

# zipForm<sup>®</sup> Plus

## Quick Tips

2018



zipLogix Academy<sup>™</sup>



We are excited to announce the release of our new Platform Design! With these new enhancements in full swing, we wanted to take you inside zipForm® Plus and share some quick tips that may be useful. Please take a moment and familiarize yourself with these new features, updated tools, and the exceptional overall layout of this new user-friendly platform.

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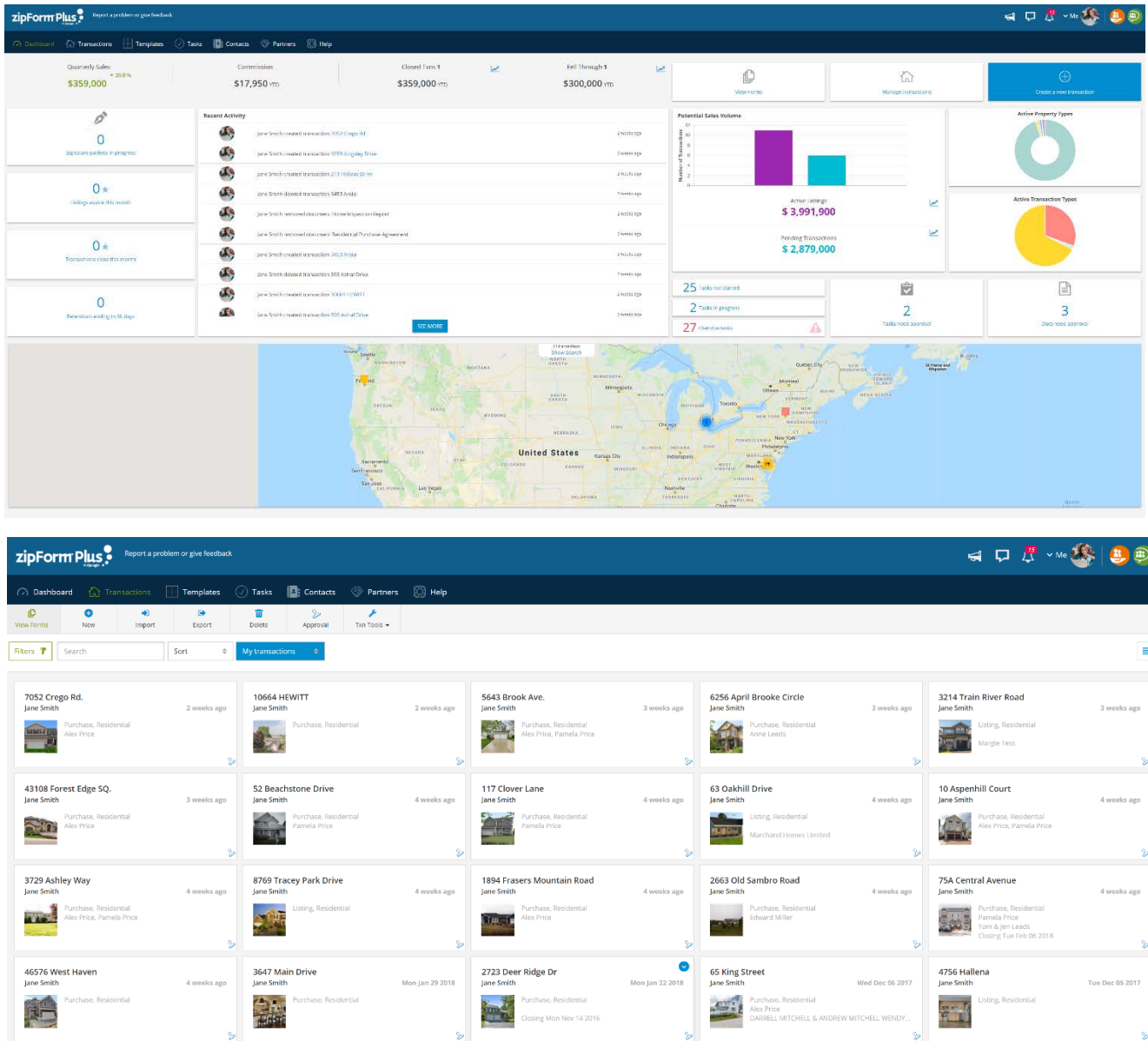
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## A New Look

Once you access your account, you will instantly notice the fresh appearance of zipForm® Plus. With many features now at your fingertips, navigation has never been easier.





## Navigation Bar

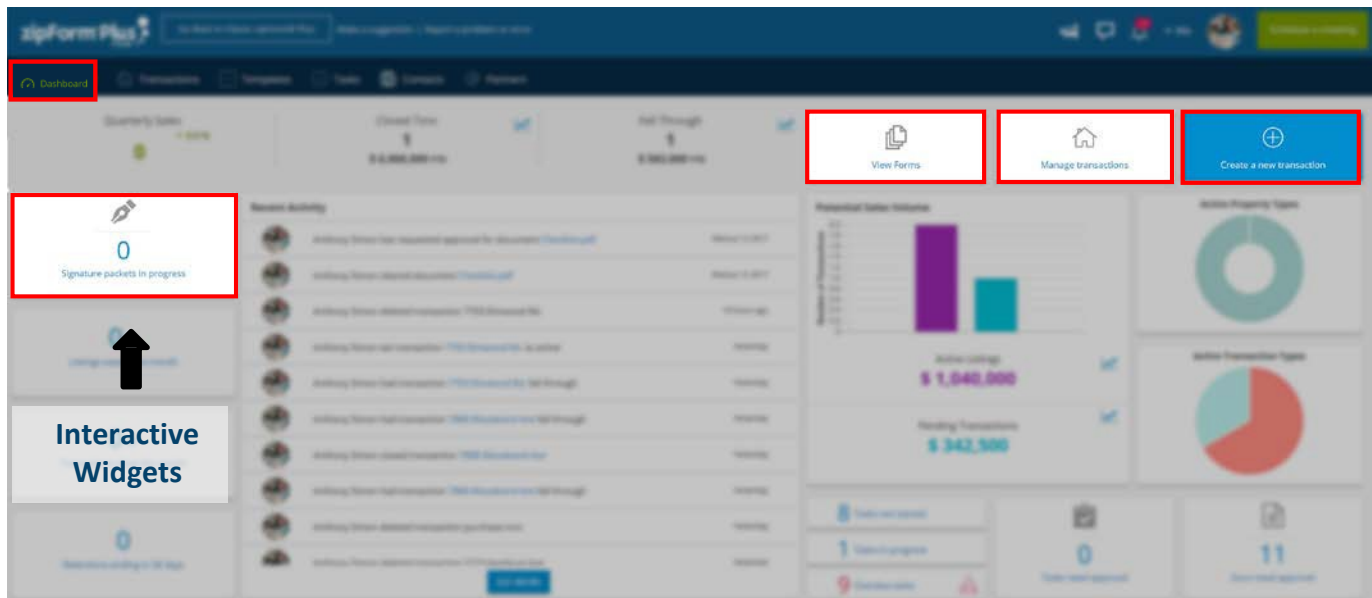
The zipForm® Plus Navigation Bar is where you can navigate to different areas of the application.



<b>Dashboard</b>	Review transaction details in your dashboard along with many other useful options such as create a new transaction, manage transactions and view forms.
<b>Transactions</b>	Review all transactions, edit, delete, import/export, and create new transactions using various property types.
<b>Templates</b>	Review all templates, edit, delete, import/export, and create new templates using various property types.
<b>Tasks</b>	Review urgent tasks and statuses for all your transactions, edit, delete, and display these tasks in a calendar view. You may also view any cloud-based calendars you currently access such as Google, MS Live and Office 365.
<b>Contacts</b>	Review parties involved for all your transactions, edit, delete, create new and import/export. You also have the ability to import cloud-based calendars you currently access such as Google, MS Live, Office 365, Top Producer and Yahoo.
<b>Partners</b>	Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money.

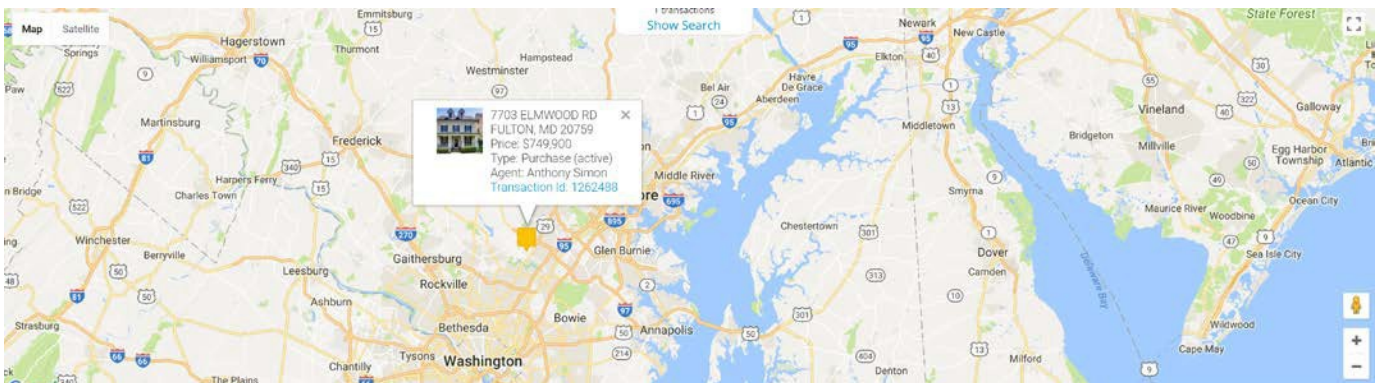
## Dashboard

Welcome to the Dashboard! At a glance, along with interactive widgets, agents can review their entire progress for all of their transactions as well as viewing forms, manage transactions, and create a new transaction all from one central location.



## Map Display

Details pertaining to property information are also displayed on the map within the Dashboard.

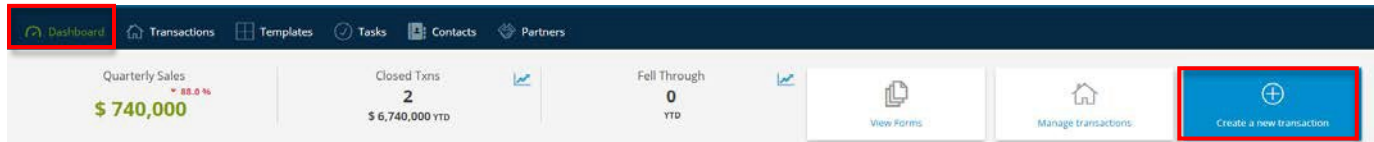




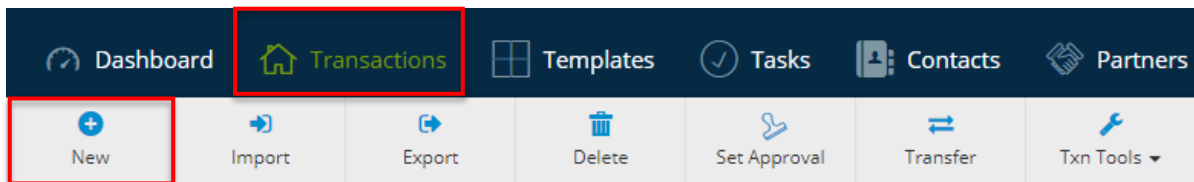
## Creating Transactions

New transactions can be created in various places. Create your transactions directly from your “Dashboard” (A:) or by clicking “Transactions” (B:)

A:

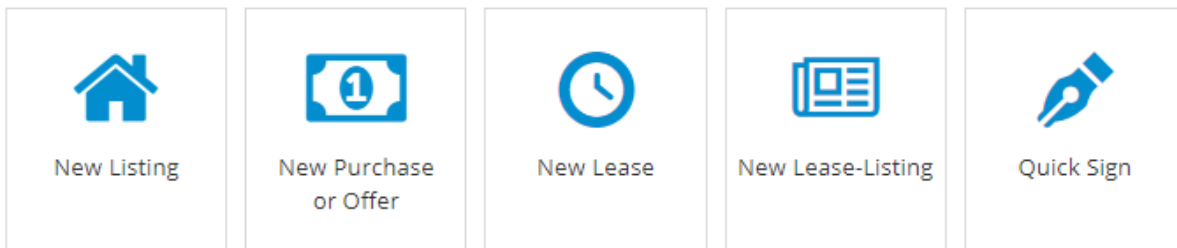


B:



## Select Your Transaction Type

Once you start creating your transaction, you will be asked to select one of the transaction types below:





## Transaction Information

After selecting the transaction type, you will be able to add the necessary transaction information, including importing from your MLS. Please understand that not all MLS's participate in the utilization of zipFormMLS-Connect®. Please contact your MLS for further details.

### Transaction Information

#### Name

#### MLS Property Address

 MLS Connect

#### Property Type

- |                                   |   |
|-----------------------------------|---|
| <input type="radio"/> Residential | <input type="radio"/> Commercial        |
| <input type="radio"/> Industrial  | <input type="radio"/> Vacant Land       |
| <input type="radio"/> Multiunit   | <input type="radio"/> Farm and Ranch    |
| <input type="radio"/> Condominium | <input type="radio"/> Manufactured Home |



Add Image

#### Comment

#### Select Template






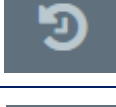
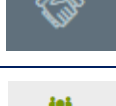

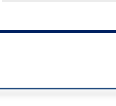
Cancel ✕

Save ✓



## Getting Around zipForm® Plus: Icon Assistance


Once you are in your transaction, you may notice some new icons and menu options. Please take a moment, familiarize yourself, and see what's new.

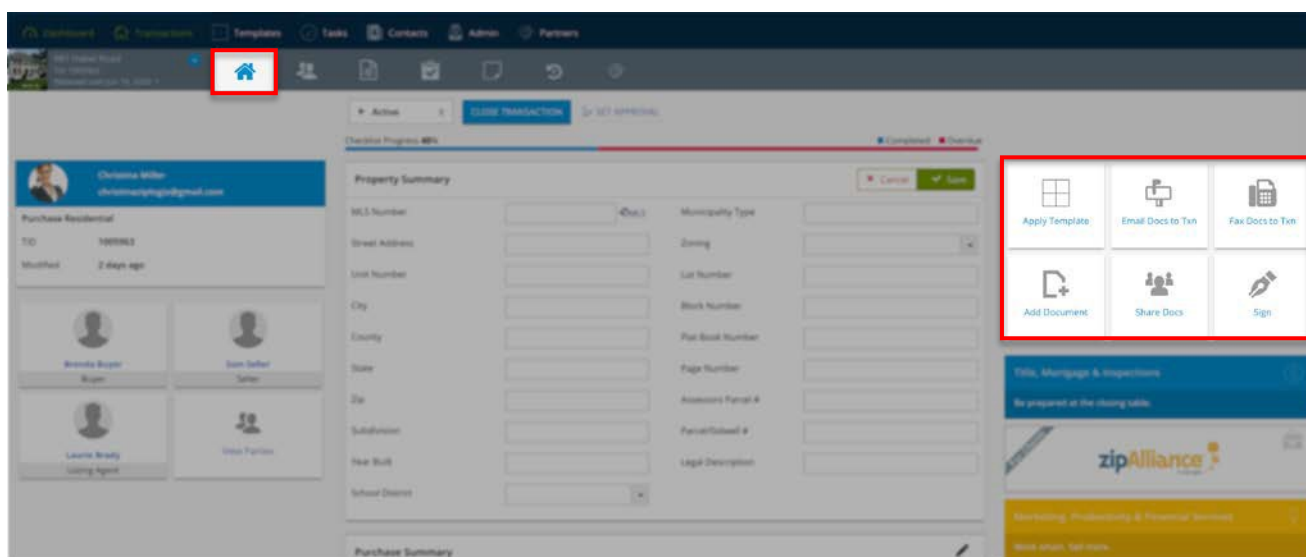
	<b>Transaction Summary:</b> Enter Property Information, Listing Information, and Purchase Information.
	<b>Transaction Parties:</b> Create new parties involved with the transaction. Edit existing parties and collaborate with parties using Private Share.
	<b>Form/Document Access within Transaction:</b> Access form libraries, add documents, add folders, apply templates and send documents for approval.
	<b>Checklists and Tasks:</b> Create new checklists, view/edit existing checklists and urgent tasks, delete checklists and view Calendar.
	<b>Notes:</b> Create reminders that pertain to the transaction. You can choose to e-mail, save as PDF and/or print notes.
	<b>History:</b> Track progress of transactions, review comments, and document approvals.
	<b>Partners:</b> Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money.
	<b>Private Share:</b> Collaborate with parties by sharing documents. Import parties using your zipLogix™ contacts or pull contacts in from one of your cloud base accounts.
	<b>Public Share:</b> Collaborate with parties by creating a public link for parties to access your documents.





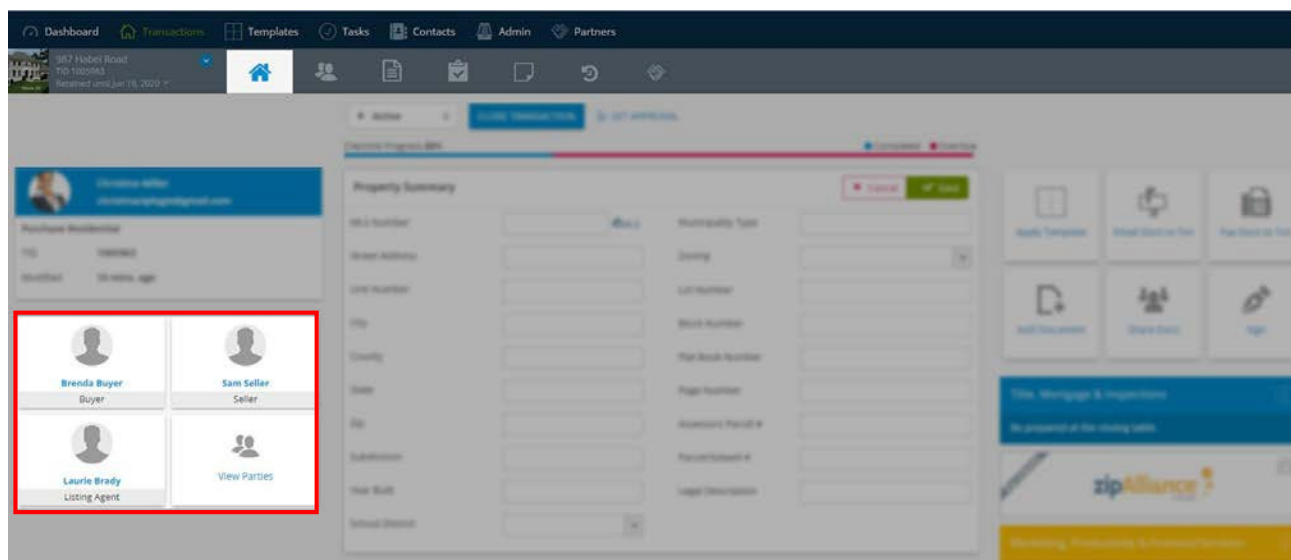
## Transaction Summary

While in the Transaction Summary  you can perform a number of actions by quickly accessing the menu you see below:



## Transaction Parties

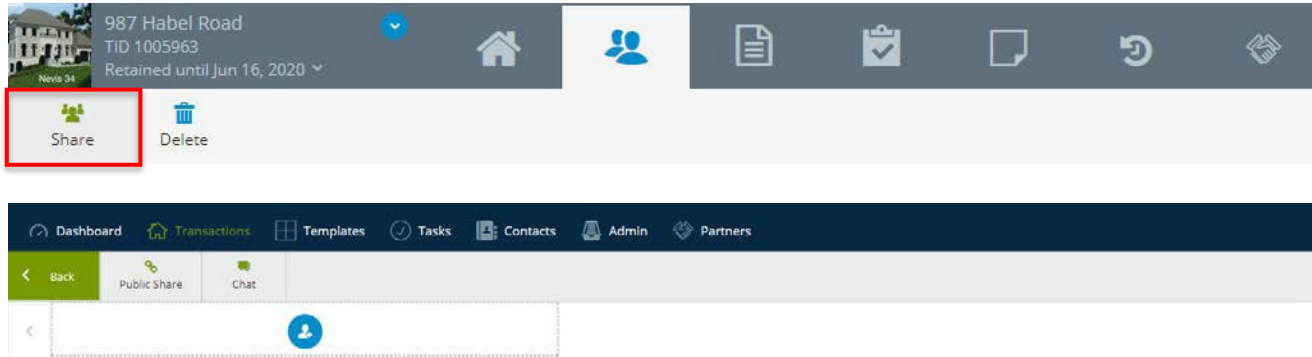
Within the Transaction Summary, you can also access your transaction parties. 



## Private and Public Share



Within the transaction parties tab, you have the ability to create new parties involved with the transaction, edit existing parties, and collaborate with parties using Private Share.



### Private Share

Create a private Share, documents and permissions will be granted only to specified user.



Click to start sharing

## Public Sharing

Turn Public Transaction sharing "On". Set an expiration date for the public links to expire. Then select the type of public link to create. Preview the link then copy to your clip-board.

Public Sharing

On

Stop Sharing Date 08/09/2017

Copy Link

Preview

<https://r.zipformplus.com/?par=eyJwdWJsaWNTaGFyZSI6IlpaMTgtTUJUM3w>

Public Share Link:

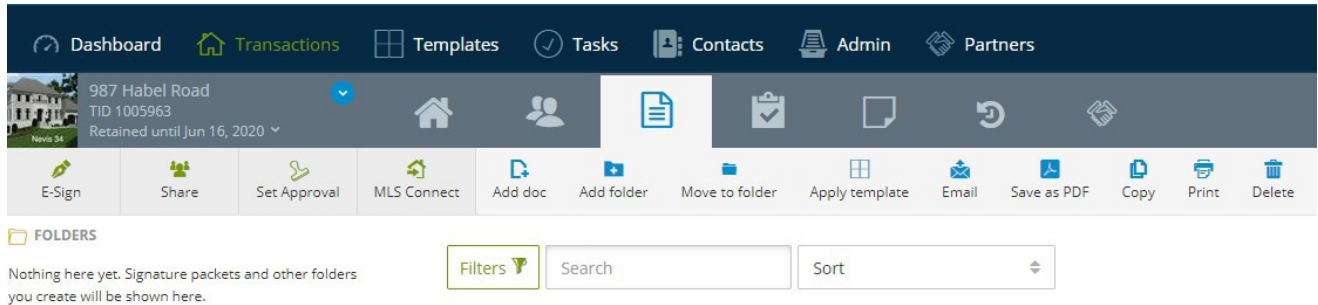
Select forms and/or documents from below. Click "Preview" to view the link. Click "Copy Link" to copy to your clip board.

- 987 Habel Road



## Form/Document Access

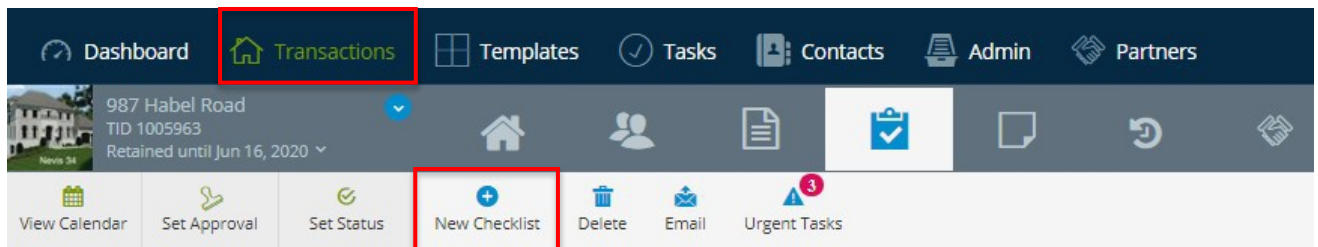
Access form libraries, add documents, add folders, apply templates, and send documents for approval.



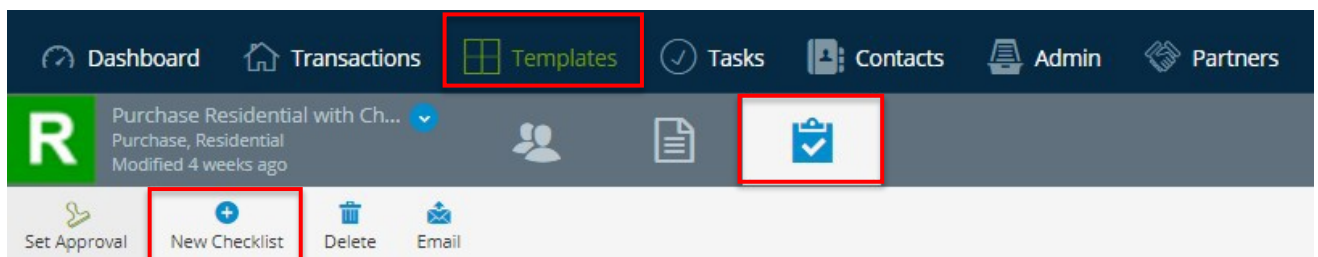
## Checklists and Tasks

Within “Transactions,” create new checklists, view/edit existing checklists and urgent tasks, delete checklists and view Calendar (A:). A checklist can also be created in “Templates”. Once created, these templates, along with the checklists, can automatically be added to your transaction (B:).

A:



B:





## Notes



Notes containing supplemental information can be added to any transaction.

Dashboard Transactions Templates Tasks Contacts Admin Partners

987 Habel Road  
TID 1005963  
Retained until Jun 16, 2020

New Email Save as PDF Print Notes

Christina Miller Jul 10, 2017 10:40AM  
Talk to seller about items that are staying with the property

Christina Miller Jul 10, 2017 10:38AM  
Please obtain additional additional photos of property and photos of water damage on barn floor

## History



Track progress of all transactions, review comments, and check on the status of a digital signature packet.

Dashboard Transactions Templates Tasks Contacts Admin Partners

125 Harrington Blvd.  
TID 1037045  
Retained until Mar 03, 2020

View

Check Status

Check Status

Check Status



## zipAlliance™ Partnership Program

Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money. Sort through categories and learn about the best solution for you.

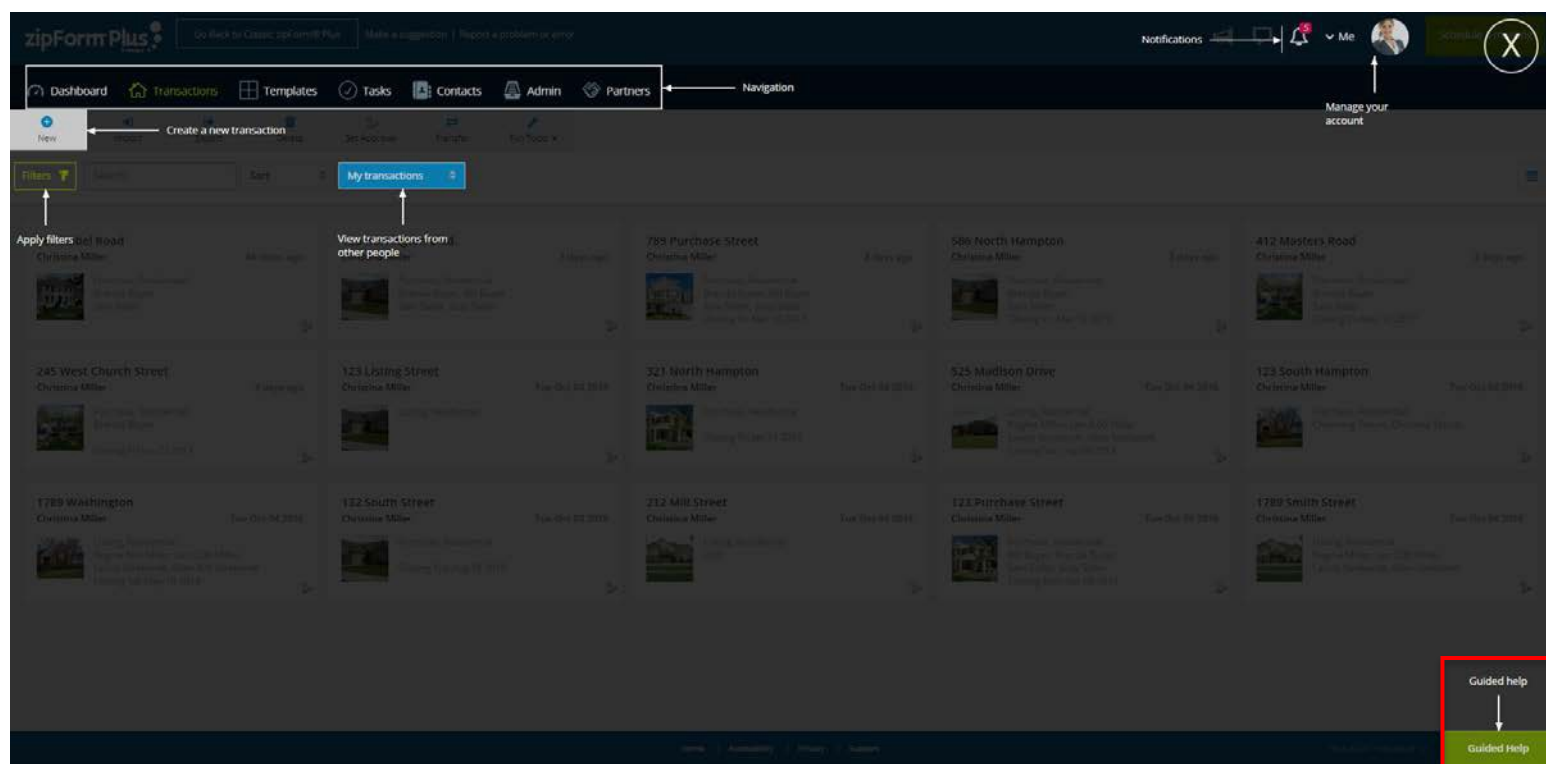
The screenshot shows the zipForm Plus interface with the zipAlliance™ Partnership Program section active. The top navigation bar includes Dashboard, Transactions, Templates, Tasks, Contacts, Admin, and Partners. The main content area displays three partner cards under the 'Productivity' category:

- corefact**: Easily market your listing, generate leads and build relationships with postcards, flyers and digital tools. [Learn more about Corefact](#). [Send to](#)
- MOVE EURO**: Connect your clients with money saving move related offers custom branded to you. [Send to](#)
- updater,**: Streamline moving for your clients once and for all, with a branded and personalized moving tool to save them hours (and headaches). [Send to](#)



## Guided Help

We understand changes take some time to get used to. We have taken extra steps to make sure we are always there for you when you need assistance. Explore the enhanced Guided Help feature and get step-by-step instructions during your entire transaction creation process.





## System Requirements

Please review our most recent system requirements.

### Minimum System Requirements:

- Windows 7 and above with 2GB of RAM
- Mac OSX 10.9 and above with 8GB of RAM
- Internet Explorer 11
- Mozilla Firefox 27 and above
- Safari version 8 and above
- Google Chrome version 35 and above
- Microsoft Edge Browser 13 and above
- Minimum Screen Resolution: 1024 x 768
- PDF viewer that meets current Adobe PDF standards
- Internet Connection
- Desktop or laptop computer

### Recommended Requirements:

- Windows 10 and above with 8GB of RAM
- Mac OSX 10.9 and above with 8GB of RAM
- Internet Explorer 11
- Mozilla Firefox version 30 and above
- Safari version 8 and above
- Google Chrome version 35 and above
- Microsoft Edge Browser 13 and above
- Recommended Screen Resolution: 1920 x 1280 and above
- PDF viewer that meets current Adobe PDF standards
- Internet Connection
- Desktop or laptop computer



## Support Information

Please feel free to contact our team should you need any further assistance!

### Help Desk:

586-840-0140

Monday-Friday: 24 Hours

Weekends and Holidays: 10am-10pm ET

<http://support.zipLogix.com>

### Sales:

Email: [sales@zipLogix.com](mailto:sales@zipLogix.com)

General Line: 866-627-4729

### Training:

Email: [training@zipLogix.com](mailto:training@zipLogix.com)

### Website:

[www.zipLogix.com](http://www.zipLogix.com)

### Office Location:

18070 15 Mile Road

Fraser, MI 48026