

# Lone Wolf Link for zipTMS®

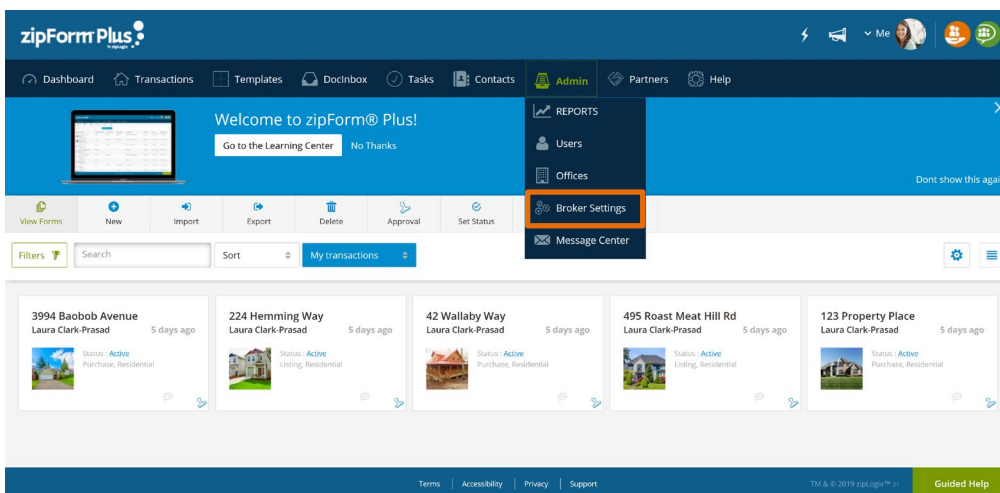
How to integrate your zipForm® Plus account with Lone Wolf Link

## Summary

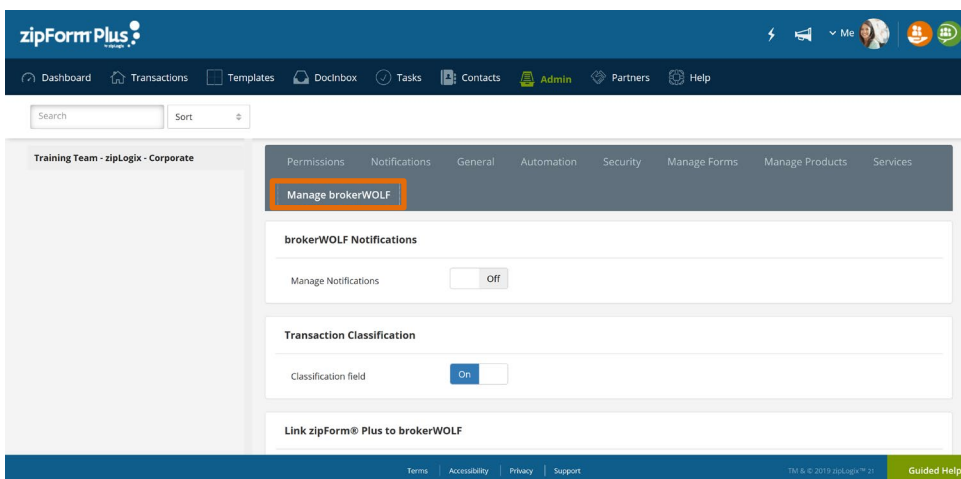
Describes how to link your zipForm® Plus account to Lone Wolf Link.

## Steps

1. Sign into zipForm® Plus and click on the “Admin” tab. From the drop-down, select “Broker Settings.”



2. Select the tab which reads “Manage brokerWOLF.” Here, you will be able to set your preferences associated with your brokerWOLF account.



- If desired, set “Manage Notifications” to “On” to enable brokers to change their notification settings.

Permissions Notifications General Automation Security Manage Forms Manage Products Services

Manage brokerWOLF

**brokerWOLF Notifications**

Manage Notifications  Off

- Set “Classification field” to “On” if you wish to enable the agent’s ability to generate Transactions that would reflect in brokerWOLF. Turning the “Classification field” off will disable agents’ ability to generate transactions that would reflect in brokerWOLF,

Permissions Notifications General Automation Security Manage Forms Manage Products Services

Manage brokerWOLF

**brokerWOLF Notifications**

Manage Notifications  Off

**Transaction Classification**

Classification field  On

- “Link zipForm® Plus to brokerWOLF” to link other zipForm® Plus users to brokerWOLF.

Permissions Notifications General Automation Security Manage Forms Manage Products Services

Manage brokerWOLF

**brokerWOLF Notifications**

Manage Notifications  Off

**Transaction Classification**

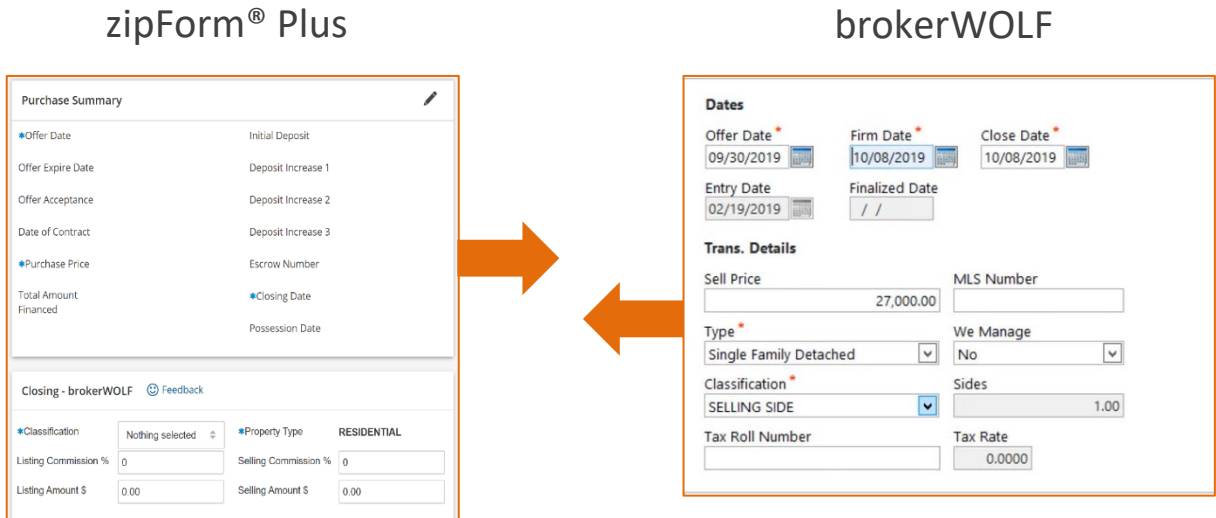
Classification field  On

**Link zipForm® Plus to brokerWOLF**

Search

Linked	Agent	Email	UserName
<input type="checkbox"/>	Tim Schmidt	tschmidt@lwolf.com	tschmidt
<input type="checkbox"/>	Allison Smith	allisonsmith@lwolf.com	asmith
<input checked="" type="checkbox"/>	John Miller	johnmiller@lwolf.com	jmllder

- After adjusting your notifications and settings, you can start entering data into your Transaction Summary Screen in zipForm®. Anything marked with an asterisk are mandatory fields for data migrating to and from brokerWOLF.



There are THREE significant financial milestones found in zipForm® Plus.

- First, is “Met Date” located under the “Contingencies” menu on the Transaction Summary screen.

The screenshot shows the 'Closing - brokerWOLF' screen. It features a 'Classification' dropdown set to 'AGENT DOUBLE ...' and a 'Property Type' dropdown set to 'RESIDENTIAL'. Below these are input fields for Listing Commission %, Selling Commission %, Listing Amount \$, and Selling Amount \$, all with values of 0 or 0.00. A warning message states: 'Agent Commission- Combined agent(s) End Count can not exceed: 2.0'. The 'Contingencies' section contains a table with columns for 'Contingency', 'Due Date', and 'Met Date'. The 'Met Date' field in the first row is highlighted with an orange box. There is a close button (X) in the top right corner of the contingencies section.

- Second, is "Received" located under the "Trust & Escrow" menu on the Transaction Summary screen.


Agent Commission - Combined agent(s) End Count can not exceed: 2.0

Contingencies


Referrals

Outside Brokers

**Trust & Escrow**



Held By  We Hold  **Received** 

Deposit Date  Amount  Check #

- Third, is accounting complete located on the Transactions list page, in list view (If you are in Grid View, select  to change to List View), and the Checklist page once you select your transaction.

Dashboard **Transactions** Templates DocInbox Tasks Contacts Admin Partners Help

View Forms OfferPlace™ ListFlash® New Import Export Delete Approval Set Status Transfer Txn Tools

Filters 1234 Sort My transactions  


TRANSACTION NAME	TRANSACTION STATUS	SELLER/LANDLORD	BUYER/TENANT	PROP ADDRESS	CREATED	RETENTION DATE	FINANCIAL MILESTONES
1234 BrokerWolf Drive Submit for review Dean Trainer Transaction ID 41312041 Closing Fri Oct 25 2019	Active			1234 BrokerWolf Drive, Pittsburgh PA	Thu May 24 2018 Modified: 6 days ago	Sat May 24 2025	Contingency Met

Dashboard **Transactions** Templates DocInbox Tasks Contacts Admin Partners Help


Back to List 123 Broker Blvd  
TID 57095277  
Retained until Oct 23, 2026

Summary Parties Documents **Checklist** Notes History Services

Calendar Checklist Board Approval Set Status Change Due Date Assign Tasks New Checklist Export Delete E-mail Urgent Tasks

Filters Search Sort Responsible Party Txn dates Due Today Overdue ORGANIZE 

**Financial Milestones**  
No Contingency

Urgent Tasks 

7. Once a deal is finalized inside brokerWOLF, those fields will no longer be editable.

Key Info | People | Outside Brokers | Trust | Commissions | Agent Info

Help | Notes | Docs...

**Sale Closing Information**

Sell Price	Closing Date	Sub-Trans.	Status	A.R.
400,000.00	10/25/2019	000001-A	Open	64,000.00

**Agent Information**

Agent	Side	#	%	Agt Base	Deducted	Gross	TAX	Net	
999 - Trainer,Dean	S	1.00	100.00	28,000.00	0.00	28,000.00	0.00	28,000.00	
				<b>Totals:</b>					
					1.00	100.00	28,000.00	0.00	28,000.00

**Selling Fees Deducted for 999 - Trainer,Dean 000001-A**

Deduction	Pct	Amount	Taxed

**Commission Taxes**

**Agt Base:** 28,000.00 0.00

**Less Deductions:** 0.00 0.00

**Gross:** 28,000.00 0.00

**Net:** 28,000.00

Amounts in blue indicate fee calculation has been overridden

Store **Finalize**  Ask about overrides

Print

Cancel Exit