Exploring the Agent Dashboard inside zipForm® Plus!

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.

2. Once logged into your zipForm® Plus account. To access the Agent Dashboard, click on the Dashboard Tab on the Navigation Bar.
3. On the Agent Dashboard you have access to analytical and operational metrics along with a number of hyperlinks and widgets that allow you to explore more detailed information about a particular category. In the upper-left hand corner of the Dashboard is Quarterly Sales, Commission, Closed Txns, and Fell Through. This data is generated by transactional data entries.

4. Data entries that are required are Purchase price, Commission, Closed Date, and the Transaction to be set in a “Closed” status.
5. To view a more detailed breakdown of a particular category, click on the report icon.

6. The report screen allows you to not only view more details about the chosen category, but also, run reports, export reports to a CSV or Excel spreadsheet. You can also change the report results by clicking the categories drop down.
7. In upper-right of the Dashboard, allows you to View Forms, Manage Transactions, and Create a New Transaction.

8. The left-side of the Dashboard contains buttons that allow you review specific details regarding the status of your transactions.

Signature packets must be in the “In Progress” status to be reflected here.

Listing must have a listing rental expiration date as well as an “Active/Pending” status.

Transactions must have a closing date to be reflected here.

Retention Dates are based on pre-determined state retention policies.
9. In the middle of Dashboard is the Recent Activity feed. This information tracks detailed activities for each of your transactions.

*Note: Clicking the “See More” button displays 90 days of event activities.

10. The right-side of the Dashboard you have access to three graphs, Potential Sales Volume, Active Property Types, and Active Transaction Types, which represent additional transaction analytics.

*Note: Potential Sales Volume is being pulled from the listing price and/or purchase price within your Transactions.
11. Below Potential Sales Volume is the Tasks area. You will see Tasks not started, Tasks in progress, and Overdue tasks. By clicking any one of these you will be launched to the Tasks Tabs on the Navigation Bar.

*Note: If you see “Tasks need approval” and “Docs need approval”, you are part of a brokerage account. Single users will not see the option regarding document approval.

12. At the bottom of the Dashboard is the Property Map. The Property Map provides a visual display of your transaction’s location. For your transaction location to appear on the Property map you need to enter the requested criteria of your property into the Transaction Summary. Smarty Streets will then verify the address.
12. At any time, you can have an interactive, virtual tour of the Agent Dashboard by clicking on the Guided Help button in the bottom right-hand corner of the screen. Once opened, click on “Widgets in the Dashboard”, and the Tour begins!

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