

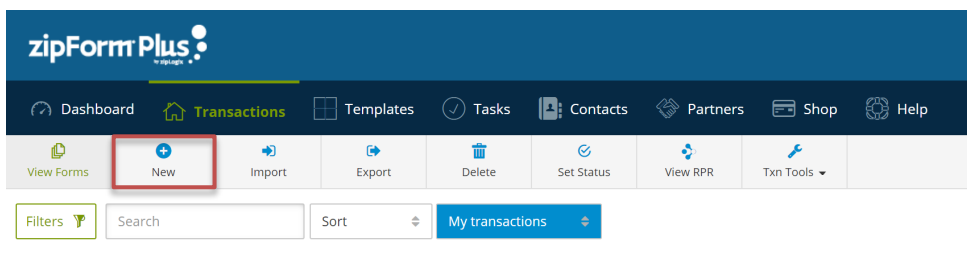


Creating a New Transaction inside zipForm® Plus!

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.

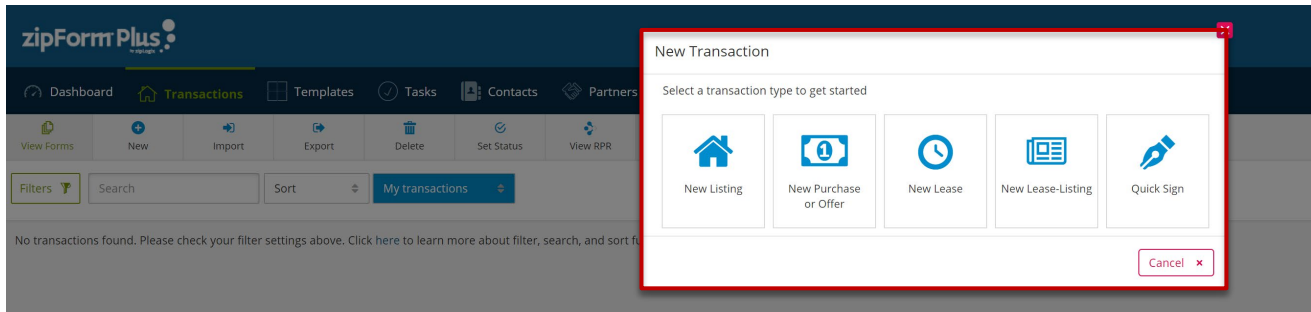
The image shows the login interface for zipForm Plus. At the top is the logo "zipForm® Plus by zipLogix™". Below it, a prompt says "Enter your username and password to continue". There are two input fields: "Username" and "Password". A green "Sign In" button is positioned below the password field. Underneath the button are links for "Forgot username | Forgot password" and "No account? Create one!". At the bottom, separated by an "or" line, is a blue button that says "Sign in with your NAR.realtor/Username and Password".

2. From inside of zipForm® Plus, click on "New" to begin the process of creating a new transaction.



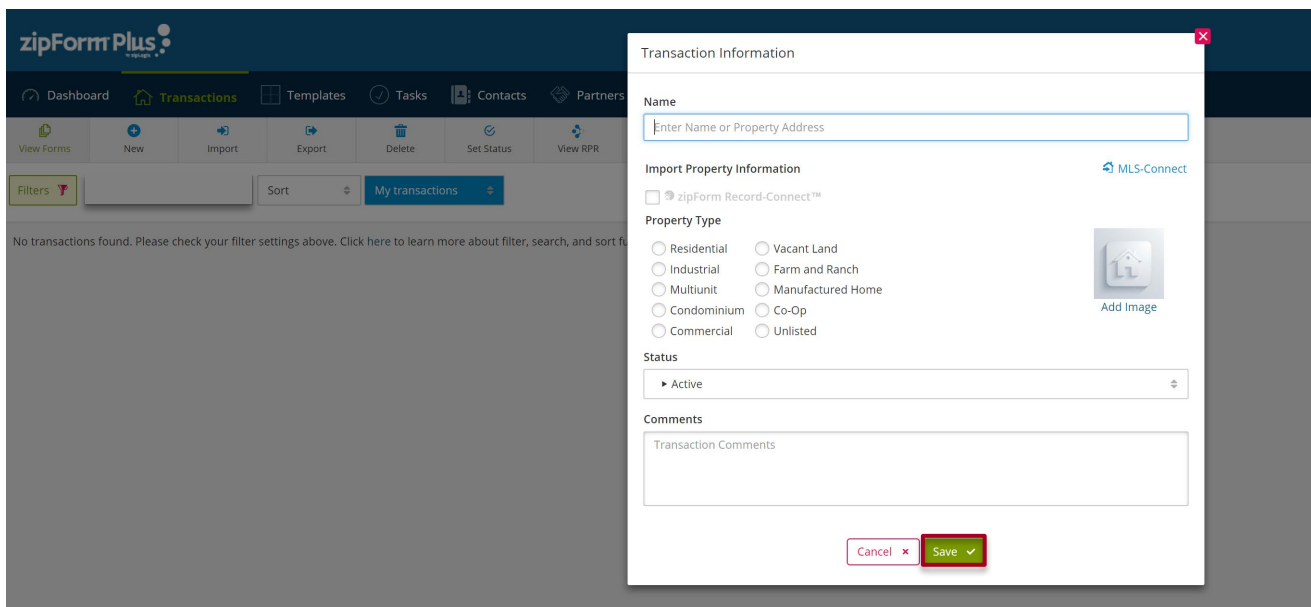


3. The New Transaction Launch Pad will now open. From here, please select the transaction type, whether it is a New Listing, New Purchase or Offer, New Lease, or New Lease-Listing.



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.

Transaction Information:

- Chris Lolli (clolli@ziplogix.com)
- Purchase Residential
- TID: 48869544
- Modified: 22 hours ago

Property Summary:

MLS Number	Municipality Type
Street Address	Zoning
Unit Number	Lot Number
City	Block Number
County	Plat Book Number
State	Page Number
Zip	Assessors Parcel #
Subdivision	Parcel/Sidwell #
Year Built	Legal Description
School District	

Purchase Summary:

Offer Date	Initial Deposit
Offer Expiry Date	Deposit Increase 1

Launch Pad:

- Add Document
- Sign
- Apply Template
- Share Docs
- Email Docs to Txn
- Fax Docs to Txn

Click on the “Documents” tab at the top of the transaction page.

Transaction Information:

- Chris Lolli (clolli@ziplogix.com)
- Purchase Residential
- TID: 45955638
- Modified: 5 days ago

Property Summary:

MLS Number	Municipality Type
Street Address: 11098 Bleeker St	Zoning
Unit Number	Lot Number
City: Rochester Hills	Block Number
County: Oakland	Plat Book Number
State: MI	Page Number
Zip: 48026	Assessors Parcel #
Subdivision	Parcel/Sidwell #
Year Built	Legal Description
School District	

Purchase Summary:

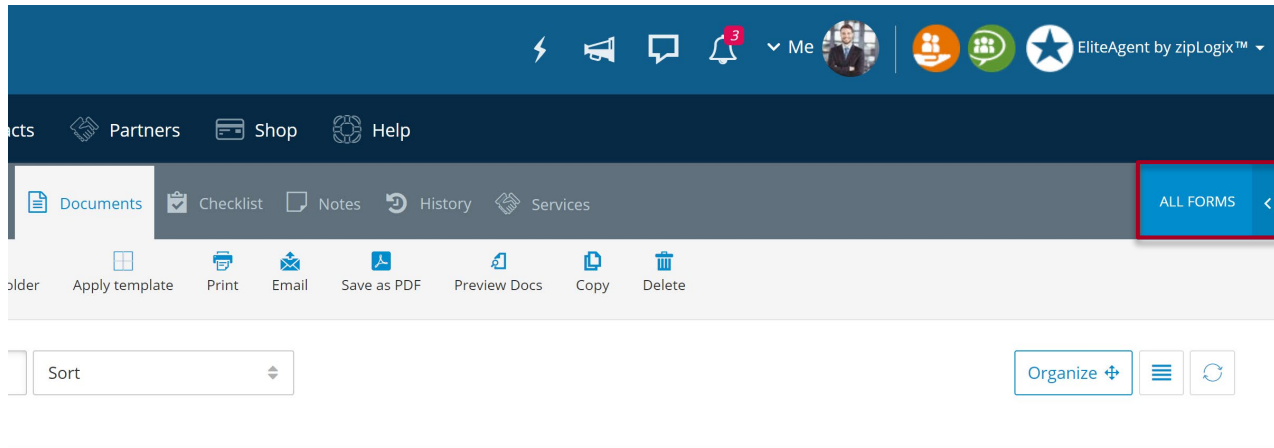
Offer Date	Initial Deposit
Offer Expiry Date	Deposit Increase 1

Launch Pad:

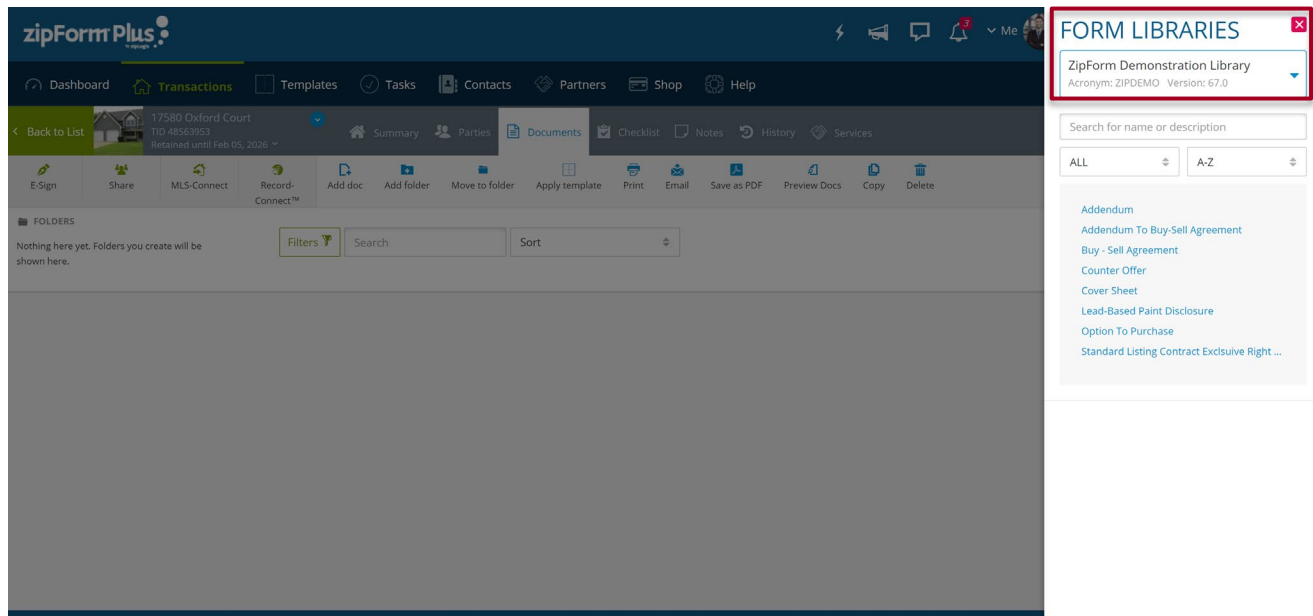
- Add Document
- Sign
- Apply Template
- Share Docs
- Email Docs to Txn
- Fax Docs to Txn



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.

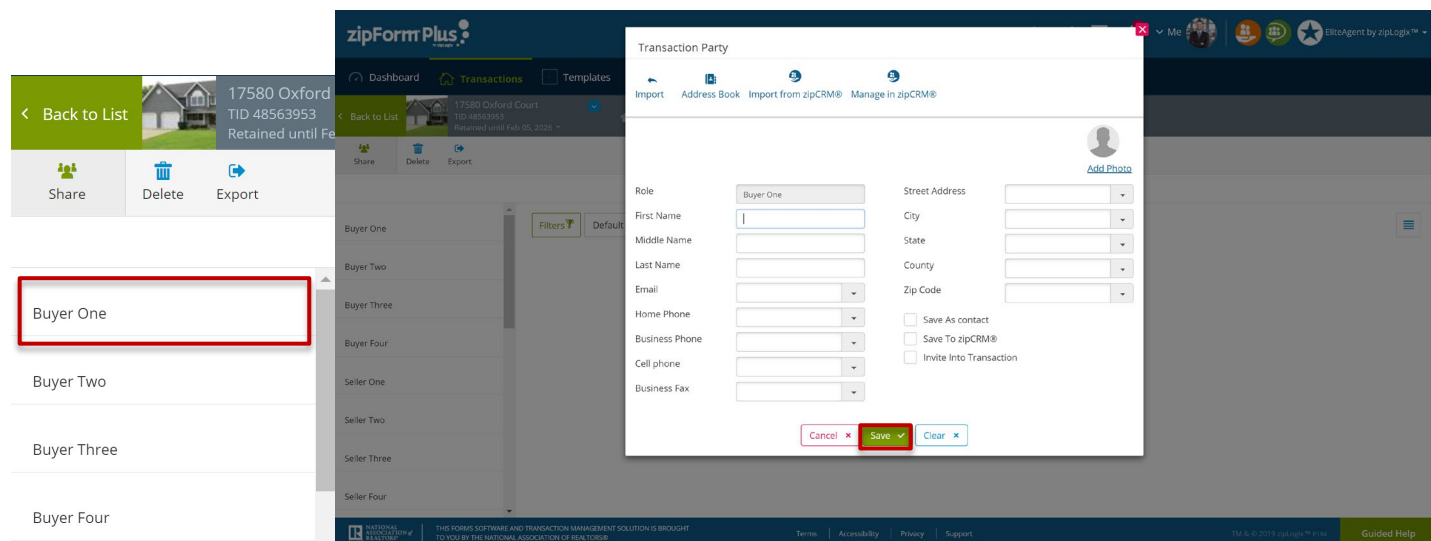
The screenshot shows the zipForm Plus interface. A yellow notification banner at the top right states: "Form - Addendum To Buy-Sell Agreement was successfully added." The main navigation bar includes Dashboard, Transactions, Templates, Tasks, Contacts, Partners, Shop, and Help. The Transactions tab is active, showing a transaction for "17580 Oxford Court" with ID 48563953. The Documents sub-tab is selected, displaying a list of documents: Cover Sheet - [COVER_A], Buy - Sell Agreement - [BUYSELL], Lead-Based Paint Disclosure - [LBPD], and Addendum To Buy-Sell Agreement - [A49]. A right-hand sidebar titled "FORM LIBRARIES" shows a search bar and a list of document types: Addendum, Addendum To Buy-Sell Agreement, Buy - Sell Agreement, Counter Offer, Cover Sheet, Lead-Based Paint Disclosure, Option To Purchase, and Standard Listing Contract Exclusive Right ...

9. To Add a transaction party, click on the “Parties” tab.

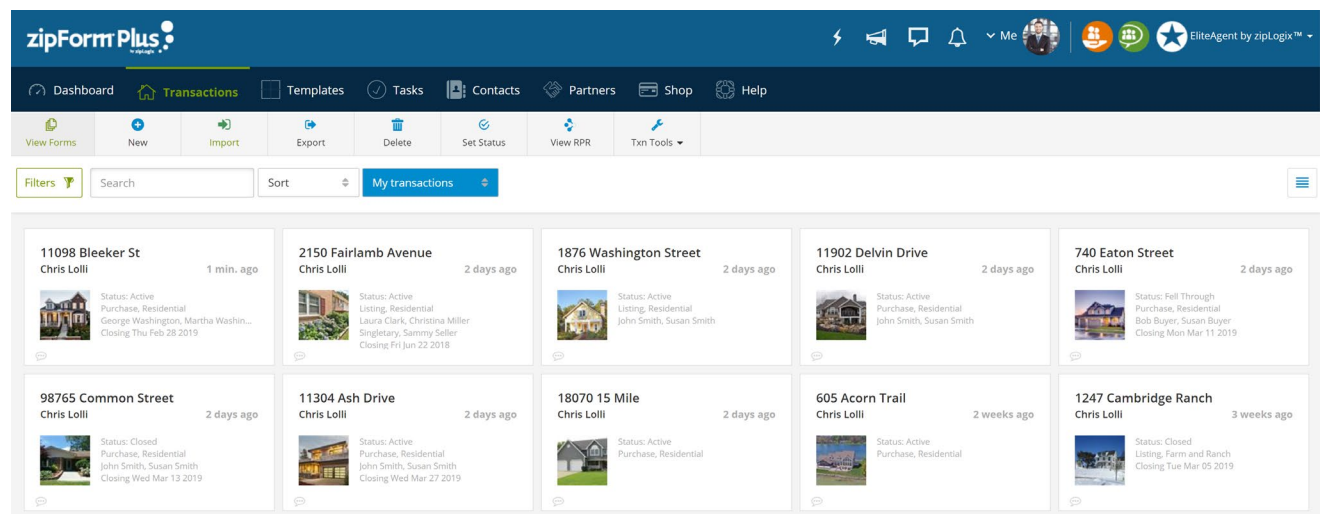
The screenshot shows the zipForm Plus interface with the "Parties" tab selected. The main navigation bar is the same as in the previous screenshot. The Transactions tab is active, showing the same transaction. The Parties sub-tab is selected, displaying a list of parties: Buyer One, Buyer Two, Buyer Three, Buyer Four, Seller One, Seller Two, Seller Three, and Seller Four. A right-hand sidebar titled "FORM LIBRARIES" is also visible, showing the same search bar and list of document types as in the previous screenshot.



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)



Visit www.ziplogix.com for more helpful tools like this guide!