Creating a New Transaction 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. From inside of zipForm® Plus, click on "New" to begin the process of creating a new transaction.
3. The New Transaction Launch Pad will now open. From here, please select the transaction type, whether it is a New Listing, New Purchase or Offer, New Lease, or New Lease-Listing.

4. Enter the name of the transaction.

   Once completed making your entries and selections, click on the green “Save” button at the bottom of the Transaction Information window.
5. The Transaction Summary Page displays information like Property Summary, Purchase Summary, and Listing Summary.

On the left side of the page, you will find Transaction Information such as the Transaction identification number (TID). Below that, is the capability to add transaction parties. There is also access to the “Launch Pad” on the right side of the page.

Click on the “Documents” tab at the top of the transaction page.
6. Click on the blue “All Forms” button on the right side of the screen, to add forms to your transaction.

7. The “Form Libraries” window will open, and the choice of library and forms will be available for selection.
8. For every form or document that is added, a notification, in yellow, will appear telling you that it was successfully added.

9. To Add a transaction party, click on the “Parties” tab.
10. Select the transaction party role, on the left side of the screen. The role selection will open the Transaction Party window. Here, enter the information for the party, to create the party record. After those entries are made, click on the green “Save” button.

11. You have now successfully created your first transaction! As time goes on, a robust transaction collection will be built. (See below)

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