## Getting Started with zipCRM™

zipCRM™ effortlessly integrates with your existing zipForm® Plus account. This fully functional customer relationship management (CRM) system is now available as an easy and efficient time-saving tool inside of the zipForm® Plus platform, thanks to a partnership with Wise Agent.

Through zipForm® Plus Single Sign-On (SSO) integration, zipCRM™ allows agents to easily receive and track information, as well as follow-up with customers and prospects in order to quickly close deals.

Other features of zipCRM™ include:

- Marketing and drop campaigns
- Lead generation forms
- Contact manager
- Appointment calendar
- …and so much more, all to assist you in building your business in less time!

Below, learn how to get started with zipCRM™ by properly configuring your profile and establishing your email branding.

Sign into your zipForm® Plus account at www.zipformplus.com, or through your Brokerage, Association, or MLS site.
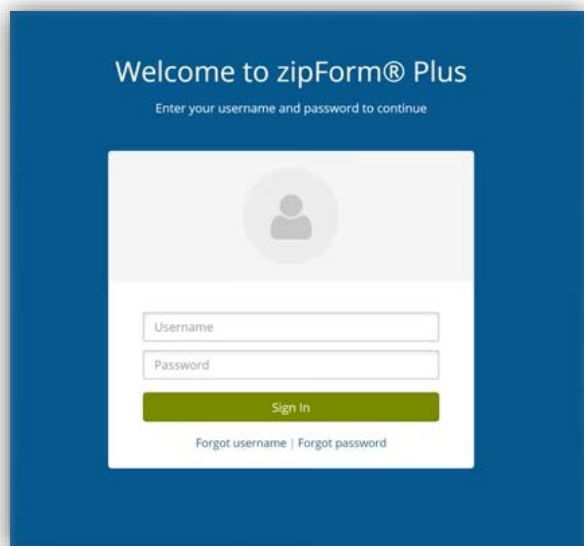
From inside your zipForm® Plus account, navigate to the upper right corner of your screen, and click the orange zipCRM™ icon to launch your FREE 30-day trial registration form.
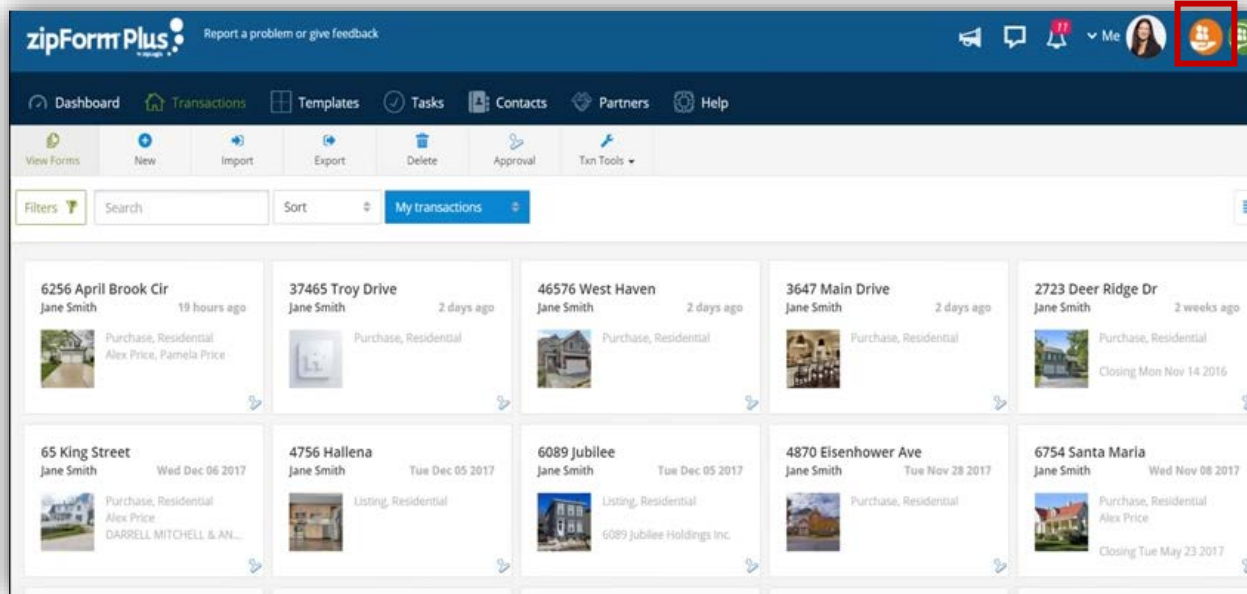


From here, you will create your own username and password, select your state, and identify how you heard of zipCRM™. Click the check box to accept the User Agreement, then click and drag the slider icon from left to right to unlock the program.
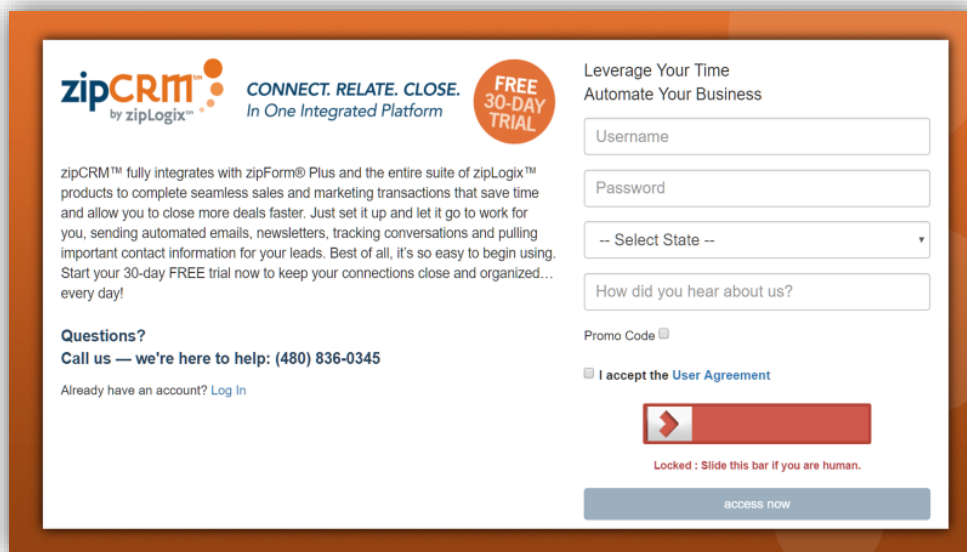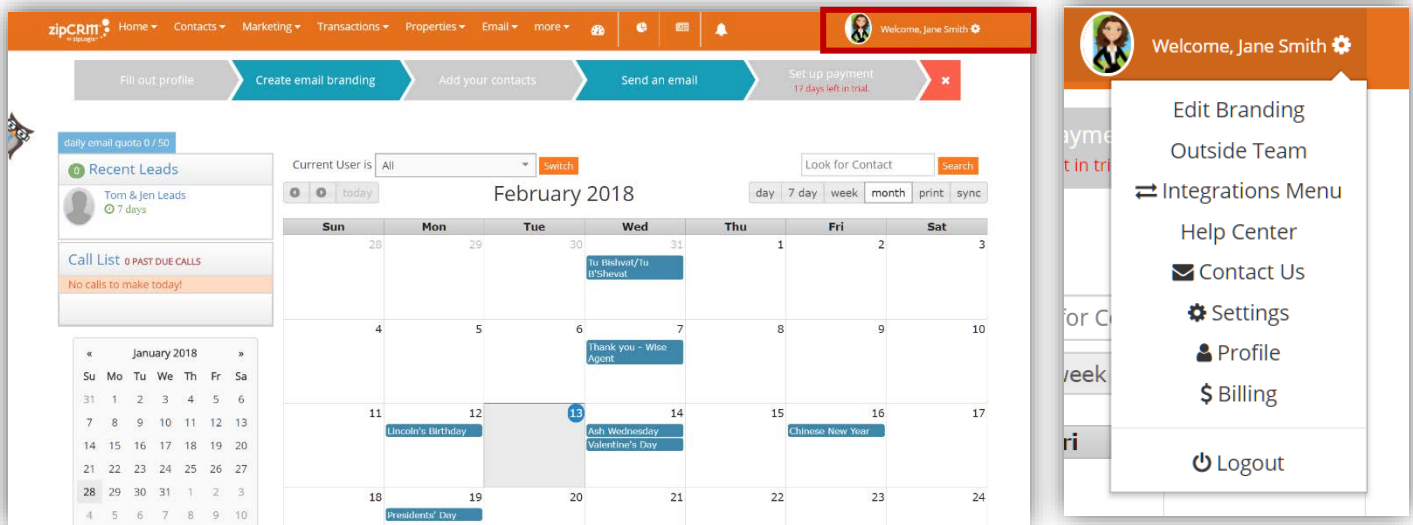
Once your account is created, you will be launched into your zipCRM™ home screen, where you will begin by setting up your **Profile**.

There are two ways to set up your zipCRM™ profile:

1. Click the **Welcome** icon in the upper right corner of your screen and select **Profile.**
2. Click the **Fill out Profile** link on the tracker.



Either of these ways will launch you to your **My Profile** screen, allowing you to upload your Agent photo by clicking on the icon photo to the left.
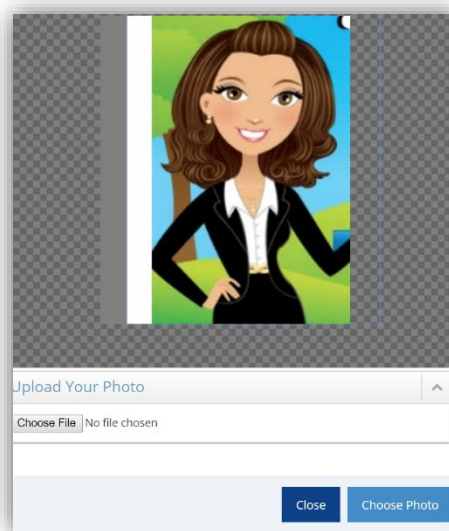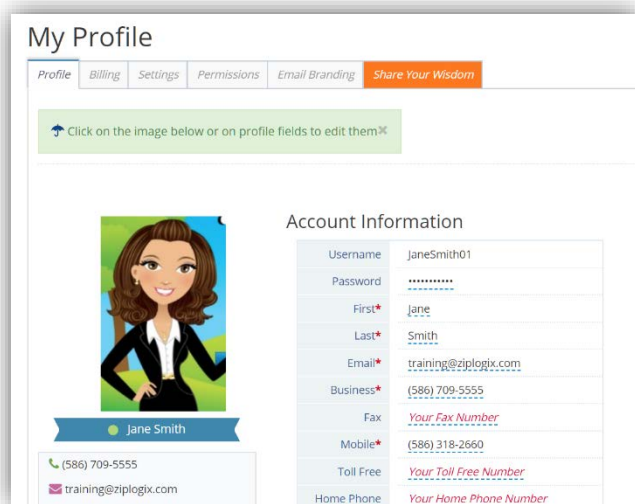
You may also wish to add your Company Logo, which can easily be done by clicking the **Change Logo** button and selecting your logo from the alphabetical listing provided. If your company logo is not available, simply email *help@wiseagent.com*, mention zipCRM™, and a representative will be happy to upload it for you.
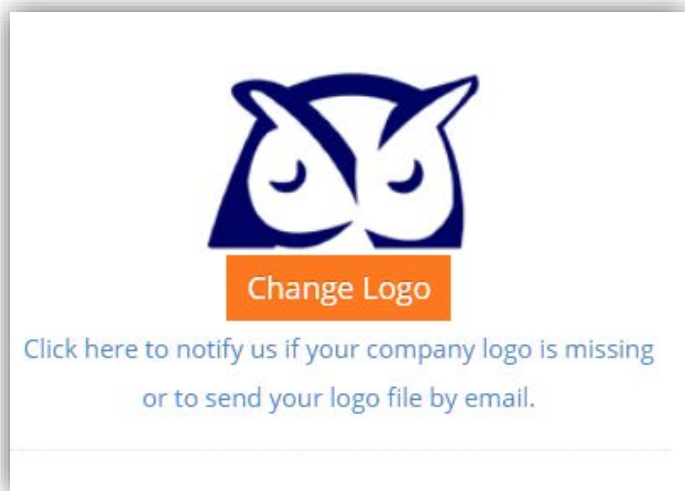


Of course, it is important to fill in your information in the **Account Information** fields, especially those marked with a red star.

If you have team members that you would like to add to your zipCRM™ account, it is easy to upload their photos, as well as input their information in the fields provided.

Next, you may set up your email branding. This is important for sending out email correspondences to your clients which include your identifying brand.

There are three ways to access the **Edit Branding** screen:

1.  Click the **Create Email Branding** link on the tracker.
2.  Click the **Edit Branding** button under My Profile.
3.  Select **Edit Branding** from the **Welcome Menu** in the upper right corner.
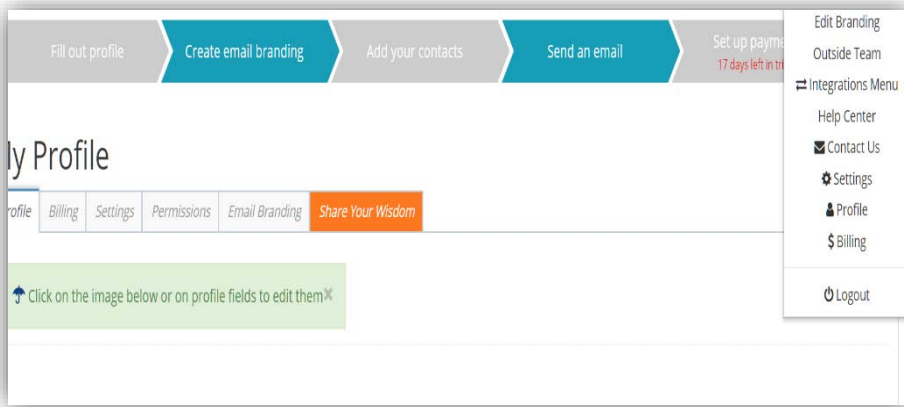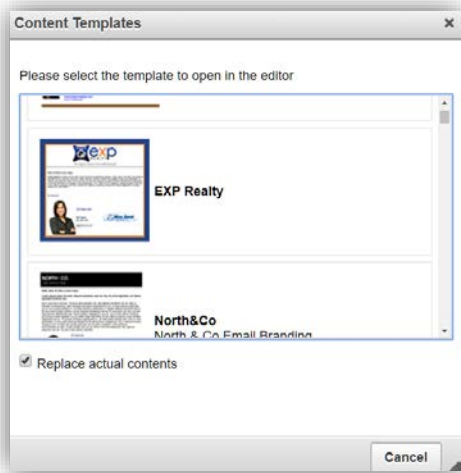


Using any of the three, above options will direct you to a new area where you may choose a nice zipCRM™ Template by clicking the **zipCRM™ Templates** button.
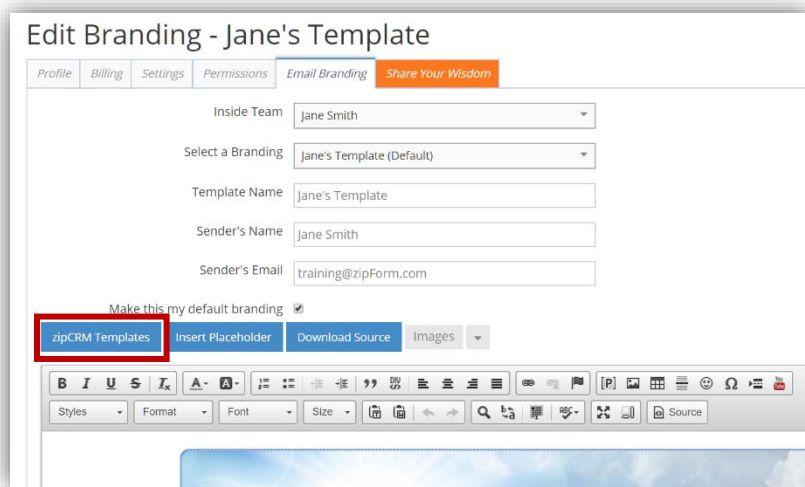
Scroll through the many stock templates and select the one that is right for you. Your information will automatically populate the template.

If you would like to have your own branding available, contact **(480) 836-0345**, mention zipCRM™, and a representative will be happy to upload it for you.



**Thank you for using zipCRM™!**