



Establishing Tasks with zipTMS®

1. Begin by signing in to zipForm® Plus at www.zipformplus.com, or through your Association, MLS, or Brokerage site, if you have single sign on.

The login screen for zipForm Plus by zipLogix. It features a sign-in form with fields for Username and Password, a Sign In button, and links for forgot username/password and creating a new account. There is also an option to sign in with a NAR.realtor/Username and Password.

2. From inside of zipForm® Plus, click on "Tasks" on your Navigation Bar.

The screenshot shows the zipForm Plus interface with the "Tasks" tab selected in the navigation bar. Below the navigation bar, there are filters for "In progress" and "Completed" tasks. The main table displays a list of tasks with columns for STATUS, TASK NAME, TRANSACTION NAME, REQUIRED, and DUE DATE.

STATUS	TASK NAME	TRANSACTION NAME	REQUIRED	DUE DATE
In progress	verify clear to close Dean Strong	978 Signal St	Yes	
Completed	walk thru Dean Strong	978 Signal St	Yes	

3. The "Tasks" view allows you to view all your tasks, excluding those with an "Inactive" or "Closed" status. Some optional views of your tasks are available, such as a "Checklist view" and a "Calendar view."

This screenshot shows the zipForm Plus interface with the "Tasks" tab selected. The "Calendar" and "Checklist" views are highlighted in the navigation bar. The main table displays a list of tasks with columns for STATUS, TASK NAME, TRANSACTION NAME, REQUIRED, DUE DATE, DOCUMENTS, and RESPONSIBLE PARTY.

STATUS	TASK NAME	TRANSACTION NAME	REQUIRED	DUE DATE	DOCUMENTS	RESPONSIBLE PARTY
In progress	verify clear to close Dean Strong	978 Signal St	Yes		Add	
Completed	walk thru Dean Strong	978 Signal St	Yes		Add	



- The “Urgent Tasks” feature allows you to see any overdue tasks you may have in a pop-out window. To close your Urgent Tasks drop-down, click the red “X” in the top right corner.

The screenshot shows the zipForm Plus interface with the 'Urgent Tasks' pop-out window open. The window has a red 'X' icon in the top right corner. The table inside the window lists tasks with columns: STATUS, TASK NAME, TRANSACTION NAME, REQUIRED, DUE DATE, DOCUMENTS, and RESPONSIBLE PARTY. The tasks listed are:

STATUS	TASK NAME	TRANSACTION NAME	REQUIRED	DUE DATE	DOCUMENTS	RESPONSIBLE PARTY
In progress	Walk thru Dean Strong	899 Mobile Ave	No	▲ Oct 25, 2018	Add	
Not started	Verify Clear to Close Dean Strong	SAMPLE TRANS 1	Yes	▲ Jan 02, 2019	Add	
Not started	Final Walk thru Dean Strong	SAMPLE TRANS 1	Yes	▲ Jan 04, 2019	Add	

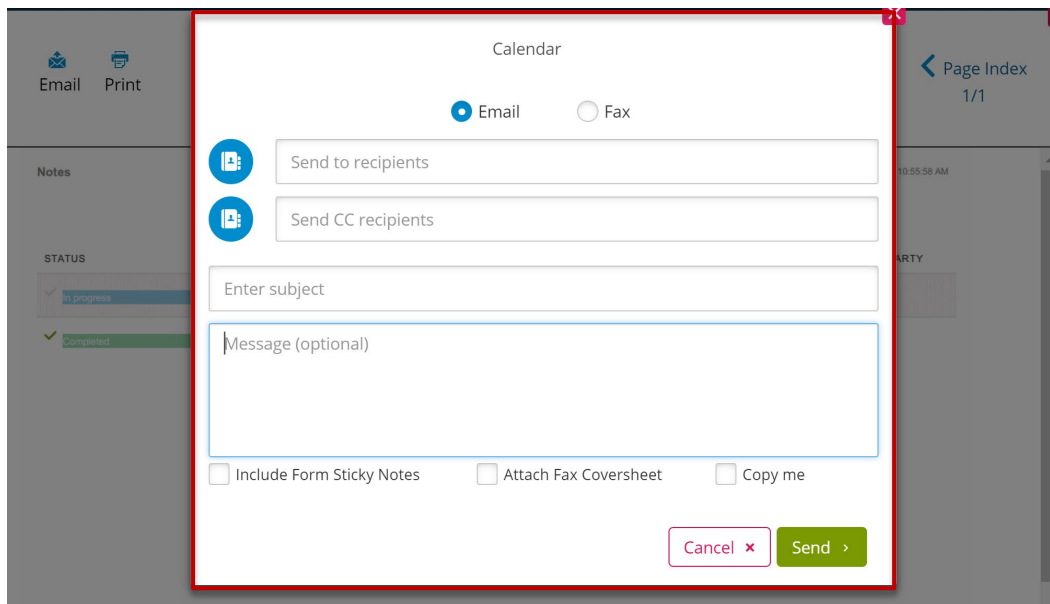
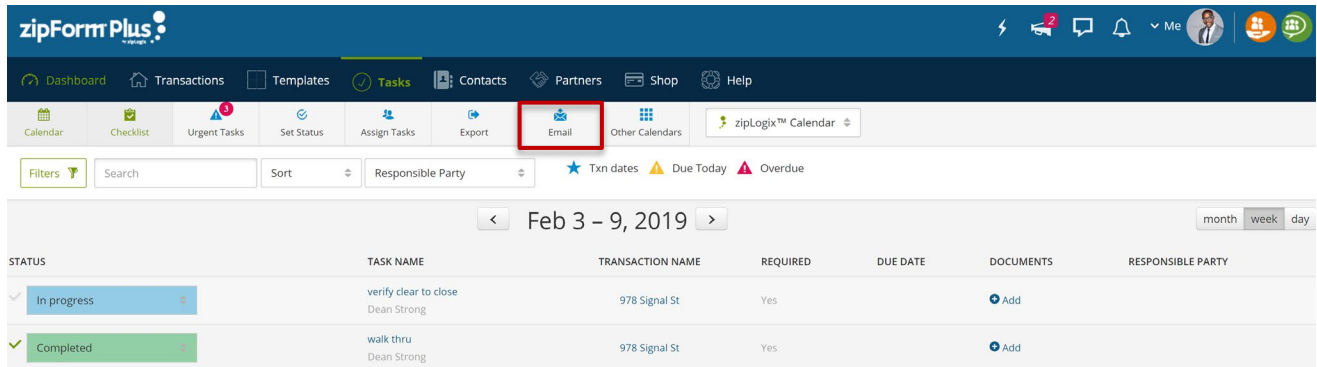
- The “Set Status” icon allows you to set the status of your tasks in bulk. After you have selected the status in the drop-down, simply click the box to the left of each selected task.

The first screenshot shows the zipForm Plus interface with the 'Set Status' feature. A dropdown menu for 'Select Status' is open, showing options: Not started, In progress, Needs review, Not applicable, and Completed. The interface also shows a date range of 'January 1, 2019' and a table of tasks.

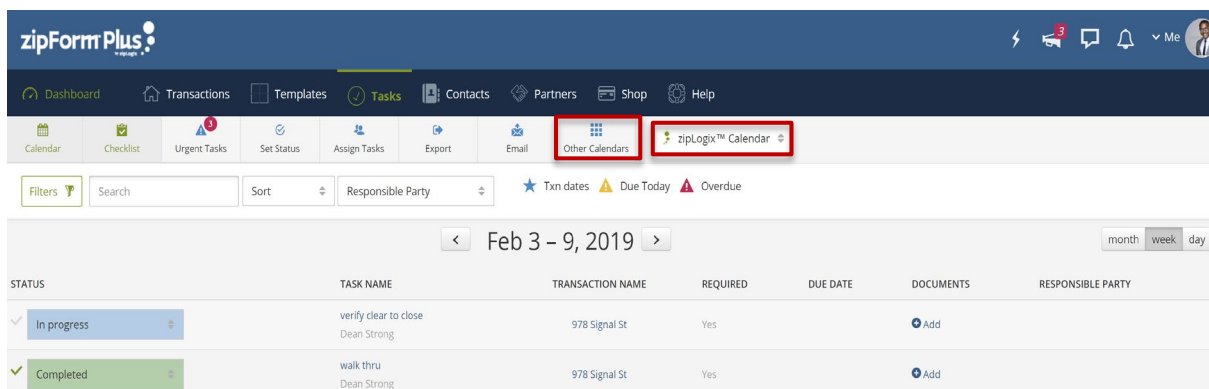
The second screenshot shows the same interface with a date range of 'Feb 3 - 9, 2019'. The table of tasks is updated, and checkboxes are visible next to the 'In progress' and 'Completed' status boxes, indicating that the status can be set for multiple tasks at once.



6. The “Email” feature allows you to email tasks outside of zipForm® Plus.

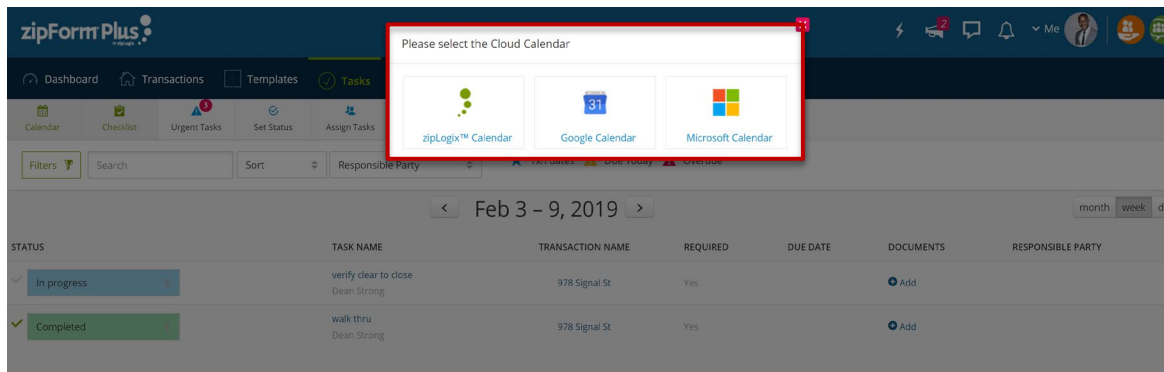


7. The “Other Calendars” icon and the “zipLogix™ Calendar” dropdown allows you to utilize Cloud integration to integrate outside, cloud-based calendar tasks with your zipLogix™ tasks.

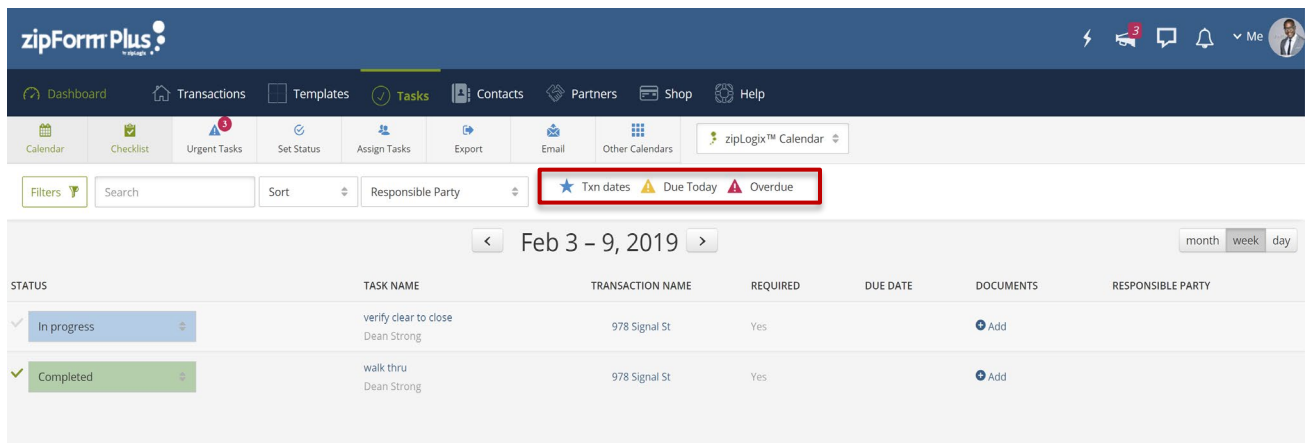




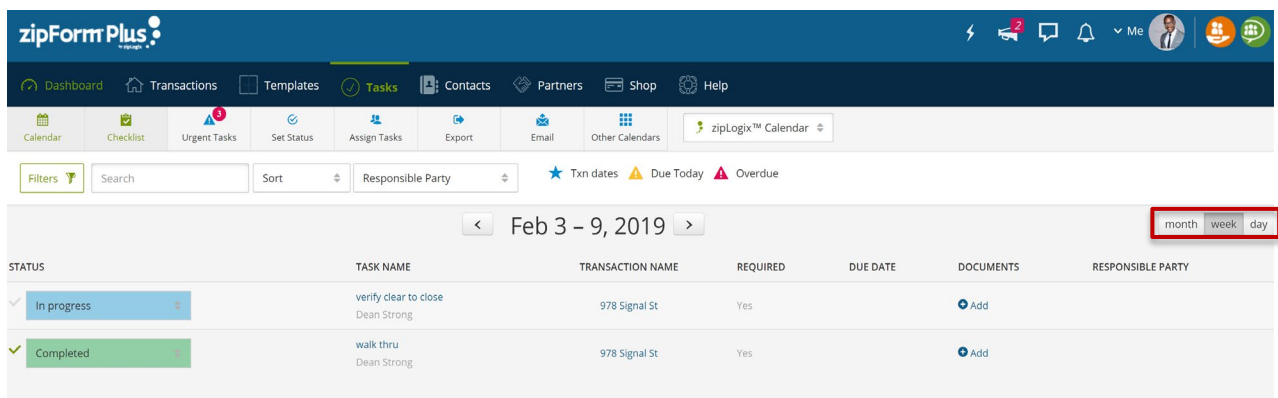
8. Select the cloud-based Calendar of your choice



9. Your icon key shows you your “Transaction Dates,” your “Tasks Due Today,” and your “Tasks Overdue” including “system generated” due dates.



10. You can also view your Tasks based on a “Month,” “Week,” or a “Single Day.”





11. To edit a task, click on the task and the edit task window will appear. After making the necessary changes, click “Save.”

The screenshot shows the zipForm Plus interface. At the top, there's a navigation bar with icons for Dashboard, Transactions, Templates, Tasks, Contacts, Partners, Shop, and Help. Below this is a secondary navigation bar with icons for Calendar, Checklist, Urgent Tasks, Set Status, Assign Tasks, Export, Email, and Other Calendars. A search bar and filters are also present. The main area displays a table of tasks for the date range Feb 3 - 9, 2019. The table has columns for STATUS, TASK NAME, TRANSACTION NAME, REQUIRED, DUE DATE, and DOCUMENTS. Two tasks are listed: 'verify clear to close' (In progress) and 'walk thru' (Completed). The 'verify clear to close' task is highlighted with a red box. Below the table, the edit task window for '978 Signal St > pre closing > phase 1' is shown. It includes fields for Task Name, Due Date (Relative, 8 Days Before Closing Date), Required (Yes), Responsible Party (Unassigned), Status (In progress), and a Documents section with an 'Attach Documents' button. The 'Save' button is highlighted in green.

STATUS	TASK NAME	TRANSACTION NAME	REQUIRED	DUE DATE	DOCUMENTS
In progress	verify clear to close Dean Strong	978 Signal St	Yes		Add
Completed	walk thru Dean Strong	978 Signal St	Yes		Add

978 Signal St > pre closing > phase 1
Dean Strong

Task Name
verify clear to close

Due Date
☐ None ☐ Fixed ☒ Relative
8 Days Before Closing Date

Required:
☒ Yes

Responsible Party
Unassigned

Status
In progress

Notify responsible party when due ☐ No

Documents
Attach Documents

Description

Delete Cancel Save

12. To add a document to a task, click the “Attach Documents” icon and a pop-up window will appear enabling you to browse for a file or create a placeholder for a future document pertinent to that task.

The screenshot shows the same task list as before, but with the 'Attach Documents' button highlighted by a red box. Below the table, the edit task window for '978 Signal St > pre closing > phase 1' is shown. It includes fields for Task Name, Due Date (Relative, 8 Days Before Closing Date), Required (Yes), Responsible Party (Unassigned), Status (In progress), and a Documents section with an 'Attach Documents' button. The 'Attach Documents' button is highlighted with a red box. Below it, there are options to 'Browse for new document' and 'Create placeholder'. The 'Save' button is highlighted in green.

STATUS	TASK NAME	TRANSACTION NAME	REQUIRED	DUE DATE	DOCUMENTS
In progress	verify clear to close Dean Strong	978 Signal St	Yes		Add
Completed	walk thru Dean Strong	978 Signal St	Yes		Add

978 Signal St > pre closing > phase 1
Dean Strong

Task Name
verify clear to close

Due Date
☐ None ☐ Fixed ☒ Relative
8 Days Before Closing Date

Required:
☒ Yes

Responsible Party
Unassigned

Status
In progress

Notify responsible party when due ☐ No

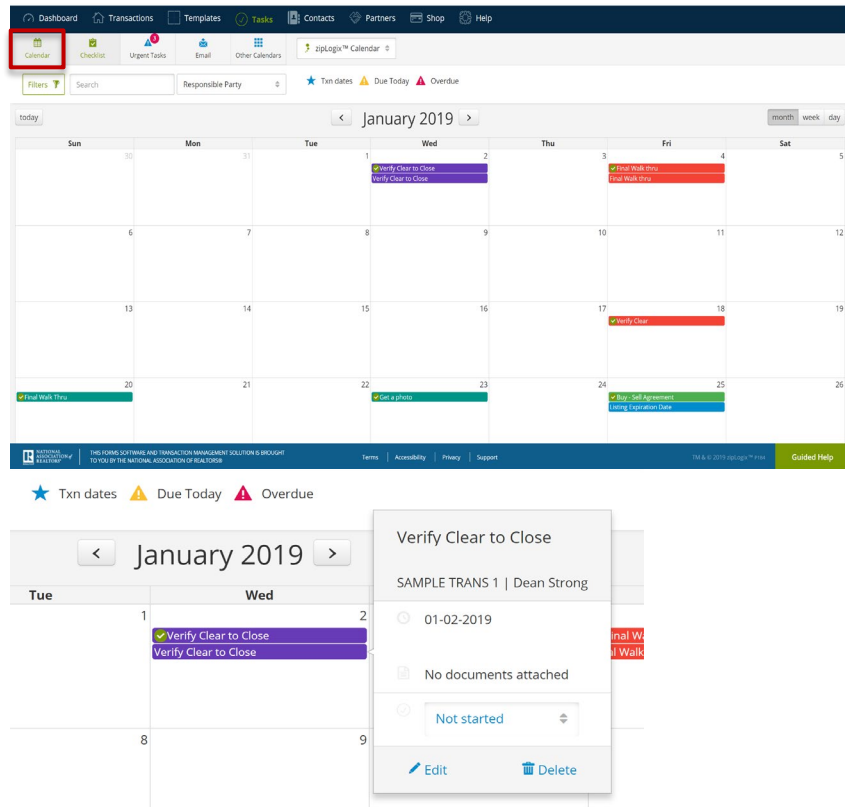
Documents
Attach Documents
Browse for new document
Create placeholder

Description

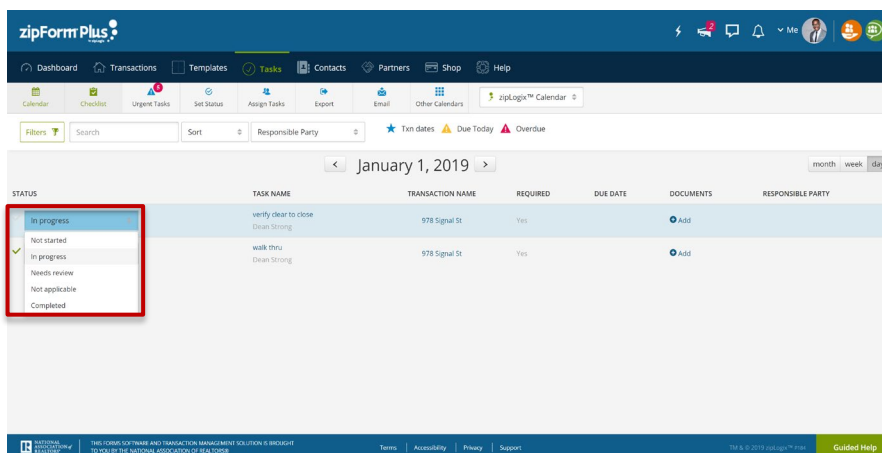
Delete Cancel Save



- Similar to the “Checklist View” for Tasks, your “Calendar View” allows you to view your Calendar in either a monthly view, a weekly view, or a daily view. To edit a Task in “Calendar View,” click on the Calendar icon in the top left hand corner. Once in the Calendar View, you may simply hover over the task, where the “Edit Task” window will appear.



- In the “List View,” to change the “Status” of a particular task, use the drop-down menu. Your options include, “Completed,” “Not Applicable,” “Needs Review,” “In Progress,” and “Not Started.”



Thank you for using zipTMS®!