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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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

EliteAgent by zipLogix™ Customer Care by zipLogix™
Experience Priority Support!

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.
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® 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.
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.

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

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.
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.

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.
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.
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.

**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.

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
www.youtube.com/ziplogix
www.ziplogix.com/support
www.ziplogix.com/training

Thank You for choosing EliteAgent by zipLogix™!