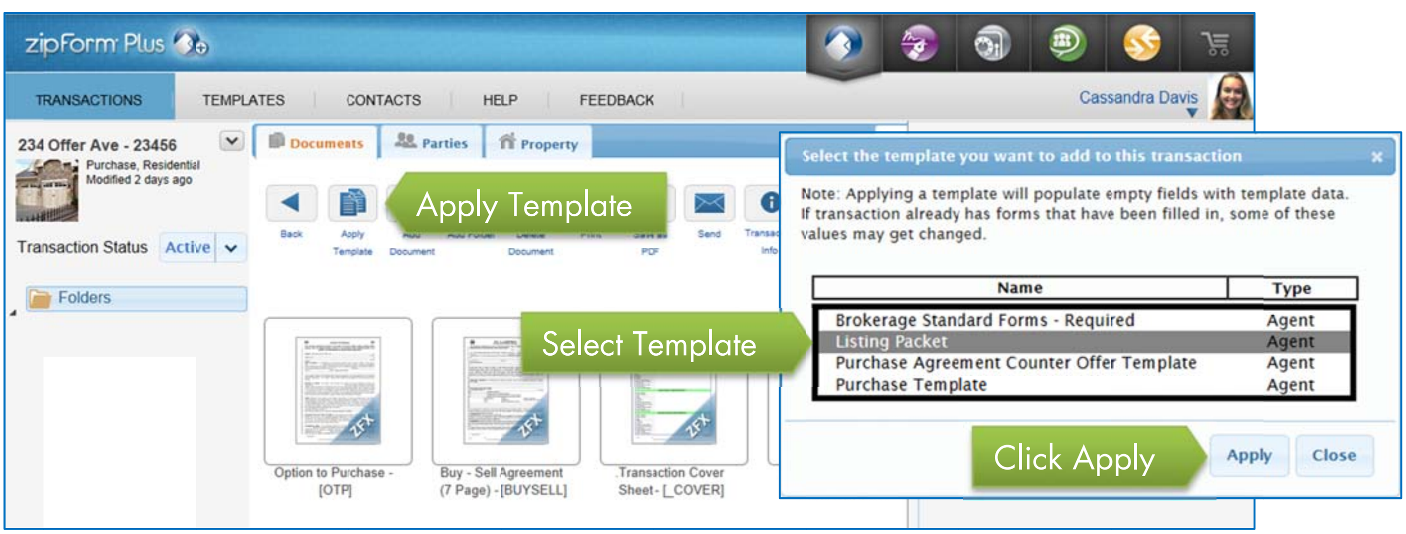
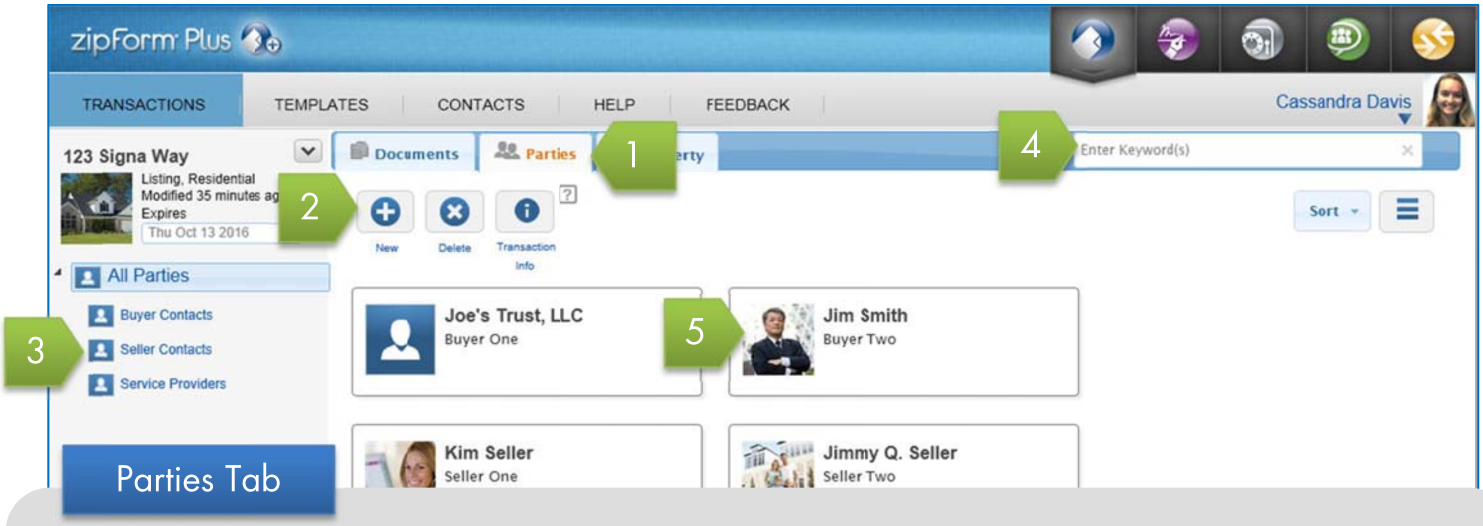


Figure 6 – Apply a template to an existing transaction

Parties Tab

File input and organization are streamlined through the **Parties** and **Property** tabs within the file. Enter file information on these tabs and watch it flow directly through transaction forms. The



Click the **Parties tab (1)** inside the zipForm® Plus transaction in order to update contact information for parties (transaction participants) in the forms and the transaction file.

Click the **New button (2)** to add a party by completing contact information, import from a saved vCard file, or add a saved contact from your zipForm® CONTACTS page. Information entered or updated using the Parties tab is filled ou or updated in the forms for this transaction, and can be used when sending via email, fax, or e-Sign. Likewise, information entered on the form updates the Parties tab.

Click on a **category (3)** to easily sort contacts, or **Enter Keyword(s) (4)** to search through the transaction parties. Click the contact name or **picture (5)** to edit contact information, add a picture, or save this contact to your zipForm® CONTACTS page for use in future transactions.

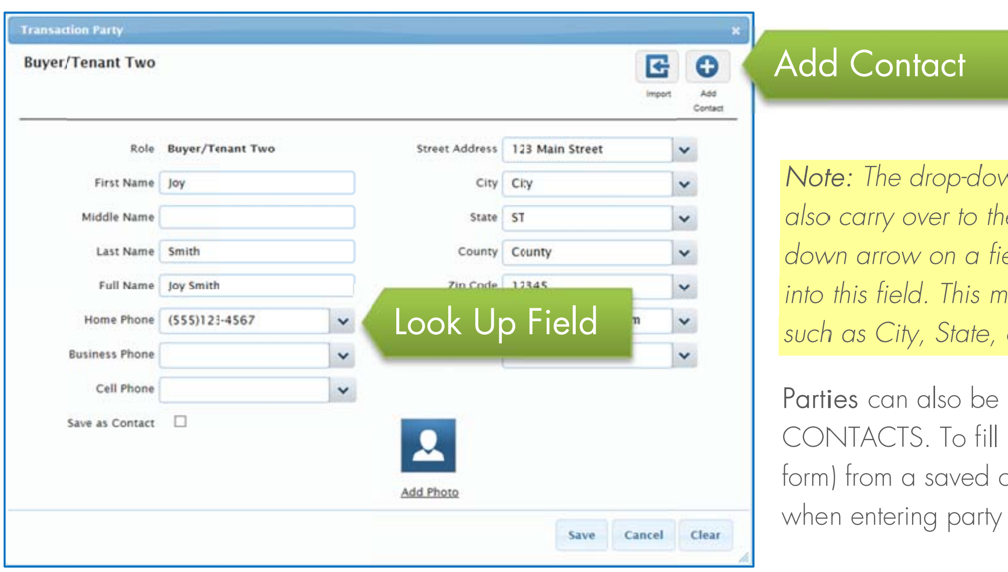


Figure 7 – Add Parties to the transaction

Note: The drop-down **look up fields** *from your forms will also carry over to the Parties and Property tabs. Click the down arrow on a field to enter previously typed information into this field. This makes it easy to complete common fields, such as City, State, or Zip Code.*

Parties can also be added from your zipForm® Plus CONTACTS. To fill in party information (and fill out your form) from a saved contact, use the **Add Contact** button when entering party information.

Property Tab

Complete key form information quickly and without distractions using the property tab, which complements the already popular Transaction Coversheet form and Transaction Info form filling shortcuts. The Property tab offers a central location to reference and update all of the property information for the zipForm® file, or quickly import MLS listing data using zipFormMLS-Connect® (*see Import* listing data to the forms with zipFormMLS-Connect®, *page 11*)

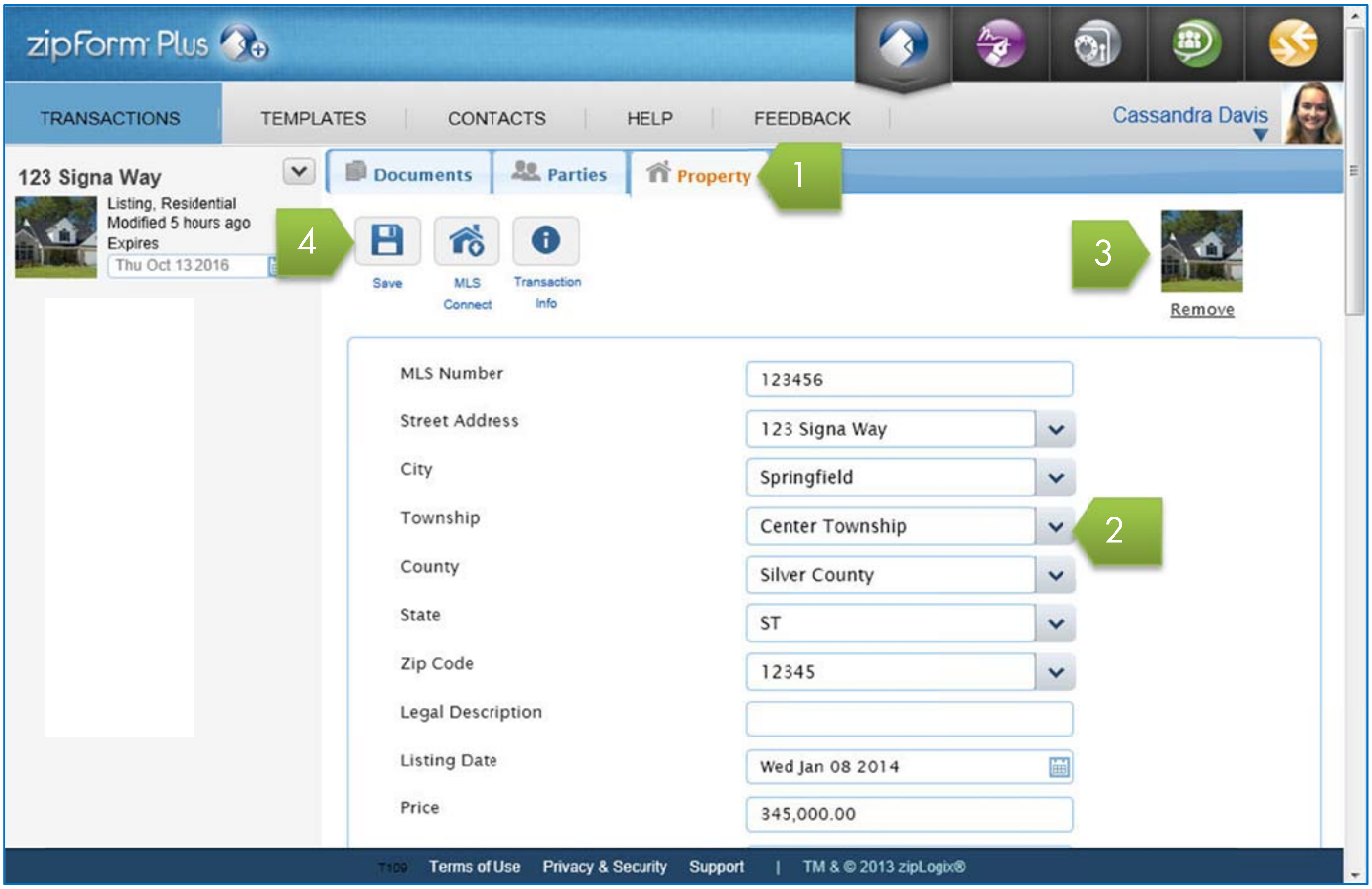


Figure 8 – The zipForm® Plus transaction file Property tab

Property Tab

Click the Property tab (1) inside the zipForm® Plus transaction in order to update or reference property information entered in the forms and the transaction file.

Click and type to fill in property information, or use the Look Up field arrow (2) to look up information previously typed in this field for this transaction or other transactions in zipForm® Plus.

Click on the property picture (3) to change the photo representing this property, and click Save (4) to save all changes to this file.

Where available, the MLS Connect button can be used to import MLS information into the property fields.

Import listing data to the forms with zipFormMLS-Connect®

Import MLS Listing information directly into your zipForm® Plus contracts.

The zipFormMLS-Connect® button can be used after opening a form in zipForm® Plus, or it can be used from the Property tab (*see Property Tab, page 10*). Use zipFormMLS-Connect® to instantly import listing data to the forms from a participating MLS.

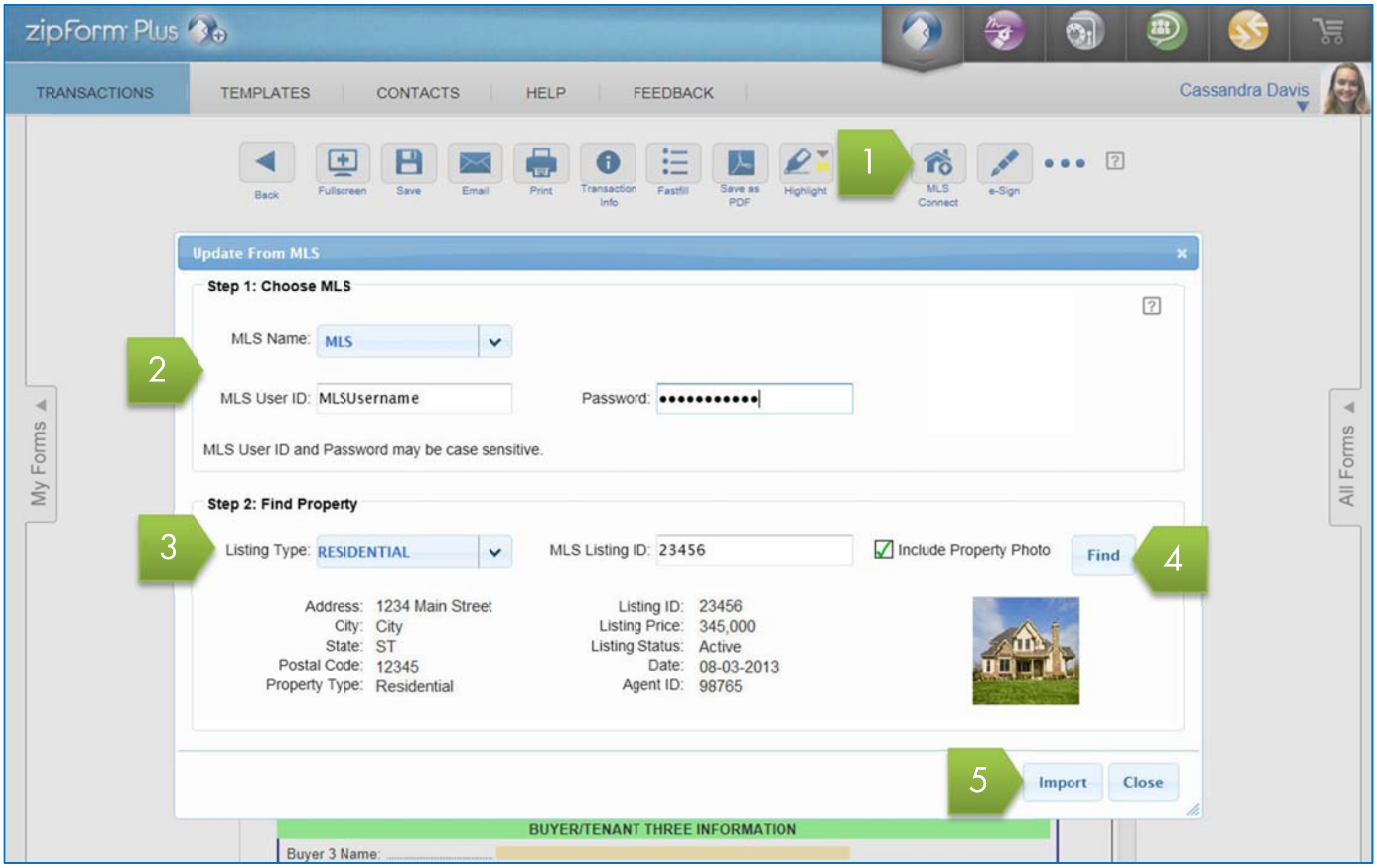


Figure 9 – Using zipFormMLS-Connect® in zipForm® Plus

Import from the MLS

1. Click the MLS-Connect button
2. Select the MLS Name and enter the MLS User ID and Password, if required.
3. Select the Listing Type and enter the MLS Listing ID, and check the box to include the property photo if it is available.
4. Click Find to search for this listing on the MLS.
5. Confirm the MLS listing information is correct and click Import.

Note: Adding the Cover_Sheet form in the zipForm® Plus file ensures that all of the possible information from the MLS is saved into the forms.

zipFormMLS-Connect® can also be used from zipForm® Plus, zipForm® Standard (located under the Tools tab), and zipForm® Mobile Web Edition (located within the More menu).

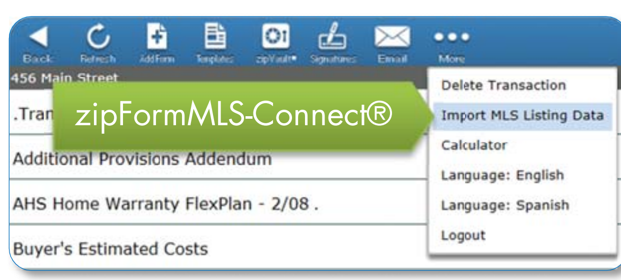
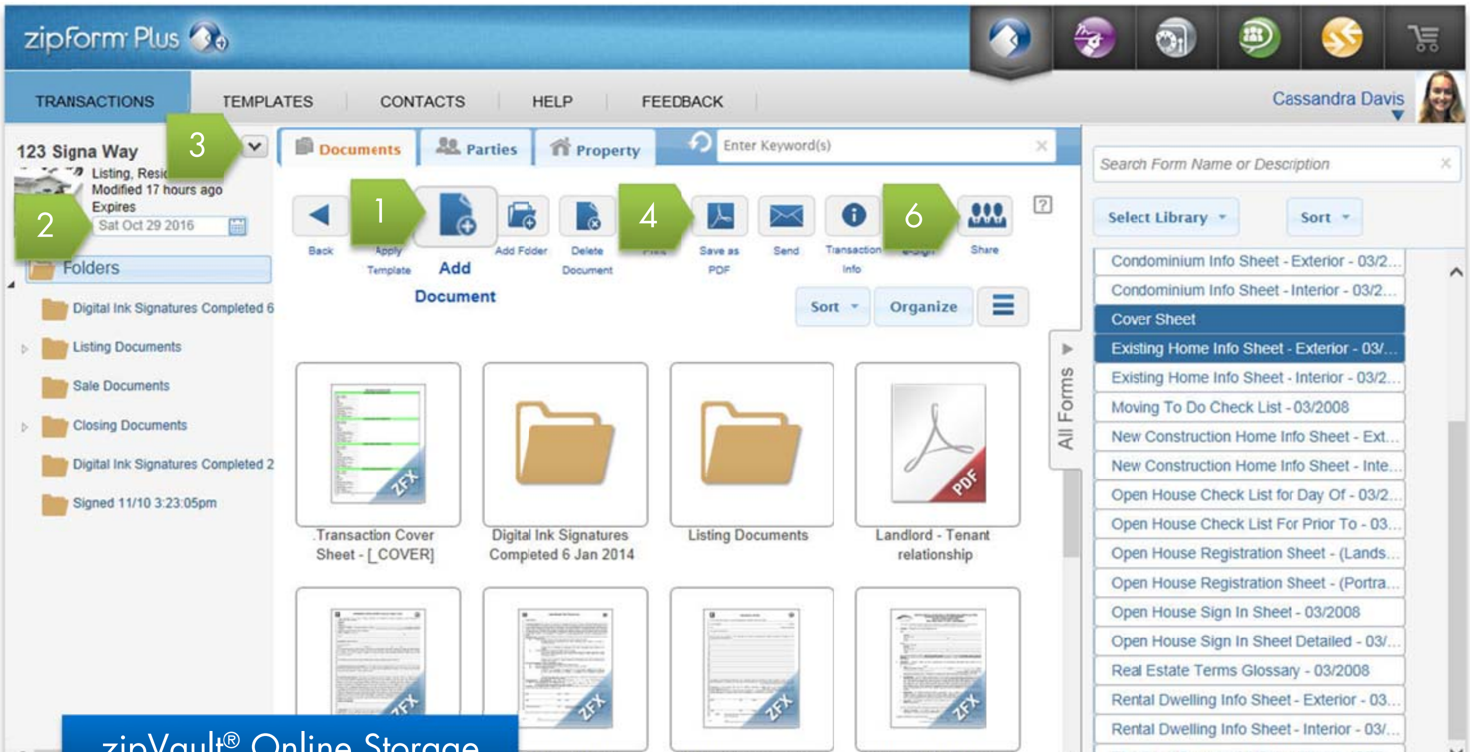


Figure 10 - zipFormMLS-Connect® on a mobile device

Add documents and folders using zipVault®

zipVault® makes it easy to store documents and files securely online within your zipForm® Plus account. With document storage and online file retention built seamlessly into zipForm® Plus, using zipVault® means saving time and money. Adding a document to zipVault® activates extended storage for the file, with an expiration date that can be controlled, so agents and brokerages can easily and securely store files online.



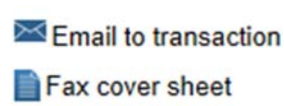
zipVault® Online Storage

Click Add Document (1) to upload a file from your computer. As soon as the first document is added, the zipVault® extended file storage is activated for the transaction. The transaction will be available on zipForm® Plus until it is deleted manually by you, or until the Expiration Date (2) (whichever comes first). Click the calendar button next to the expiration date to choose a different date.

Documents can also be added to the file by using the Email to zipForm® or Fax Coversheet features on the advanced File Menu (3). Unsigned forms can be preserved as part of the file for sharing or documentation using the Save as PDF (4) button, and saving selected forms to the file. Signed forms sent using the e-Sign button with DocuSign® or zipLogix Digital Ink®, or signed on a tablet with TouchSign®, are added automatically to a new Signed Folder (5), once signing is completed by all parties.

Documents stored online can be emailed, faxed, or included in e-Sign packets alongside forms. Documents can also be shared online using the Share (6) button. Use Share to send a link to view documents to anyone with an email address. It is a great way to share documents without worrying about email attachment size.

Send documents in to zipVault®, or ask someone else to send you documents. Documents can be emailed to a transaction as email attachments using Email to transaction, or can be faxed from any fax machine by following the faxing instructions on the Fax cover sheet. Both options can be found under the advanced File Menu (3).



TEMPLATES

Templates are time saving tools that you can use to create transactions quickly with commonly used forms and information. A template is a group of forms that you frequently use for your transactions. This packet of forms can have non-specific transaction data stored within the template, such as the brokerage name and address, to make it easier to start a new transaction.

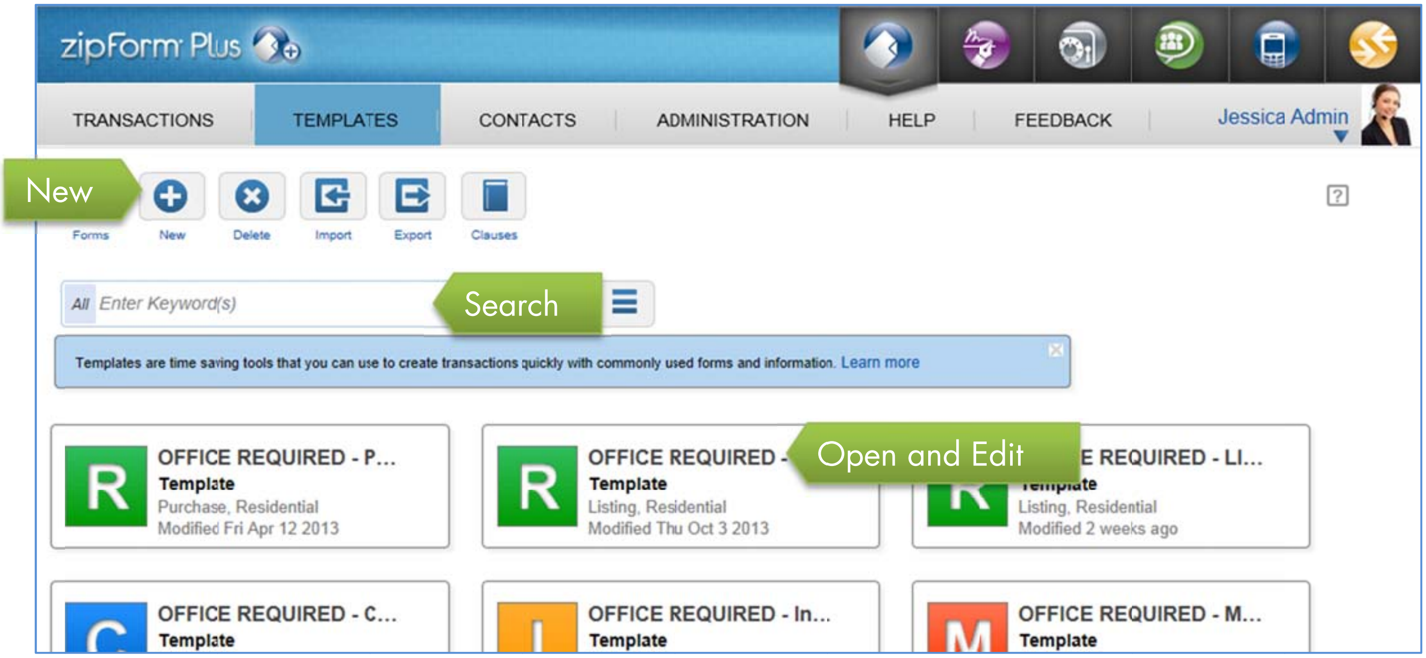


Figure 11 - Templates page

Templates are color-coded according to the property type. A template can be for Residential, Commercial, Industrial, Multiunit, or Vacant Land. Click a template name to open and edit that template.

Note: When you use a template (apply it to a transaction), the most recently released and up-to-date versions of forms will be applied. However, when you open a template, you will see the form version that was originally used. This allows you to review the old form, along with any text entered in the old form, before replacing it with a new form. To replace a form, delete the form and then re-add it to the template or transaction. The newest version will always be added when you add a new form.

Adding Templates

Creating a template creates a foundation for future transactions. Creating a template is very similar to starting a transaction.

Once you have created a template, the template can be used either to start a transaction using the template or it can be applied to an existing transactions.

You can create as many templates as you need. In a brokerage account, templates can be saved for personal use (Agent templates), Office use (Location templates), or Brokerage-wide use (Global templates).

Click the New button on the TEMPLATES page to create a template.

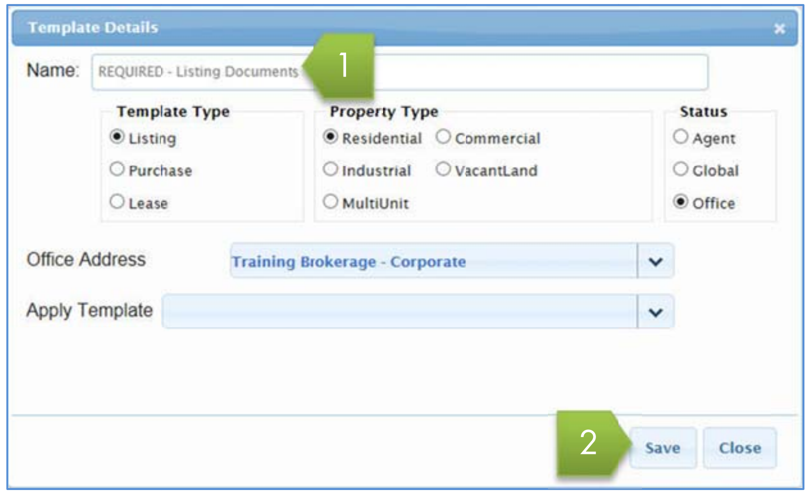


Figure 12 – Template Details

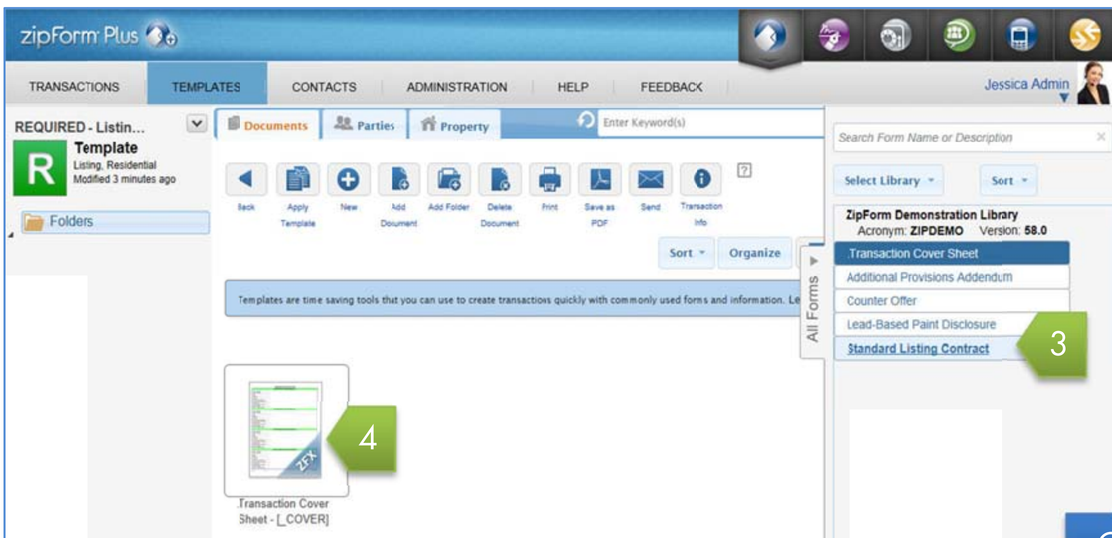


Figure 13 – Adding forms to a template

Tip: Templates are traditionally used for forms, but with the zipVault® feature, you can also add folders (for organization), and outside documents. Outside documents are not editable. If you would like editable forms in a custom brokerage library, please contact zipLogix® sales at: 866-627-4729

Create a Template

1. Name the template
2. Click Save
3. Click to add Forms from the All Forms tab

   (zipVault® only: add documents and folders for the template)
4. Click once on a form to open and fill out that form
5. Enter text that you would like on each file that uses this template
6. Click Save

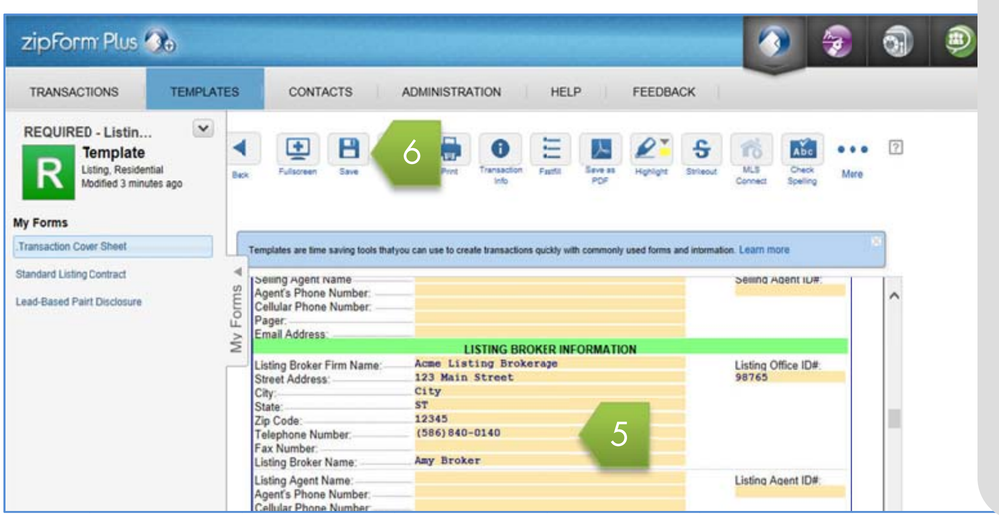


Figure 14 – Entering text for a template

CONTACTS

The zipForm® Plus Address Book is labeled CONTACTS. Names and contact information for use when completing or sending forms can be saved under the CONTACTS page in zipForm® Plus. Using the Import and Export buttons, contacts can be imported from a CSV or VCard file that has been downloaded from another contacts management system, such as Outlook® or Gmail®. The contacts can also be exported as CSV or VCard files for use in other systems.

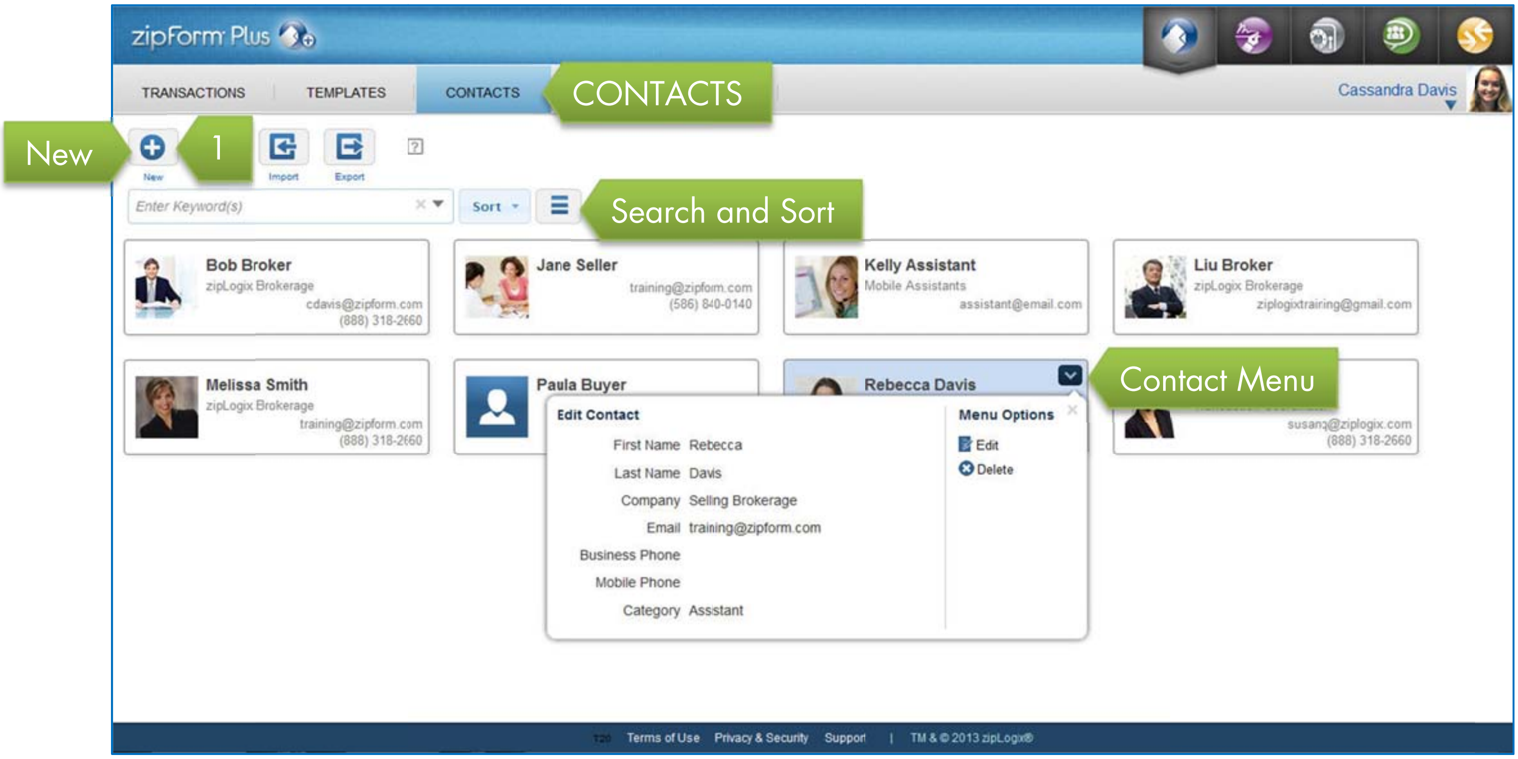


Figure 15 - the zipForm® Plus CONTACTS page

Click New to add a contact to your CONTACTS in zipForm® Plus. Contacts can be grouped by categories.

Add a Contact

1) Click New in the CONTACTS page
2) Select the contact category, or click and type to create a new category
3) Click and type to enter the contact's name and other contact information
4) Click Add Photo to add a photo from your computer of the contact
5) *(Optional)* Click Import Contact to import some or all information from a vCard file
6) Click Save

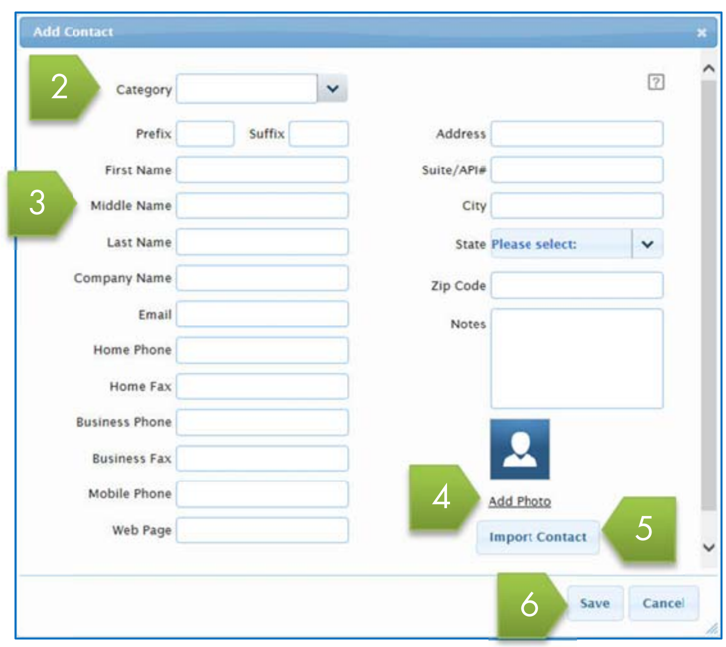


Figure 16 – Add new contact

FEEDBACK

zipForm® Plus is the Exclusive and Official Forms Software of the NATIONAL ASSOCIATION OF REALTORS®, so your feedback as an agent and member of the NATIONAL ASSOCIATION OF REALTORS® is important to shaping the tools that help you go beyond transactions and be more productive every day.

The FEEDBACK page is one way for you to voice your needs as an agent. If you have a suggestion, idea, or issue you would like us to investigate further, enter your feedback by clicking the FEEDBACK option and entering your comments.

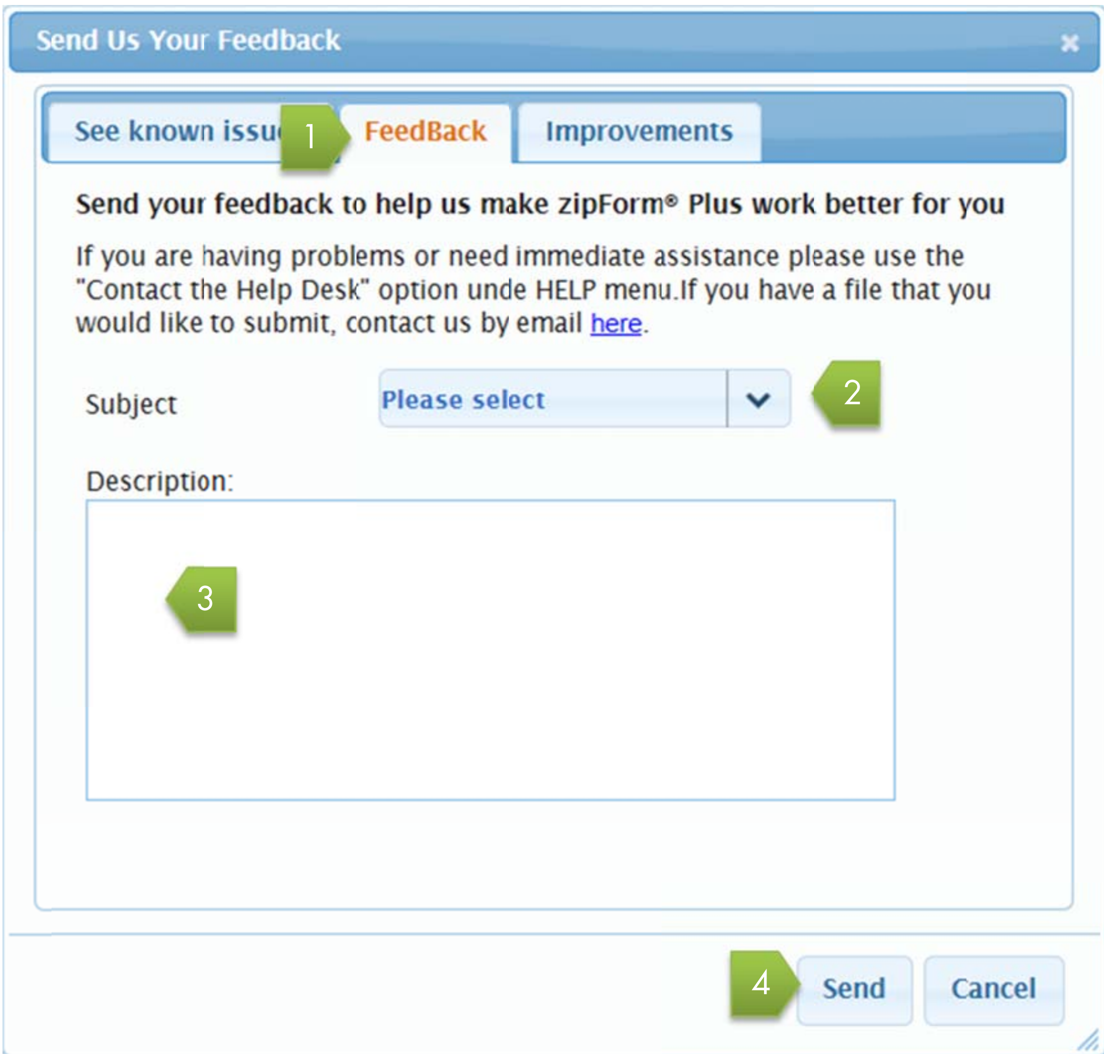


Figure 17 – Send feedback on zipForm® Plus to zipLogix®

The feedback page also provides a tab where you are able to view feedback provided by other agents, listed under the **See known issues** tab, and the latest improvements released to zipForm® Plus, under the **Improvements** tab.

To send us your feedback, select a **Subject**, enter a **Description** of what you would like to see, and click **Send** to send your feedback to our development team.

User feedback is evaluated through the zipLogix® User Group and product development channels to ensure that features are easy, user-friendly, and provide the best possible resources for you, the real estate professional.

Clauses

Clauses are saved text, including legal and brokerage language, which can be inserted into the forms at any time. Clauses are especially helpful in areas with lengthy text fields which the agents will complete, or anywhere that the broker would like to provide standardized text for the agents to insert into the text fields of forms. Clauses work best within multi-line fields.

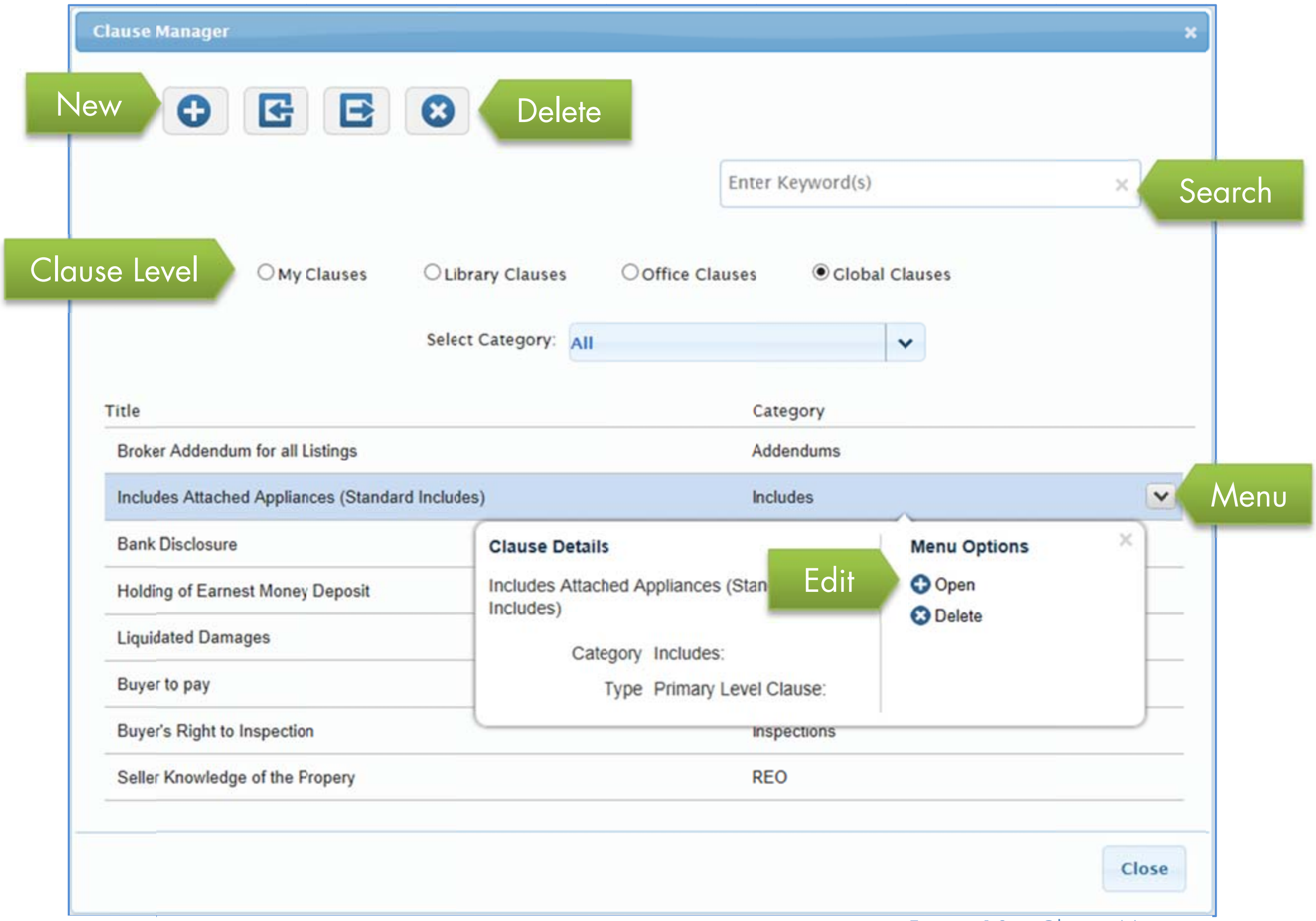


Figure 18 – Clause Manager

Clauses can be general legal or brokerage information, or they can be specific to a specific type of home sale, different types of land you might work with, or to a service provider that you work with on a regular basis. They can be used from within the forms as you are filling them out, and can be accessed at any time. Once inserted into a form field, the clause can be edited, just like any other text on the form, without affecting the saved text in the clause manager that will be used on future transactions.

Use the Clause Manager to edit and update clauses, as needed. Editing the clause in the clause manager will not change what has already been entered in your forms. It will only change the clause text that is applied to future contracts. To open the Clause Manager, click the Clauses button on the TRANSACTIONS page or the TEMPLATES page.

Note: Right-click in the clause text area, or use keyboard shortcuts to insert clause text into the Clause Manager from other sources by copying and pasting text. On a Windows® computer, CTRL + C will copy selected text, and CTRL + V will paste the text. On an Apple computer, use ⌘ (command) + C to copy selected text and ⌘ (command) + V to paste text.

Creating and Managing Clauses Using the Clause Editor

A clause is a saved sentence, phrase, or paragraph that will help you to fill out your forms. Agent clauses can be created at any time from the Clause Manager, which can be opened by clicking the Clauses button located on the TRANSACTIONS page.

In the Clause Editor you can add and manage clauses by clicking the New button.

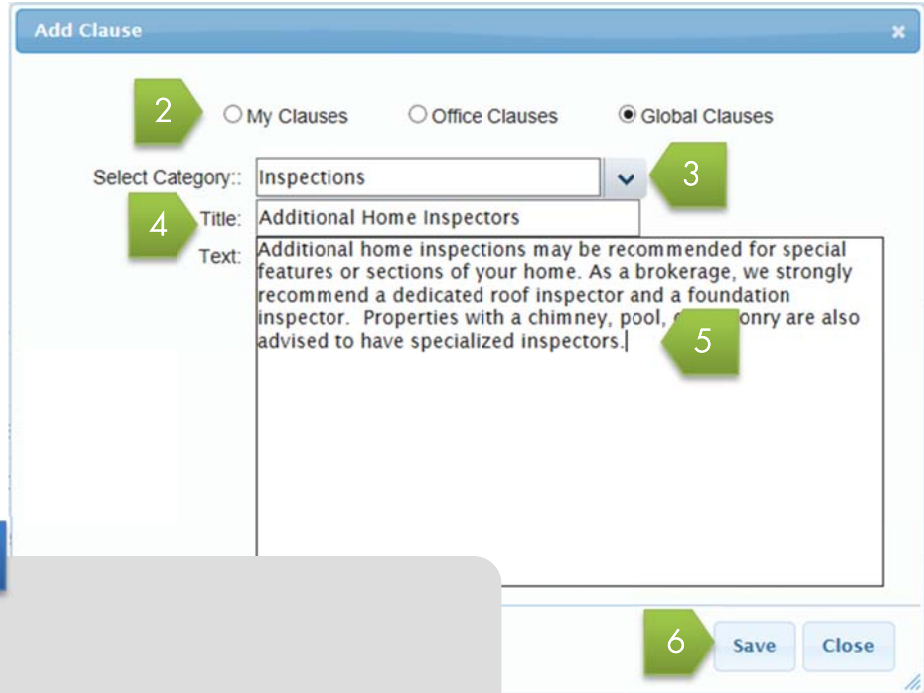


Figure 19 – Adding a new clause

Add a Clause

1) Click New in the Clause Editor
2) Select the clause level
3) Select the clause category, or click and type to create a new category
4) Click and type to title the clause.
5) Click and type to enter the clause text, or paste text from another location
6) Click Save

Using Clauses

Clauses can be inserted into the text field of a form, saving time, reducing errors, and making text entry easier for multi-line fields.

Click on a field and the gray pencil button will appear. This pencil button gives you access to text field tools, including the Insert Clause button, and the change text case options. Click the pencil to access these tools.

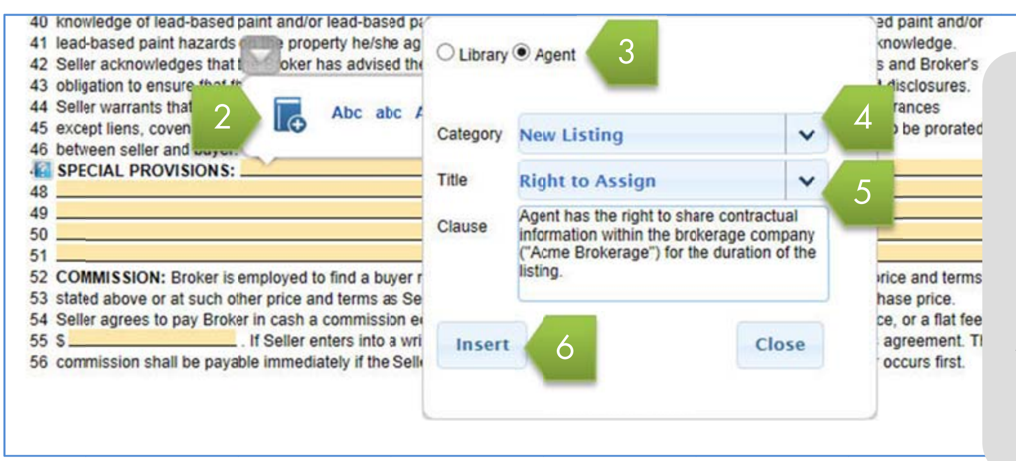


Figure 20 – Insert Clause

Insert Clause

1) Click a text field in a zipForm® form, and click the gray pencil for text field tools
2) Click Insert Clause button
3) Select the clause level
4) Select the clause category
5) Select the clause title
6) Click Insert

Managing Files

Files on zipForm® Plus can be stored and managed using extended storage tools, including zipVault® which stores documents (such as PDFs) alongside the live forms, and relay® which creates a secure online website for sharing information online with clients and participants and managing the transaction from start to finish.

Online Storage Options

To prevent discovery, maintain file records, and to keep a manageable TRANSACTIONS list, zipForm® Plus has three online storage options. On the TRANSACTIONS page, view files in List View in order to see the expiration date for each transaction in zipForm®. Transactions stored in relay® Transaction Management are visible through the transactions page in the relay® account.

Switch to List View

zipForm® Plus Storage

Files which only contain only zipForm® forms are considered live files. These files are stored on zipForm® Plus for fourteen months after the date that the forms were last edited by the user. To extend the storage on any file which only contains zipForm® forms, open and update the file at least once a year.

zipVault®

A transaction with at least one document that is not a form (PDF, Excel Spreadsheet, Word document, etc.) are considered zipVault® files. Adding a document by uploading, emailing, faxing, or receiving completed e-Sign documents automatically activates the zipVault® storage period. Files with zipVault® storage are stored until their expiration date, as long as the file is not removed from zipForm® Plus. The expiration date can be changed by opening the file, and clicking the calendar button next to the zipVault® expiration date located on the top right side of the file, above the transaction's folders.

relay®

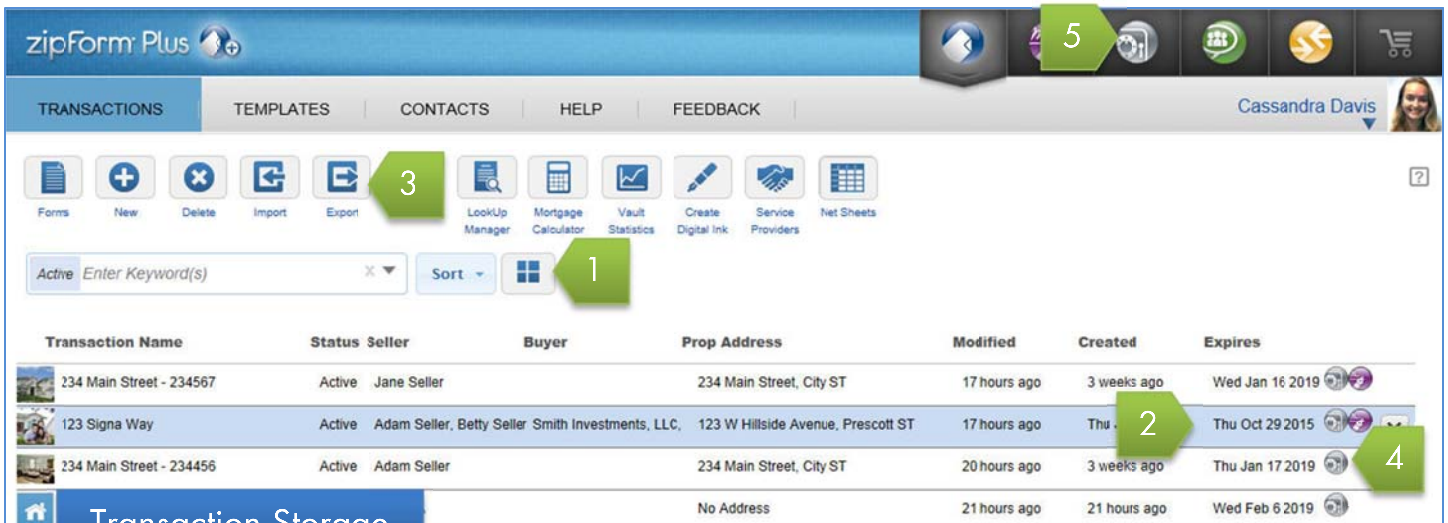
Sync with relay® for complete transaction management. relay® files can be stored online and managed within the brokerage. relay® is an easy-to-use Internet tool for managing real estate transactions online which also enables agents to connect with clients 24/7 through a secure, custom branded transaction website.

Learn more at www.ziplogix.com/relay

To add zipVault® or relay® to your account for extended online storage and file management that fits your needs, please contact zipLogix® sales at: 866-627-4729

Archiving Files

Manage and archive stored online transactions using zipForm® Plus. The TRANSACTIONS page contains powerful tools to sort files, track online storage, and quickly find the transaction you need.



Transaction Storage

Browse TRANSACTIONS in Icon View for large pictures, easy identification, and brief details about the file. Switch to List View to see additional transaction details, including file expiration dates. The Icon View/List View Button (1) located next to your sort options will change your viewing preference for this page. zipForm® will remember this preference until you change it again.

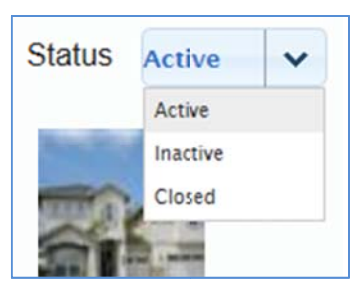
List view makes it easy to see the Expiration Date (2) for all files. The expiration date tells you how long the file will be stored online. Files can be exported (3) to download all or part of the file for offline storage. Files stored offline can be imported back to zipForm® Plus when needed.

Open a transaction to update the expiration date. Files with additional documents stored in zipVault® will have an expiration date under the file name when you open the file. Click the calendar button next to the expiration date inside the file to change the date. Files that only have live forms and do not have additional documents are stored for fourteen months after the date they were last edited. Open the file and change text inside one or more forms, or add a document to the file, in order to extend the expiration date.

Files with the zipVault® icon (4) contain documents stored in zipVault®. Click the zipVault® product button (5) at the top of zipForm® Plus to sort by zipVault® transactions.

Mark a file as closed or inactive to continue storing that file online without cluttering your list of active transactions.

1. Click the property photo to edit transaction details
2. Change the transaction Status to Inactive or Closed
3. Click Save



Inactive and closed transactions will not appear on your main TRANSACTIONS page by default. Search for Inactive, Closed, or All files by clicking the arrow on the search (Enter Keywords) field on the TRANSACTIONS page, and selecting to search for Closed, Inactive, or All files.

Exporting Transaction files

Export

Export transactions to download a copy to your computer or offline storage. Transactions can be exported individually, or you are able to export many transactions at once.

Exported transactions are downloaded as a compressed (*.ZIP) file, and can include live forms, PDFs of forms, and documents and folders stored in zipVault®.

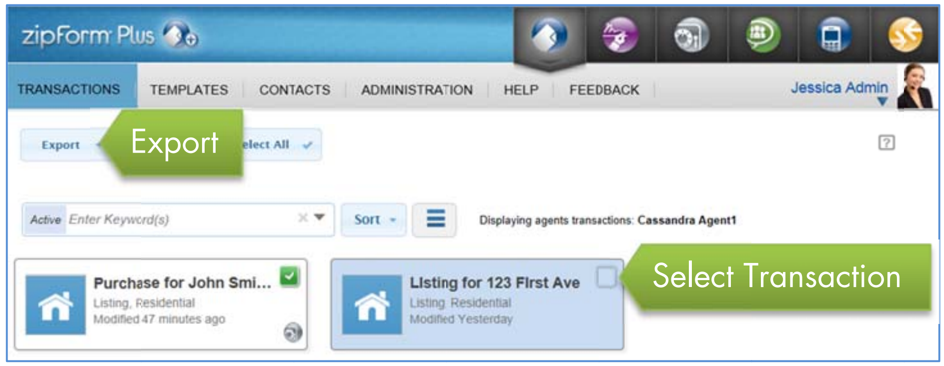


Figure 21 – Selecting transactions when exporting multiple transactions

Click Export to export a file. Choose whether you are saving zipForm® Content, zipVault® content, or both, and follow the instructions on the screen to save and store the exported transaction.

Live zipForm® content (*.xzfx files) inside the exported transaction folder can only be viewed if the .ZIP file or .XZFX file is imported to zipForm® Plus, or the .XZFX file is imported into zipForm® 6 Standard. The zipVault® content and forms saved as a PDF are viewable in their native format.

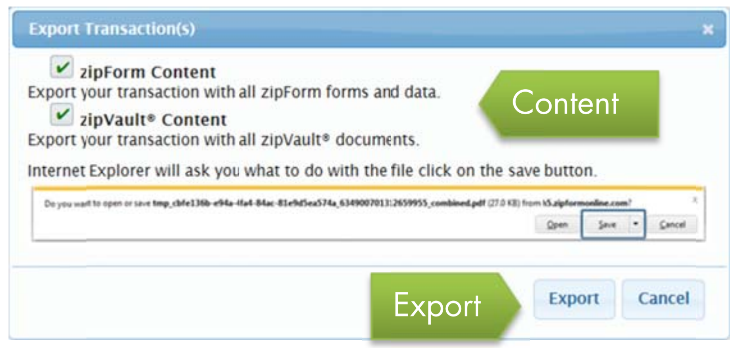


Figure 22 – Exporting a transaction

Importing Transaction Files

Import

Exported zipForm® Plus transactions in .ZIP format and live zipForm® forms in .XZFX format can be imported to the TRANSACTIONS list. A single transaction file can also be imported individually in order to add to an existing zipForm® Plus file.

Click Import to import a file, and then Browse to search the file on your computer.

Once you have selected the file (or files) to import, click OK. If there is any zipVault® content in the transaction that you are uploading, you will be given the choice of importing the zipVault® content as well.

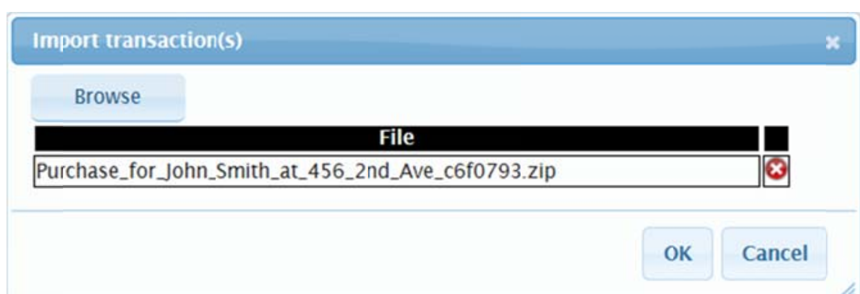


Figure 23 – Importing a transaction

When you click OK, the file(s) will be uploaded to your zipForm® Plus TRANSACTIONS page.

Note: Imported files are uploaded to your TRANSACTIONS page. From the TRANSACTIONS page, a newly imported file can be reassigned to another team member by editing the transaction details.

Profile

Your zipForm® Plus account has a profile that allows you to personalize zipForm® Plus and connect to your e-Sign tool of choice.

Access the Profile by clicking your name in the top right corner of zipForm® Plus, and then clicking Profile.

You can access the Profile from any screen in zipForm® Plus, and click Close within the profile to return back to the area you were working.

Figure 24 – Open the zipForm® Plus Profile

Profile: About Me

Edit your user information, upload your profile photo, and edit the address that prints at the bottom of your forms. Save and update contact information and settings for your forms and branding.

1) My Information – Update your contact information
2) Add Picture – Click to add or update your profile picture, which is also included in emails sent from zipForm® Plus
3) Reset password - Change your zipForm® username or reset your password (used to log in to zipForm® Mobile Web Edition or sync with zipForm® 6 Standard)

Note: Resetting your password will not change your password at your association or brokerage website.

4) Address Information – Use the menu to edit the address information printed at the bottom of your forms
5) Email Signature – Added to the bottom of emails sent from zipForm® Plus. Add text, images, and HTML formatting, as needed, using the Email signature text box and tools.
6) After editing, click Save to save your changes.

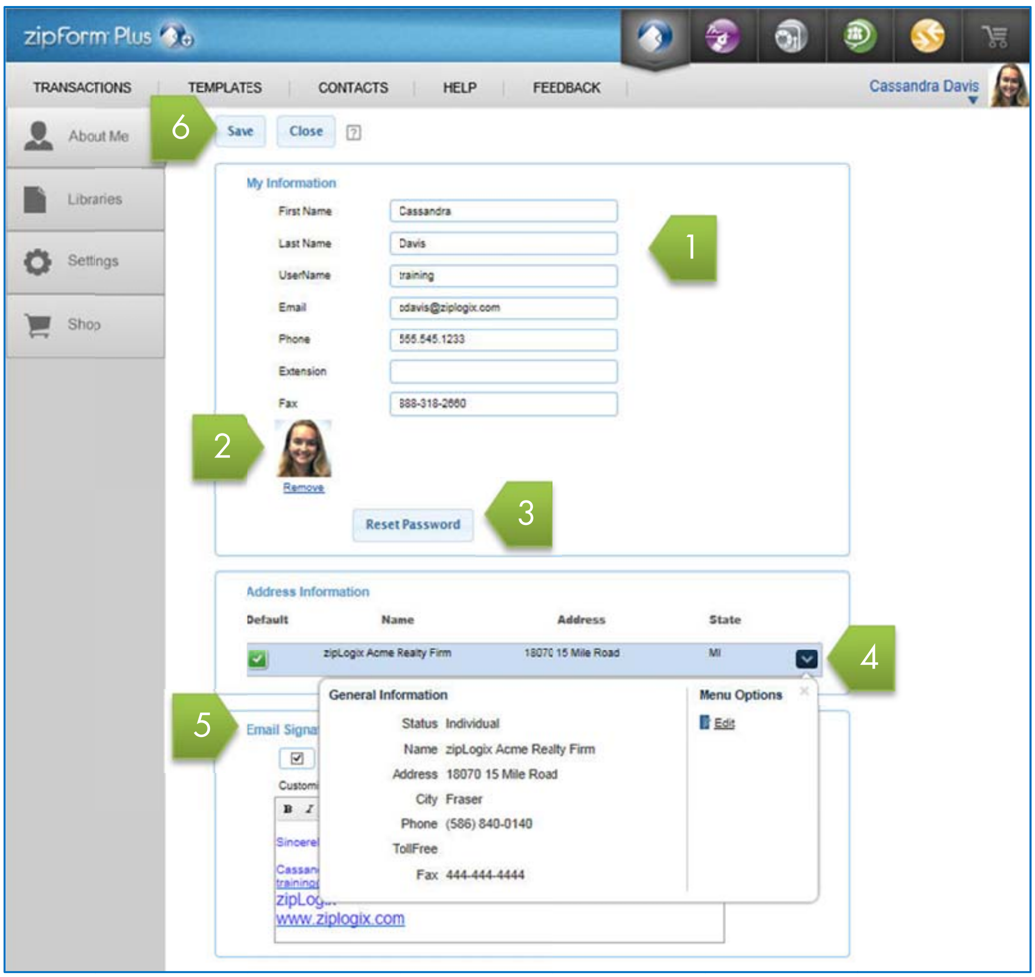


Figure 25 – Update personal information using the About Me section of the profile

Profile: Libraries

Libraries are sets of blank forms that have been created by a brokerage, association, or MLS for use in real estate transactions. The **Libraries** section of your profile displays a list of your form libraries and zipLogix® products. After opening the zipForm® Plus profile, click **libraries** to open the libraries page.

Use the **Organize** button to click and drag to arrange libraries in a preferred display order. The first library on the list will be the library displayed by default on the **All Forms** tab when you are searching for forms within a transaction file.

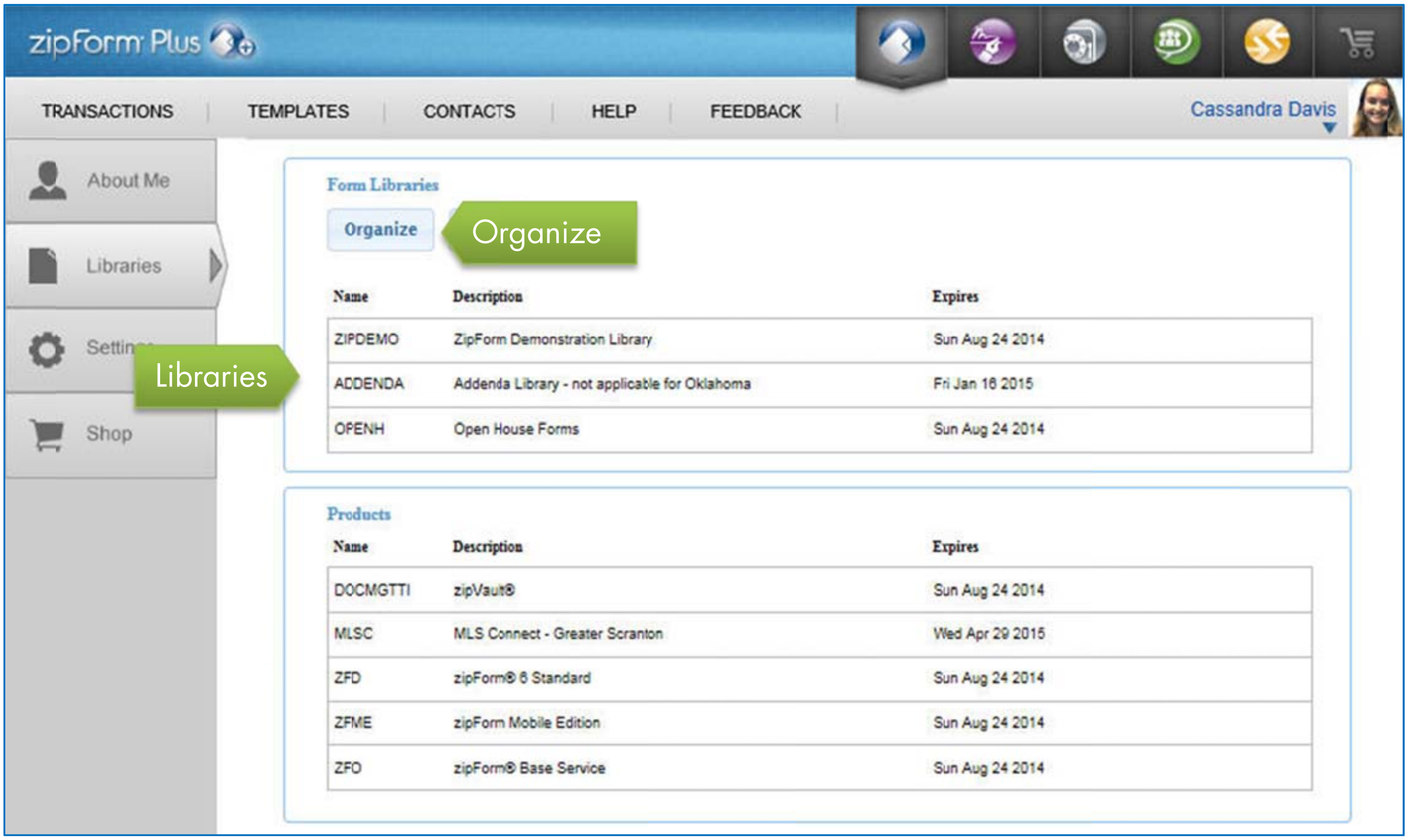


Figure 26 – The Libraries page within the profile

The Libraries page also displays a list of the zipLogix® products and services connected with this account. If you are looking for access to a product and it is not listed here, you can click the **Shop** link to add products, such as the zipForm® Mobile Web Edition.

Profile: Settings

Use the settings to fine-tune your preferences in zipForm® Plus, including setting which program is used when the e-Sign button is clicked.

1) E-Signature Options - Choose the program used for signing documents (zipLogix Digital Ink® or DocuSign®) when you click e-Sign. The program selected under settings will be used to send documents for e-Signatures. If you are using DocuSign®, you will be prompted to enter your DocuSign® username and password.
2) Under General Options, Enable Autosave to save your files every 15 minutes while you are working in the form on zipForm® Plus.
3) *(Optional)* Change the field colors used when forms are displayed on your screen, if desired
4) Enable automatic notifications when you receive faxed or emailed documents (when using zipVault®)
5) Scroll down to connect to other applications, such as relay® transaction management (www.zipLogix.com/relay)

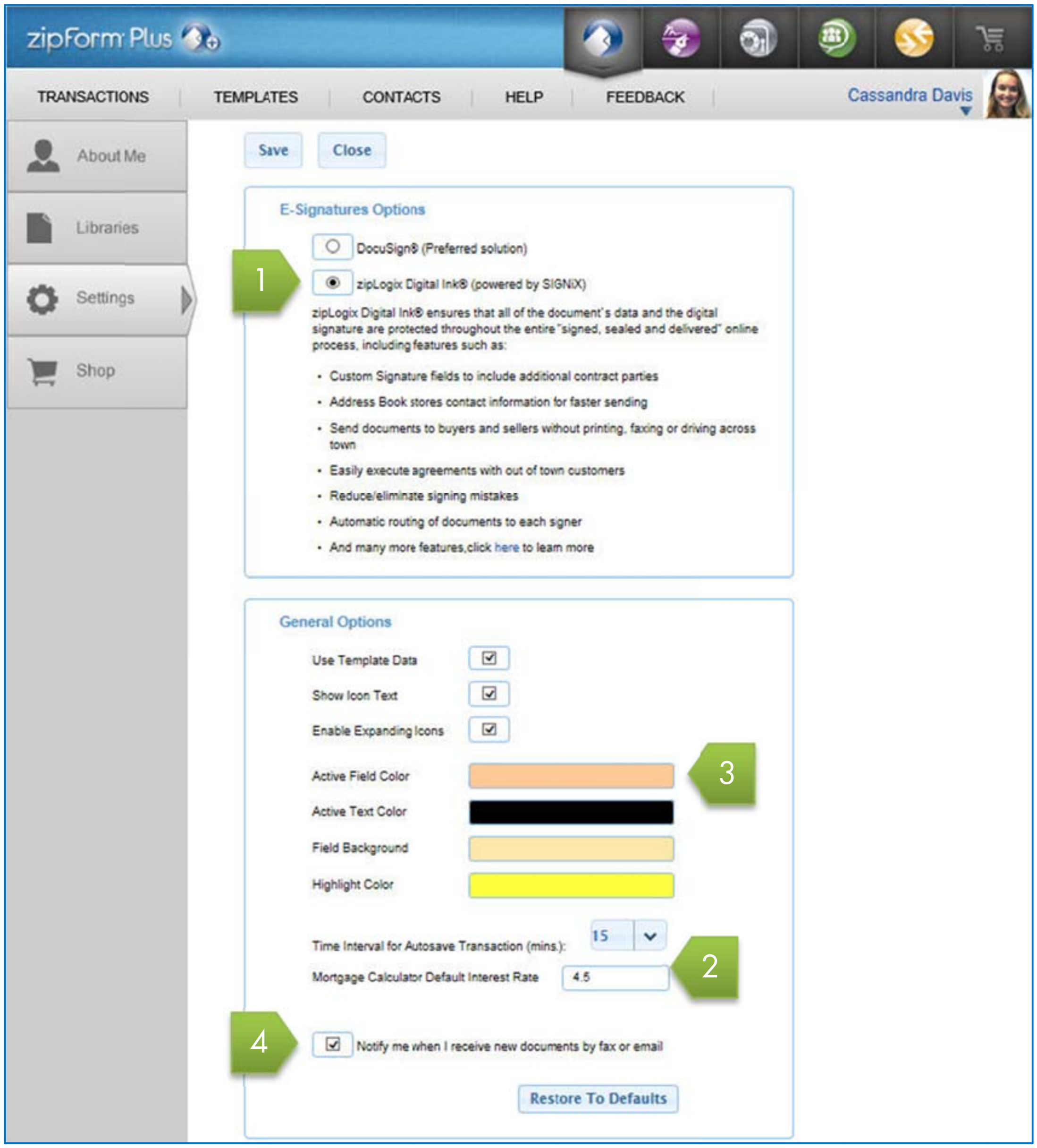


Figure 27 – Update settings in the zipForm® Plus Profile

Note: The e-Sign integration allows you to send for click-to-sign e-Signatures using zipLogix Digital Ink® or DocuSign®. Both zipLogix Digital Ink® and DocuSign® are additional products which may be provided by your association, brokerage, or MLS, or may be purchased independently. If one or the other needs to be purchased, they can be purchased through your zipForm® Plus Shop or directly within the profile by clicking Add Credits (for zipLogix Digital Ink®) or clicking DocuSign® Subcription(s) (for DocuSign®). Learn more, and find current pricing at: www.zipForm.com/products

Reference: Quick Tools

The Quick Tools are the blue buttons at the top of the page in zipForm® Plus. They help you to do everything from starting a transaction to sending for e-signatures, and they can change based upon which section of zipForm® Plus is currently open. By default they are labeled, and will magnify when you mouse over the quick tool. Here is a quick reference defining the different zipForm® Plus Quick Tools.

TRANSACTIONS page

Forms – Opens the forms editing page. Shortcut to opening and filling out a form without starting a new transaction file.

New – Start a new file to store forms and documents.

Delete – Select files to delete. Please note, deleting a file from the Transactions List will delete the forms, zipVault® documents, and links to zipLogix Digital Ink® signed documents for this file.

After clicking delete, you will be prompted to select files to delete. Select a file by clicking on the file while the delete option is activated. Delete by clicking the Delete button.

Delete | Cancel | Select All

Click Cancel to exit out of the delete screen, and return to the main Transactions List options.

Import – Import a downloaded file to your transaction files.

Export – Select files to download to your computer, saving them offline for backup or archival purposes.

Forms Advisor * – Provides advice on the forms that might be used for this transaction, based upon answers to a series of questions about the transaction ** Not available in all areas*

Clauses – Save or manage text (Clauses) so that the text (Clauses) can be inserted into forms when appropriate. Legal and brokerage mandated text are commonly added as clauses.

Lookup Manager – Manage the text that is used for the drop-down Lookup Fields. This is helpful for correcting a typo or adding to the lookup fields. Lookup fields are used to save time while filling out forms. They contain text that was previously typed for this field in other forms or files.

Mortgage Calculator – Calculate rates or payments, or download an amortization table for fixed rate loans.

Vault Statistics – View your storage statistics for documents stored alongside your forms in zipForm® Plus.

Transfer Transactions * – Transfers transactions into a user's account within the brokerage or team version of zipForm® Plus. **Only available for admins, and only used after a user has been removed from the brokerage or team.*

Create Digital Ink® – Click to create a new transaction for zipLogix Digital Ink® signatures. This can be used in order to send PDF files for signing outside of a zipForm® Plus transaction, and without necessarily adding zipForm® forms.

Service Providers – Connect to service providers and partners in your area in order to save time when completing forms or working inside files.

Net Sheets * – Update the master net sheet used for default transaction calculations within files.
** Not available in all areas*

List View – Switch to viewing a list of the documents and forms in this file

Icon View – Switch to viewing tiles (icons) for these documents

Transaction File – Documents Tab

Back – Return to the previous location within the **Documents** tab

Apply template – Add a template (a saved packet of forms) to this file

Note: *Any text, calculations, or check boxes saved within the template may be applied to this file when you apply the template. Please be aware that this may change information that has already been entered in your forms.*

Add document – Upload a document (PDF file, Excel Spreadsheet, Word Document, Picture, etc) from your computer to this file if you have the zipVault® option in zipForm® Plus. Learn more at www.zipForm.com/zipvault

Add folder – Add a new folder to organize documents and forms if you have the zipVault® option in zipForm® Plus. Learn more at www.zipForm.com/zipvault

Delete Document – Select documents or forms to remove from this file

Note: *Deleted documents are permanently deleted from the online file*

Print – Print a copy or copies of a single form or multiple forms within the zipForm® Plus file

Save as PDF – Download a copy of selected forms from this file to save on your computer, or save them within the file as a locked PDF document

Send – Fax or email forms and/or documents to any fax number or email address

Transaction Information – Click to fill out forms or reference the Transaction Information for this file

e-Sign – Click to prepare a set of documents to send for paperless signatures using zipLogix Digital Ink® or DocuSign®

Share – Click to select documents to share online if you are using zipVault®.
Note: You can only share uploaded (zipVault®)documents or forms saved as PDFs within the file (using Save as PDF*).*

List View – Switch to viewing a list of the documents and forms in this file

Icon View – Switch to viewing tiles (icons) for these documents

Transaction File – Parties Tab

New – Add a new party (contact) to this file. After clicking New, you can select the party role and enter or import key information about the party to the file and forms.

Delete – Select parties to delete from this transaction file.

Transaction Information – Click to fill out forms or reference the Transaction Information for this file

Transaction File – Property Tab

Save – Save changes entered in the property tab fields

MLS Connect * – Import listing information into the form fields from a participating MLS
** Not available in all areas*

Transaction Information – Click to fill out forms or reference the Transaction Information for this file

Forms Workspace

Fullscreen – View the current form in fullscreen, without additional navigation or distractions (click again to return to regular form view)

Save – Save changes entered in the current form (form changes are also saved when changing forms or switching between Fastfill and form views)

Email – Fax or email forms and/or documents to any fax number or email address

Print – Print a copy or copies of a single form or multiple forms within the zipForm® Plus file, or use it to print a blank copy or a sample copy of a single form from the file

Transaction Information – Click to fill out forms or reference the Transaction Information for this file

Fastfill – Click to strip away standard form text ("boilerplate" text) and view only the fillable fields for the form, then click again to see the form as it is normally viewed

Save as PDF – Download a copy of selected forms from this file to save on your computer, or save them within the file as a locked PDF document

Highlight – Adds highlighting to selected boilerplate text from the form. Click and drag to select text first, then click highlight and pick the highlighting color. Highlighting is included when printing, emailing, faxing, or sending for signatures. Only standard form text ("boilerplate" text) can be highlighted.

Strikeout * – Strikes out selected boilerplate text from the form. Click and drag to select text first, then click strikeout. Double-click struck-out text to remove the strikeout. Strikeout is included when printing, emailing, faxing, or sending for signatures. Only standard form text ("boilerplate" text) can be lined out. ** Not available on all forms*

MLS Connect * – Import listing information into the form fields from a participating MLS
** Not available in all areas*

e-Sign – Click to prepare a set of documents to send for paperless signatures using zipLogix Digital Ink® or DocuSign®

More – Access additional tools

Check Spelling – Check the spelling on fields that have been filled out in this form or other forms within the file

Notes – Add or edit electronic sticky notes for this form which can be viewed online or shared via PDF, but which do not print on the forms

N/A

N/A Fill – Fill blank text fields with N/A (not applicable) or text of your choosing

Look Up – Edit the drop-down look up fields that can be used to fill in text fields with previously typed text (such as city, state, or zip code)

Undo – Undo the last change to a field on this form

Redo – Restore the last undone change

Activate Intellicopy – Automatically fill in text fields with the intelicopy – zipForm®'s best guess at the text which should fill that field based on other fields completed in this file

TEMPLATES page

Create New – Start a new template to store forms and documents to be used in future transaction files.

Delete – Select templates to delete. Please note, deleting a template from the **Templates List** will delete the forms, documents, and information associated with this template. The template cannot be retrieved.

Note: Deleting a template does not affect transactions that already used this template.

After clicking delete, you will be prompted to select files to delete. Select a template by clicking on the file while the delete option is activated. Delete by clicking the **Delete** button.

Delete | Cancel | Select All

Click **Cancel** to exit out of the delete screen, and return to the main TEMPLATES options.

Import – Import a downloaded file to your template files.

Export – Select templates to download to your computer, saving them offline for backup or archival purposes

Clauses – Save or manage text (Clauses) so that the text (Clauses) can be inserted into forms when appropriate. Legal and brokerage mandated text are commonly added as clauses.

List View – Switch to viewing a list of the documents and forms in this file

Icon View – Switch to viewing tiles (icons) for these documents

CONTACTS Page

New – Start a new contact to store phone numbers, addresses, and emails, to be used in future transaction files.

Delete – Select contacts to delete.

Note: Deleting a contact does not affect transactions that already used this contact.
After clicking delete, you will be prompted to select contacts to delete. Select a contact by clicking on the file while the delete option is activated. Delete by clicking the **Delete** button.

Click **Cancel** to exit out of the delete screen, and return to the main **Contacts List** options.

Import – Import contacts from a CSV or VCard file.

Export – Select contacts to download to your computer, saving them offline for backup, or importing to other contact systems, or archival purposes.

List View – Switch to viewing a list of the documents and forms in this file

Icon View – Switch to viewing tiles (icons) for these documents

Product Requirements

Minimum System Requirements:

- Windows XP and above (Windows XP requires Google Chrome 26 and above or Mozilla Firefox 18 and above)
- Mac OSX 10.6 and above
- Internet Explorer 9 and above
- Mozilla Firefox 18 and above
- Safari 5.1.7 and above
- Google Chrome 26 and above
- Minimum Screen Resolution: 1024x768
- 2GB RAM
- PDF viewer that meets current Adobe PDF standards
- Internet Connection

Recommended System Requirements

- Windows 7 and above
- Mac OSX 10.6 and above
- Internet Explorer 9 and above
- Mozilla Firefox 18 and above
- Safari 5.1.7 and above
- Google Chrome 26 and above
- Recommended Screen Resolution: 1280x800 and above
- 2GB RAM
- PDF viewer that meets current Adobe PDF standards
- Internet Connection

Guidelines for Uploading Files

zipVault®

- Allowed File Types:
  .jpg,.gif,.png,.pdf,.doc,.docx,.xlt,.xls,.bmp,.txt,.csv,.rtf,.zip,.mp3,.wma,.mpg,.flv,.avi,.jpeg,.mp4,.mp3,.ppt,.pub,.m4a,.mov,.vts,.xzfx,.msg,.pst,.docm,.dotx,.dotm,.xlsx,.xlsm,.xltx,.xltm,.xlsb,.xlam,.pptx,.pptm,.potx,.potm,.ppam,.ppsx,.ppsm,.sldx,.sldm,.thmx
- Files sent using the email to zipForm® option should be documents. Images are not accepted due to possible confusion with images in email signatures, background, or other email content.
- Maximum size: 15.4 MB

Images (Property Photos, Agent Photos, and Contact Photos)

- Allowed File Types:
  .jpg, .jpeg, .gif, .png
- Image format: Square
- Actual dimensions: 64 x 64 pixels. When uploaded, images are resized to 64 pixels on the smallest size and then cropped to square.
- Maximum size: 4 MB

Product Support Information

Product support is available from our Help Desk to registered zipForm® Plus users between the hours of 8:00 a.m. and 8:00 p.m. Eastern Time Monday through Friday.

Help Desk:

http://support.ziplogix.com

Fax Number :: 586-790-7582

Sales:

Email :: sales@ziplogix.com

Fax Number :: 586-790-7582

Website:

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www.zipform.com

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