

# EliteAgent by zipLogix™

## Quick Tips



**eliteAgent**   
by zipLogix™



Welcome to EliteAgent by zipLogix™, our newest product giving you, as the agent or administrator, an exceptional upgrade to a premier technology suite for transaction management.

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Revision Date 1.24.2019



## Products included in the EliteAgent by zipLogix™ bundle:

- zipForm Record-Connect™: Auto-populate transaction information with public record data.
- ListFlash®: Broadcast new listing transactions in zipForm® Plus and on social media.
- zipForm® Mobile: Access transactions and do work from anywhere, at any time.
- Unlimited zipLogix Digital Ink® e-Signatures with unlimited CyberSafe Protection
- zipForm® Plus Transaction Coordinator
- HUD Form Library
- Addenda Form Library

The banner features a blue background with a vertical sidebar on the left containing seven circular icons: a star, a house with a dollar sign, a lightning bolt, a hand holding a pen, a shield, a smartphone, and a house with a plus sign. The main text area on the right includes the 'zipForm Plus' logo in the top left and the 'eliteAgent by zipLogix' logo in the top right. The central text reads '24 hours a Day!' and '7 Days a Week!' in white, followed by 'EliteAgent Customer Care by zipLogix™' in a larger white font, and 'Experience Priority Support!' in a smaller white font below it.

EliteAgent by zipLogix™ Customer Care enables you to service your clients faster, with a dedicated VIP call line that puts your needs first.

Our team of experts are on call 24 hours a day, seven days a week, to extend EliteAgent by zipLogix™'s priority treatment so that you can keep your workflow moving quickly and seamlessly, right up until closing.



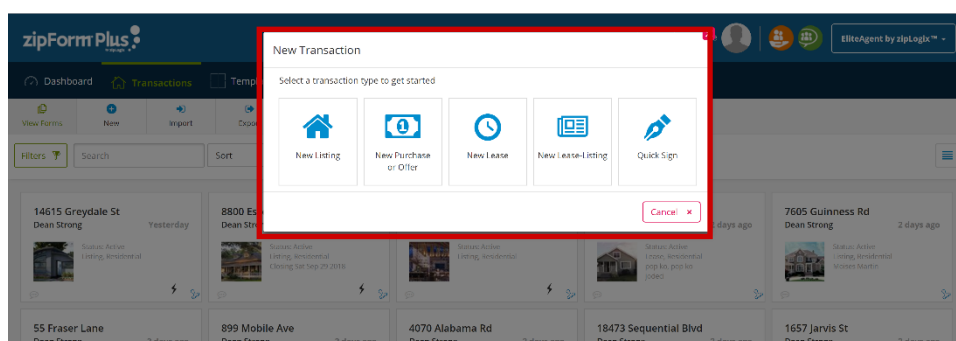
## zipForm Record-Connect™



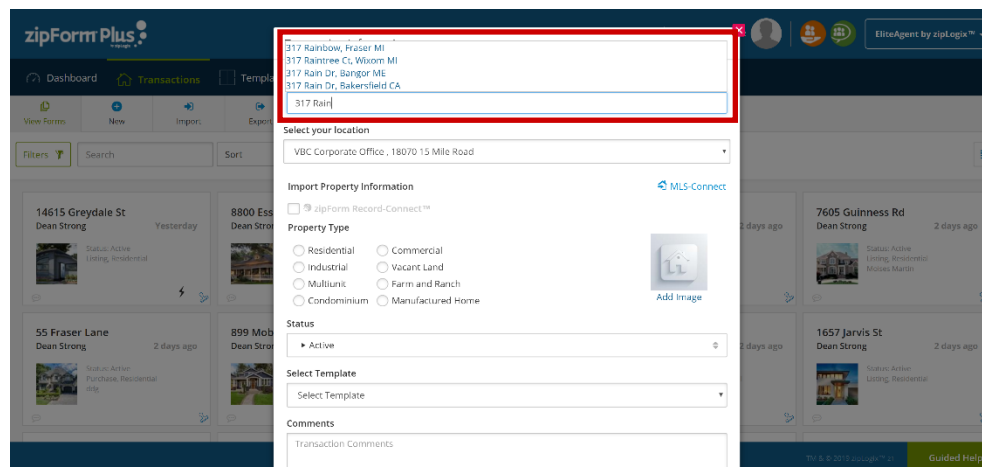
With zipForm Record-Connect™, you may auto-populate more than 30 data fields at record speed from a national public tax records database directly into your transactions.

For a complete guide on using zipForm Record-Connect™ inside zipForm® Plus, click [here](#). To watch the video, click [here](#).

1. Once signed into zipForm® Plus, from the Transaction home landing page, click the “New” button on the tool bar, then select the appropriate transaction type on the launch pad.



2. A “Transaction Information” window will display, where you may type in the property’s street address. SmartyStreets technology will assist you in targeting the proper location.





3. Once you see the desired address, click to select it. This will automatically activate the zipForm Record-Connect™ link, which you may select by clicking the box.

4. Choose the "Property Type," and even add an optional template and/or additional comments, if desired



5. Click the “Save” button at the bottom, and you will be immediately launched into the “Transaction Summary” screen.

6. After a brief pause, the system will display the zipForm Record-Connect™ window, with the accurate property information. Within this window, type in the name of the seller.



**Note:** At the bottom of the window, you may select the option to allow zipForm Record-Connect™'s imported data to replace any already existing data in the transaction. If you reply "No," zipForm Record-Connect™ data will only auto-populate data fields that are not already set. Once you make your selection, the appropriate fields will auto-populate.

1. Click the "Save" button to lock in the entries. Now, open up any document added to the transaction, such as a Cover Sheet. Information from zipForm Record Connect™ will auto-populate this document.

**Note:** The other three places the "Record Connect" Link can be found is in the Documents page, Inside of the Document itself, and in our Transaction Summary Screen next to the Property Summary heading.



ListFlash®



ListFlash® for individual agents creates the opportunity to close deals faster by broadcasting the latest listings to your network across various platforms, for immediate offers on hot properties.

For a complete guide on using ListFlash® inside zipForm® Plus, click [here](#). To watch the video, click [here](#).

1. Create a new ListFlash® by, first, creating a new transaction and categorizing it to your preferences.

**zipForm Plus**

Dashboard Transactions Templates

View Forms New Import Export

Filters Search Sort

317 Rainbow Dean Strong 2 mins. ago

14615 G Dean Stro

**New Transaction**

Select a transaction type to get started

New Listing New Purchase or Offer New Lease New Lease-Listing Quick Sign

Cancel

**zipForm Plus**

Dashboard Transactions Templates

View Forms New Import Export

Filters Search Sort

317 Rainbow Dean Strong 2 mins. ago

14615 G Dean Stro

7605 Guinness Rd Dean Strong 2 days ago

55 Frase Dean Stro

5461 Jemella Ave Dean Strong 2 days ago

18473 Sequential Blvd Dean Strong 2 days ago

**Transaction Information**

Name: 143 Hopper

Select your location: VBC Corporate Office, 18070 15 Mile Road

Import Property Information

☐ zipForm Record-Connect™

Property Type: ☒ Residential ☐ Commercial ☐ Industrial ☐ Vacant Land ☐ Multiunit ☐ Farm and Ranch ☐ Condominium ☐ Manufactured Home

Status: Active

Select Template: Select Template

Templates Automatically Applied by Admin

Template Name	Scope	Checklists
NEW TEMP 2	Global	true
test apply template	Global	false

EliteAgent by zipLogix™

Guided Help





2. Click "Save" to create the transaction. From there, you will be launched immediately into the "Transaction Summary" screen. From here, click on the ListFlash® button at the top of the summary, and fill out all applicable fields. You may be as detailed as desired on the property features.

The screenshot shows the zipForm Plus interface. The top navigation bar includes 'Dashboard', 'Transactions', 'Templates', 'Tasks', 'Contacts', 'Partners', and 'Help'. The 'ListFlash®' button is highlighted in the top right. The 'Property Summary' section is outlined in red, showing fields for MLS Number, Street Address (143 Hopper), City (Fraser), State (MI), and Zip (48026). The 'ListFlash®' button is also highlighted in the top right of the summary section.

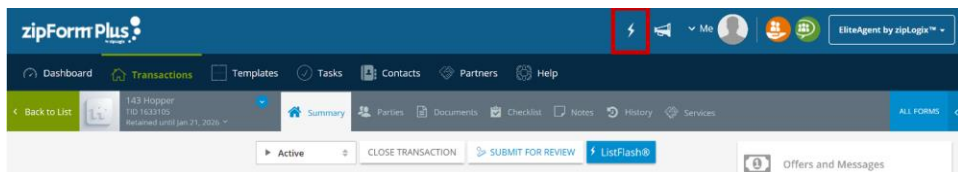
3. Once finished, simply **save** to retain your information or **save and publish** when ready to broadcast your new ListFlash®!

The screenshot shows the listFlash® form. The 'Property Location' section includes fields for Address (143 Hopper), City (Fraser), State (MI), and Zip (48026). The 'Property Details' section includes fields for Price (300,000.00), Sqft approx, Beds, Baths, Year Built, Lot size approx, and Lot size units. The 'Description' section contains the text: 'Lovely, modern colonial-style house with backyard, finished basement, three bedrooms, and two and a half baths. Clean, safe neighborhood. Great for families!'. The 'Agent Information' section is partially visible. The 'Save' button is highlighted in red at the bottom right.

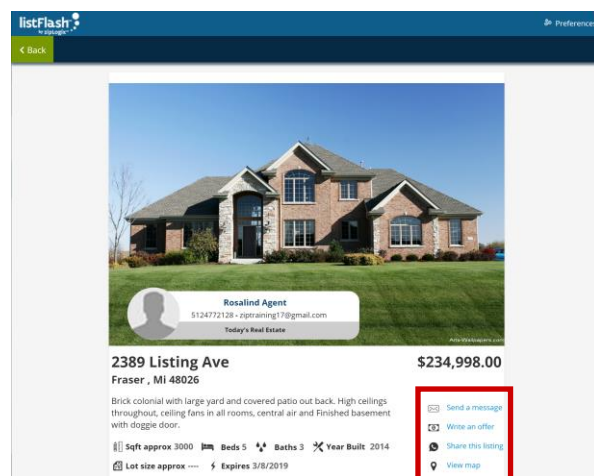
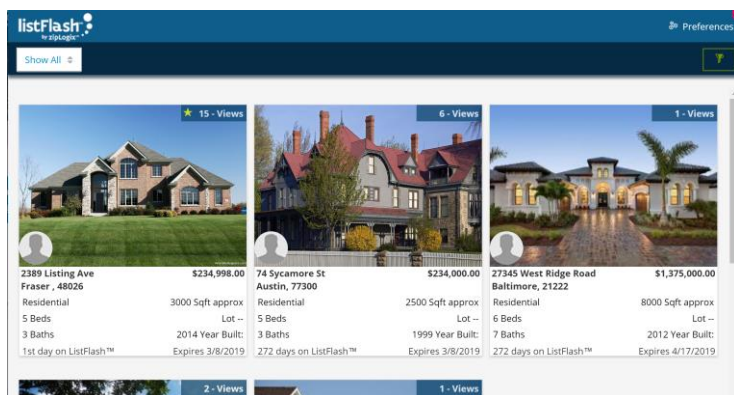
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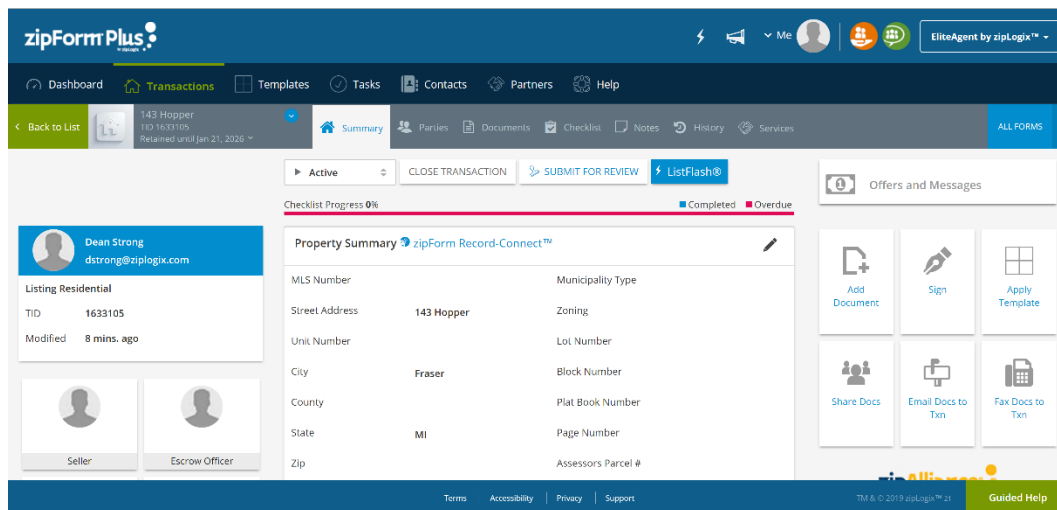
4. EliteAgent by zipLogix™ allows users to view and sort published ListFlash® properties by clicking on the lightning bolt icon at the top of the transaction landing page.



5. Further information shows where you are able to contact the agent directly, share the listing, and even check out the Map view to see where it is located



6. As the creator of this ListFlash®, you have the ability to launch back into the actual listing transaction and make whatever adjustments you desire.





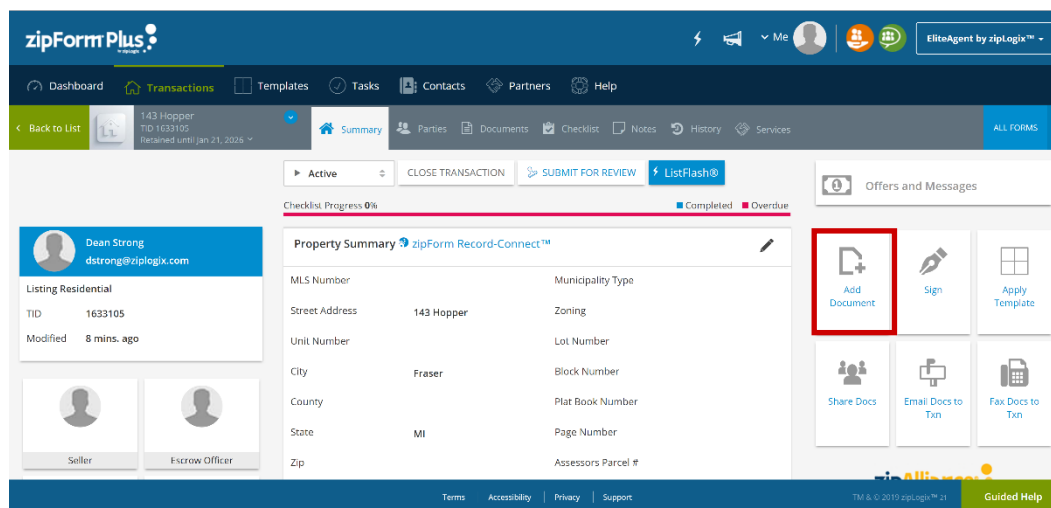
## zipLogix Digital Ink®



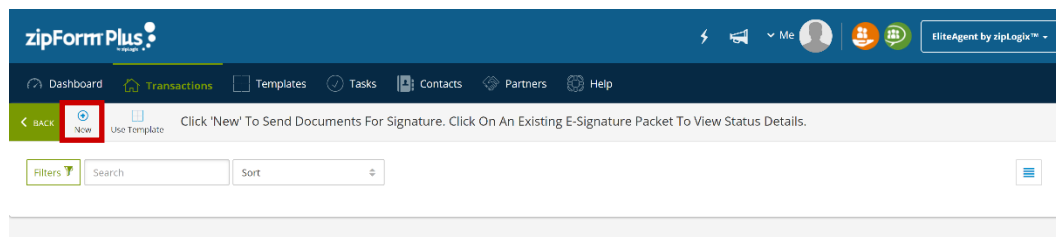
zipLogix Digital Ink® makes the signing process easier and more secure. Digital signatures within your transactions stay safe, along with all of your secure documents and data. EliteAgent by zipLogix™ offers added, CyberSafe protection to contracts submitted for electronic signatures. Protect your zipForm® Plus accounts, and your client's secure information from unauthorized access with two layers of user authentication. Secure authentication ensures that only the intended party will be able to partake in the e-Signing session.

For a complete guide on using zipLogix Digital Ink® inside zipForm® Plus, click [here](#). To watch the video, click [here](#).

1. From the "Transaction Summary" screen, select the "Sign" icon on the far right of the Launchpad.

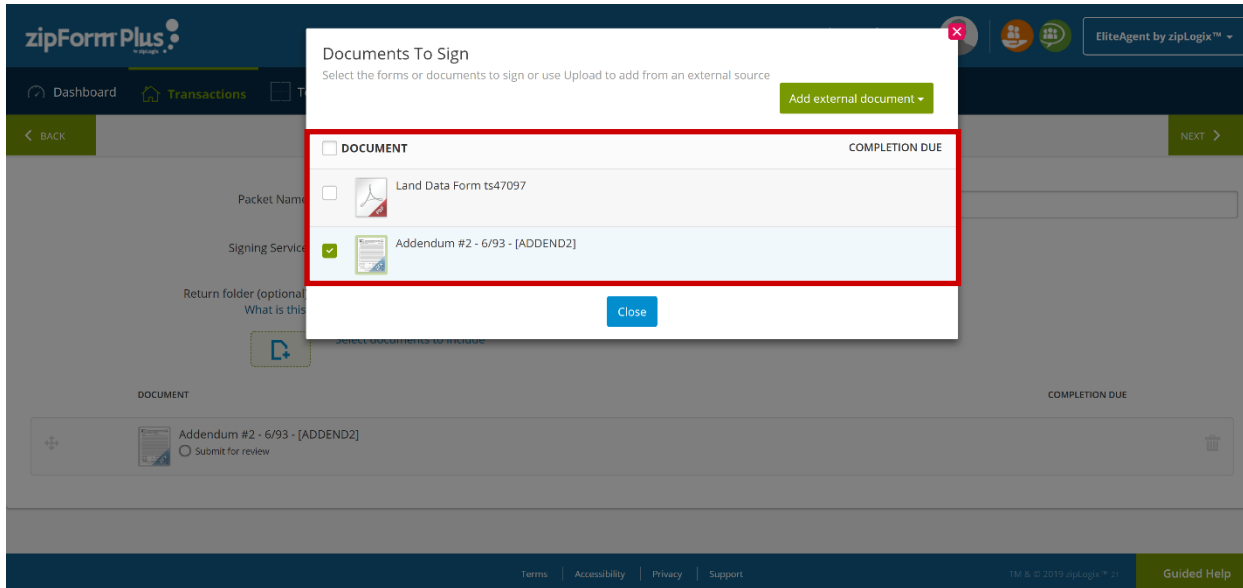


2. Click the "New" button.

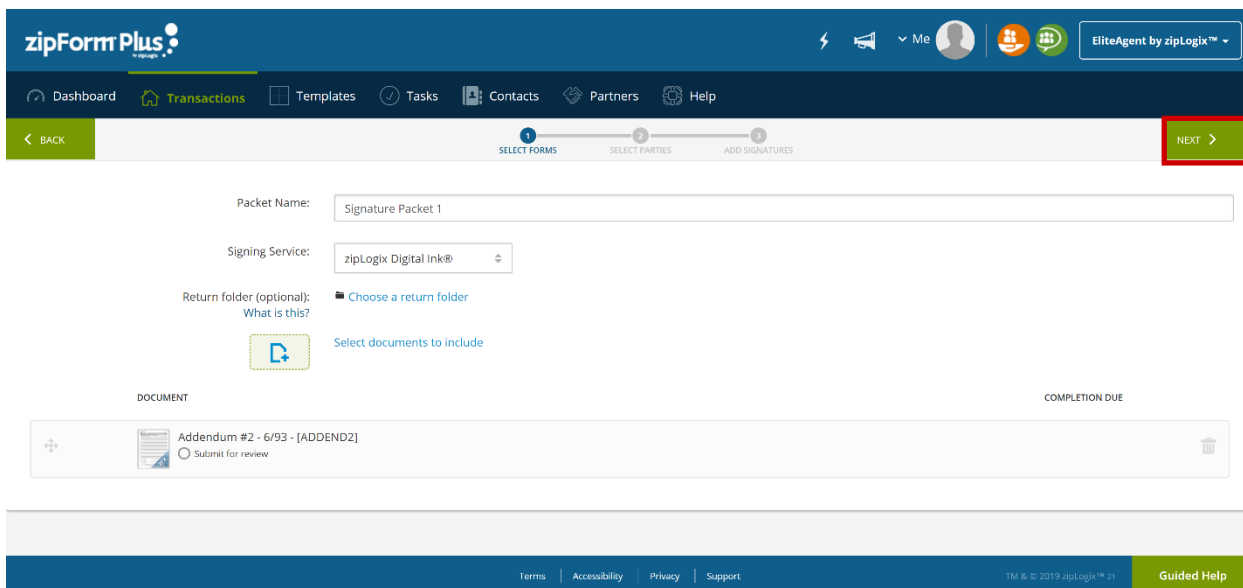




3. Next, select the documents you have already added to your transaction or external documents.



4. This launches you into step one of the e-Sign packet creation process, where you may customize to your preferences, then click the “Next” button, on the far right.





5. This will take you into step two of the e-Sign packet creation process, and allow you to add parties created within the transaction and/or a wealth of other contact sources if needed. Once you have selected the party, and filled in the Full Name, Role and Email Address, select their box, then click on Add Signer and click "Close."

	FIRST NAME	MIDDLE NAME	LAST NAME	ROLE	EMAIL	COMPANY
<input checked="" type="checkbox"/>	Sally		McSeller	Seller/Buyer 1	smcsell@gmail.com	
<input type="checkbox"/>				Seller/Buyer 3		
<input checked="" type="checkbox"/>	Sam		McSeller	Seller/Buyer 2	samcsell@gmail.com	
<input type="checkbox"/>				Seller/Buyer 4		
<input type="checkbox"/>				Manager		
<input type="checkbox"/>	Jon		Lee	Broker		

6. In this step, also notice that the CyberSafe option is automatically defaulted "On." With SMS authentication in the "On" position, you may simply enter the mobile phone number of the signer.

	NAME / ROLE	EMAIL	CC
1	Sally McSeller Seller/Buyer 1	smcsell@gmail.com	<input checked="" type="checkbox"/>
2	Sam McSeller Seller/Buyer 2	samcsell@gmail.com	<input checked="" type="checkbox"/>

**\*CYBERSECURITY PROTECTION**

SMS Authentication On

SMS Authentication On



7. Proceed to the third step of the e-Signature packet creation process by, again, clicking “Next” on the far, right side of this page.

zipForm Plus

Dashboard Transactions Templates Tasks Contacts Partners Help

BACK SELECT FORMS SELECT PARTIES ADD SIGNATURES NEXT

CC LIST GMT Time Zone

Add Signers

☒ SIGNING ORDER

	NAME / ROLE	EMAIL	CC	SMS Authentication On	
1	Sally McSeller Seller/Buyer 1	smcsell@gmail.com	<input checked="" type="checkbox"/>	SMS Authentication On	2481912748
2	Sam McSeller Seller/Buyer 2	samcsell@gmail.com	<input checked="" type="checkbox"/>	SMS Authentication On	Mobile phone number

Terms Accessibility Privacy Support TM & © 2019 zipLogix™ 21 Guided Help

8. Your document is now ready to be sent for signing. Click the “Send” button in the top, right- hand corner of the page. This will send your contracts out for e-Signing, as well as automatically generate a private, one time use code your signer will receive via text message.

143 Hopper - Signature Packet 1

BACK SELECT FORMS SELECT PARTIES ADD SIGNATURES SEND

Sally McSeller  
Seller/Buyer 1  
smcsell@gmail.com

Addendum #2 - 6/93

Save Quit

Zoom

Document Fields

34. \_\_\_\_\_

35. \_\_\_\_\_

36. \_\_\_\_\_

37. \_\_\_\_\_

38. \_\_\_\_\_

39. \_\_\_\_\_

40. \_\_\_\_\_

41. \_\_\_\_\_

42. The undersigned agrees to the additional terms and conditions and acknowledges receipt of a copy hereof.

43. Sally McSeller MM/dd/yyyy

44. ☐ Seller ☐ Buyer MO/DA/YR

45. ☐ Landlord ☐ Tenant MO/DA/YR

46. Sam McSeller MM/dd/yyyy

47. ☐ Seller ☐ Buyer MO/DA/YR

48. ☐ Landlord ☐ Tenant MO/DA/YR

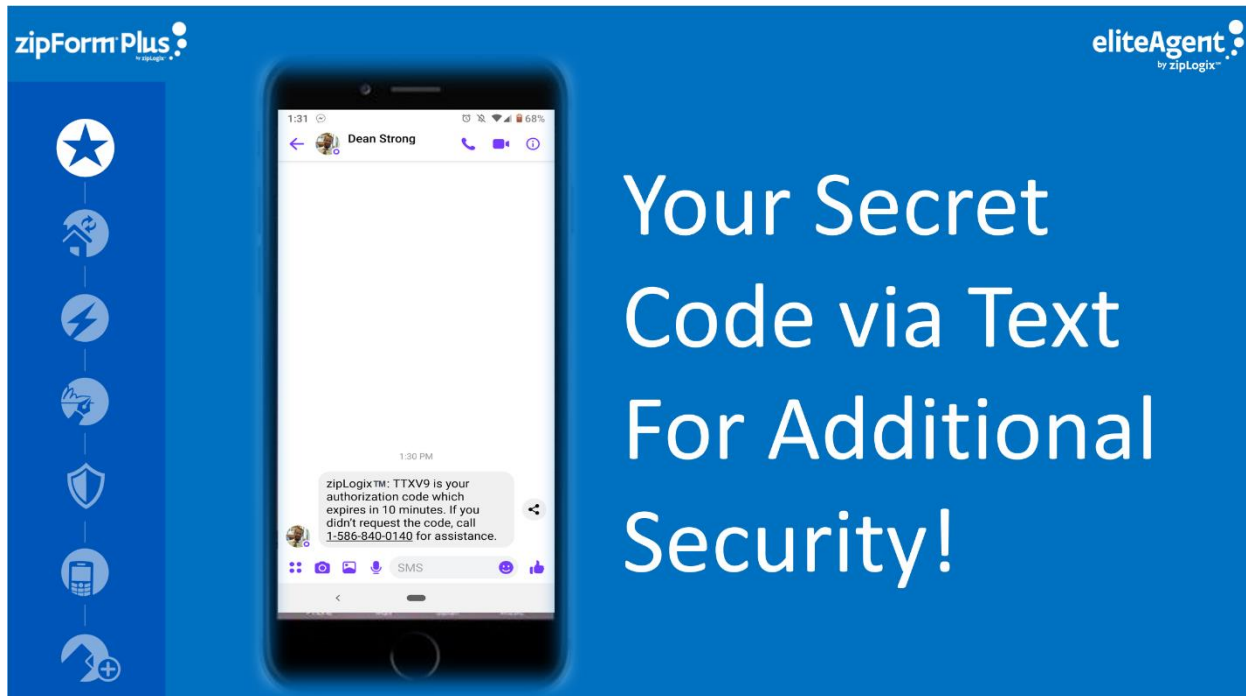
49. \_\_\_\_\_

50. \_\_\_\_\_

This document is for D... It does not represent...



9. Once your signers have received your email containing their documents for e-Signing, and have clicked on the invite, they will be required to enter that secret code prior to the process of creating or entering their zipLogix Digital Ink® credentials.



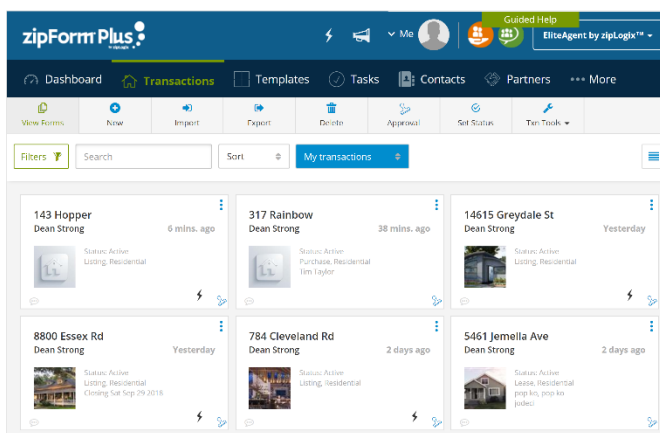


## zipFormMobile®

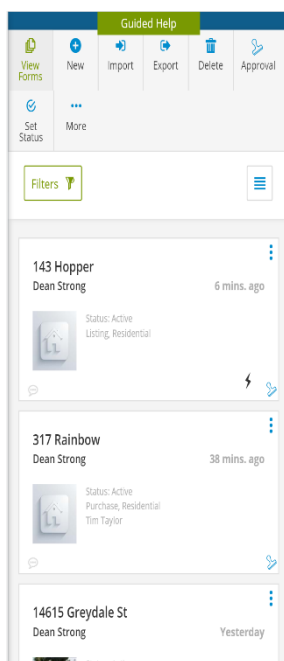


Your EliteAgent by zipLogix™ account package also includes zipForm® Mobile. All capabilities stay the same on your mobile device as on your laptop or desktop. Sign in as you normally do on your mobile device, and our device-responsive use interface will give you a clear and condensed alternate view of your EliteAgent by zipLogix™ features.

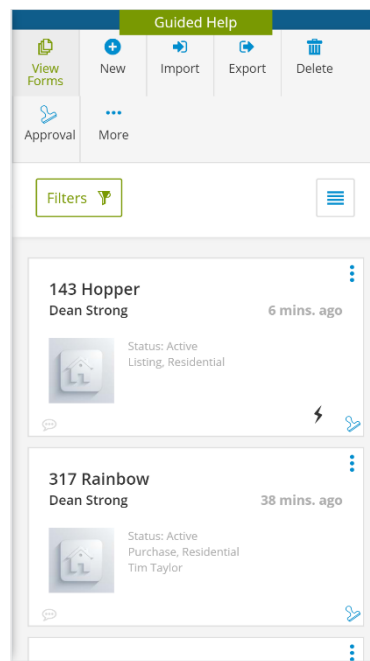
## iPad Pro



## Pixel 2 XL



## Galaxy S5





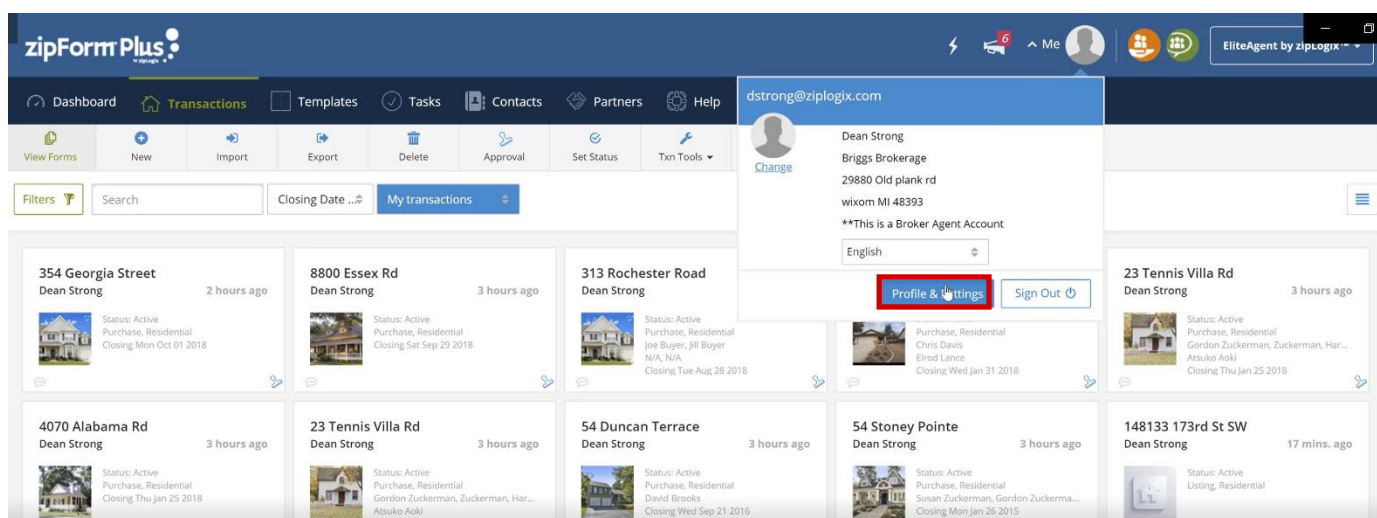


## zipForm® Plus Transaction Coordinator

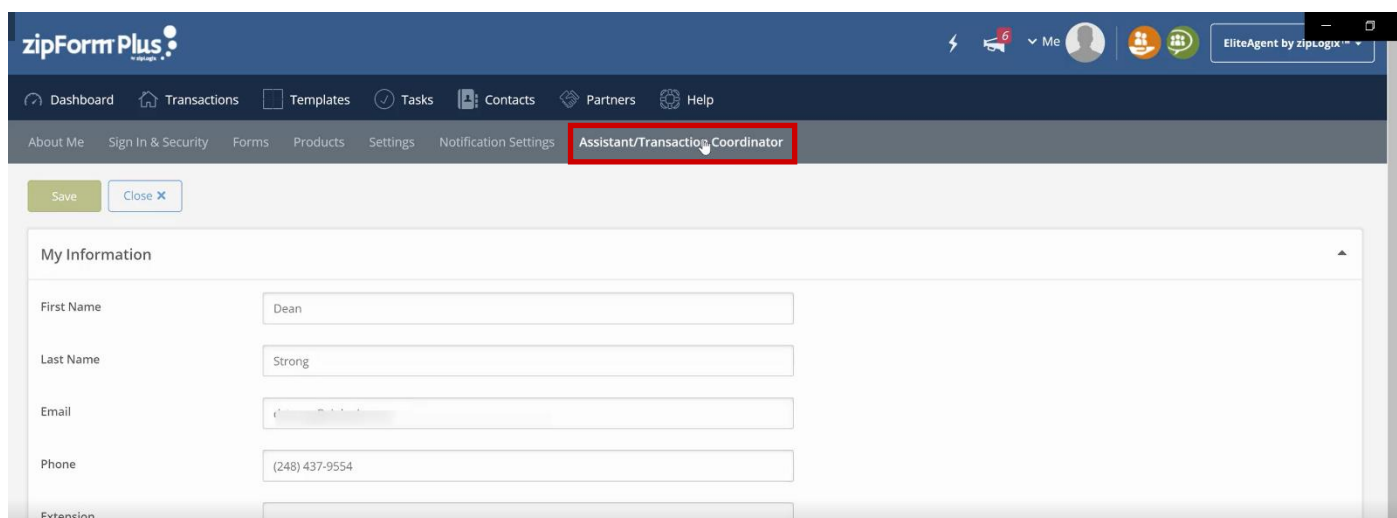
Empower your assistant to keep deals moving on your behalf. This exclusive zipForm® seat grants your Assistant Transaction Coordinator customized access to transaction information at your discretion.

For Agents:

1. To set up a new Transaction Coordinator, click on the “Me” dropdown, then select “Profile & Settings.”

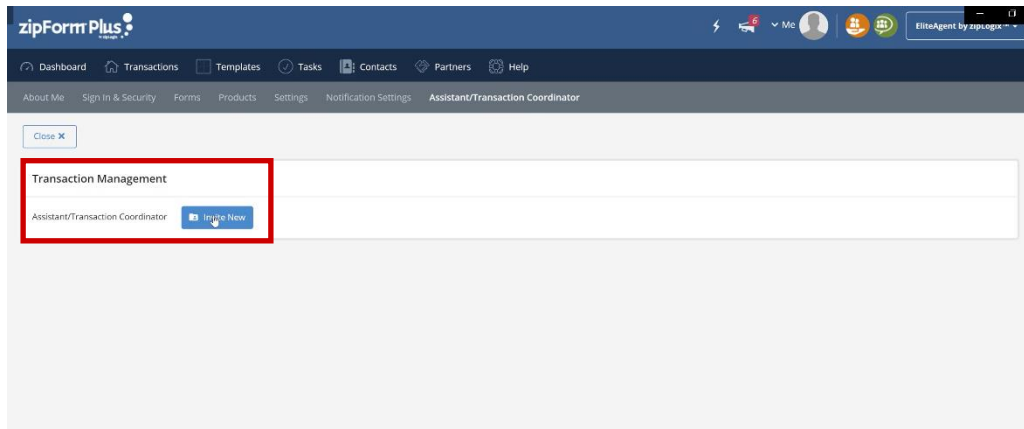


2. Once under Profile & Settings, select the “Assistant/Transaction Coordinator” tab.





3. Under “Assistant/Transaction Coordinator,” click the “Invite New” button.



4. In the window which appears, follow the prompts to add in basic information for your new Assistant/Transaction Coordinator, including first and last name, username, email, phone, and any additional information.

Establish permissions for the new Assistant/Transaction Coordinator below, then click “Invite,” at the bottom of the window. This will generate an email to the new Transaction Coordinator.

Email Address\*

Phone

Message

Permissions

Working with Agent's Transactions	Working on Transaction Documents	Agent's Templates	E-Signatures
<input checked="" type="checkbox"/> Create Transaction	TC can:	<input checked="" type="checkbox"/> Can Create	<input checked="" type="checkbox"/> Can Prepare and Send
<input checked="" type="checkbox"/> Edit Transaction Details	<input checked="" type="checkbox"/> Add Documents/Forms	<input checked="" type="checkbox"/> Can Edit	<input checked="" type="checkbox"/> View Contacts
<input checked="" type="checkbox"/> Allow Collaborative Form Editing	<input checked="" type="checkbox"/> Edit Documents/Forms		<input checked="" type="checkbox"/> Corporate contacts
<input type="checkbox"/> Can Mark for Approval	<input type="checkbox"/> Delete Unsigned Documents		<input checked="" type="checkbox"/> Office contacts
<input checked="" type="checkbox"/> Can Mark and Grant Approval	<input type="checkbox"/> Delete Signed Documents		<input checked="" type="checkbox"/> Transaction contacts
<input checked="" type="checkbox"/> Override Enforced Documents and Tasks			

Security

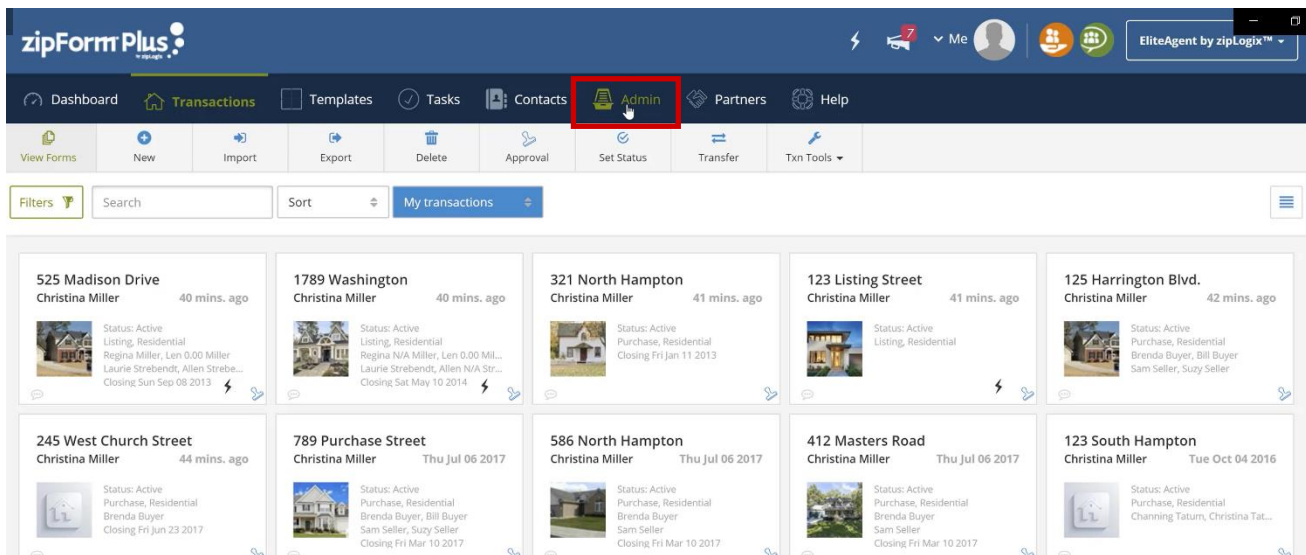
Two-Factor Authentication ☐ OFF

**Note:** Please note that only one Assistant/Transaction Coordinator may be assigned to your EliteAgent by zipLogix™ account at any given time. In some instances, an Assistant/Transaction Coordinator may not have as many permissions than the Agent s/he is assigned to. This is subject to the discretion of the Broker Administrator. If approval by the Broker Administrator is not required, the Assistants/Transaction Coordinators will receive their invitations right away, with instructions on how to finish setting up the new account. An agent may remove and/or add an Assistant/Transaction Coordinator from the account as often as necessary.

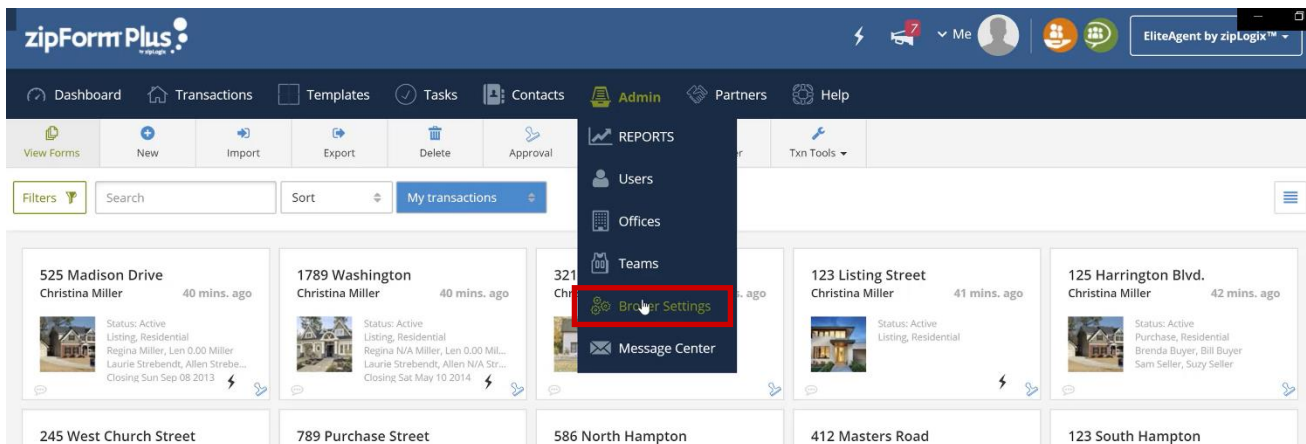


For Administrators in a zipForm® Plus Multi-User account (Brokerage account).

1. Sign into your Broker Admin. account, and click on the “Admin” tab on the Navigation Bar.



2. From the “Admin” tab, select “Broker Settings.”





3. Enable preferences for the new Transaction Coordinator under the “Transaction Management” header.

The screenshot displays the settings interface for EliteAgent by zipLogix. It features several sections with toggle switches:

- Sharing**: Form Editing (On)
- Transaction Management** (highlighted with a red box):
  - Agent can Invite Assistant/Transaction Coordinator (On)
  - Require Approval to Assign Assistant/Transaction Coordinator (Off)
  - Set Permission Limits (Off)
- Transaction**:
  - Delete Transaction (On)
  - Edit Note(s) (On)
  - Delete Note(s) (On)
- Document**: (Section header, no toggles visible)

Ensure you get the most out of your transaction management experience with Elite Agent by zipLogix™!

Don't forget to take advantage of your V.I.P. access to our support experts for additional questions or concerns, and make full use of our high-velocity training.

**Additional Resources:**

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

[www.youtube.com/ziplogix](https://www.youtube.com/ziplogix)

[www.ziplogix.com/support](http://www.ziplogix.com/support)

[www.ziplogix.com/training](http://www.ziplogix.com/training)

Thank You for choosing EliteAgent by zipLogix™!