

zipForm[®] Plus

Quick Tips

2018



zipLogix Academy[™]



We are excited to announce the release of our new Platform Design! With these new enhancements in full swing, we wanted to take you inside zipForm® Plus and share some quick tips that may be useful. Please take a moment and familiarize yourself with these new features, updated tools, and the exceptional overall layout of this new user-friendly platform.

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A New Look

Once you access your account, you will instantly notice the fresh appearance of zipForm® Plus. With many features now at your fingertips, navigation has never been easier.

The screenshot displays the zipForm Plus dashboard interface. At the top, there's a navigation bar with links to Dashboard, Transactions, Templates, Tasks, Contacts, Partners, and Help. Below this, a summary section shows key metrics: Quarterly Sales (\$359,000, +25.8%), Commission (\$17,950/mo), Closed Term 1 (\$359,000/mo), and Fall Through 1 (\$300,000/mo). The main area is divided into several sections: Recent Activity (a list of transactions), Potential Sales Volume (a bar chart showing \$3,991,900 for Active Listings and \$2,879,000 for Pending Transactions), Active Property Types (a donut chart), and Active Transaction Types (a pie chart). Below these are task counts: 25 tasks not started, 2 tasks in progress, 27 transaction tasks, 2 tasks need approval, and 3 tasks need approval. A map of the United States is also visible. The bottom section shows a list of transactions with details like address, agent, and status.

Address	Agent	Status	Time
7052 Crego Rd.	Jane Smith	Purchase, Residential	2 weeks ago
10664 HEWITT	Jane Smith	Purchase, Residential	2 weeks ago
5643 Brook Ave.	Jane Smith	Purchase, Residential	3 weeks ago
6256 April Brooke Circle	Jane Smith	Purchase, Residential	3 weeks ago
3214 Train River Road	Jane Smith	Listing, Residential	3 weeks ago
43108 Forest Edge SQ.	Jane Smith	Purchase, Residential	3 weeks ago
52 Beachstone Drive	Jane Smith	Purchase, Residential	4 weeks ago
117 Clover Lane	Jane Smith	Purchase, Residential	4 weeks ago
63 Oakhill Drive	Jane Smith	Listing, Residential	4 weeks ago
10 Aspenhill Court	Jane Smith	Purchase, Residential	4 weeks ago
3729 Ashley Way	Jane Smith	Purchase, Residential	4 weeks ago
8769 Tracey Park Drive	Jane Smith	Listing, Residential	4 weeks ago
1894 Frasers Mountain Road	Jane Smith	Purchase, Residential	4 weeks ago
2663 Old Sambre Road	Jane Smith	Purchase, Residential	4 weeks ago
75A Central Avenue	Jane Smith	Purchase, Residential	4 weeks ago
46576 West Haven	Jane Smith	Purchase, Residential	4 weeks ago
3647 Main Drive	Jane Smith	Purchase, Residential	Mon Jan 29 2018
2723 Deer Ridge Dr	Jane Smith	Purchase, Residential	Mon Jan 22 2018
65 King Street	Jane Smith	Purchase, Residential	Wed Dec 06 2017
4756 Hallena	Jane Smith	Listing, Residential	Tue Dec 05 2017



Navigation Bar

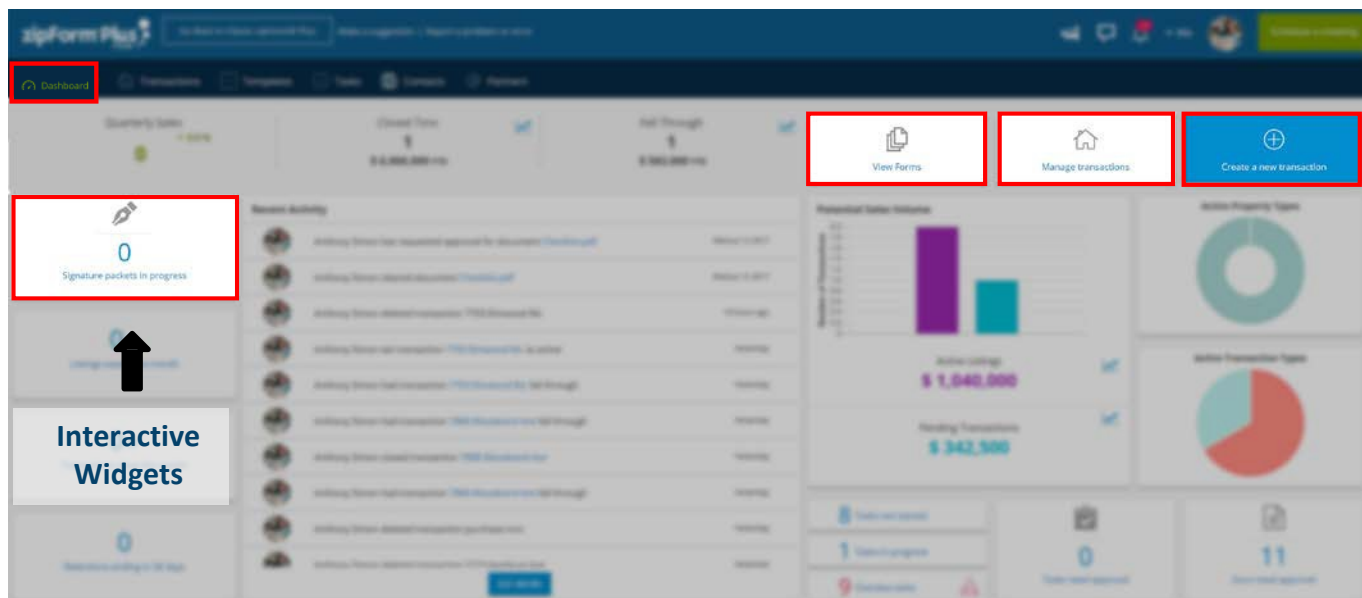
The zipForm® Plus Navigation Bar is where you can navigate to different areas of the application.



Dashboard	Review transaction details in your dashboard along with many other useful options such as create a new transaction, manage transactions and view forms.
Transactions	Review all transactions, edit, delete, import/export, and create new transactions using various property types.
Templates	Review all templates, edit, delete, import/export, and create new templates using various property types.
Tasks	Review urgent tasks and statuses for all your transactions, edit, delete, and display these tasks in a calendar view. You may also view any cloud-based calendars you currently access such as Google, MS Live and Office 365.
Contacts	Review parties involved for all your transactions, edit, delete, create new and import/export. You also have the ability to import cloud-based calendars you currently access such as Google, MS Live, Office 365, Top Producer and Yahoo.
Partners	Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money.

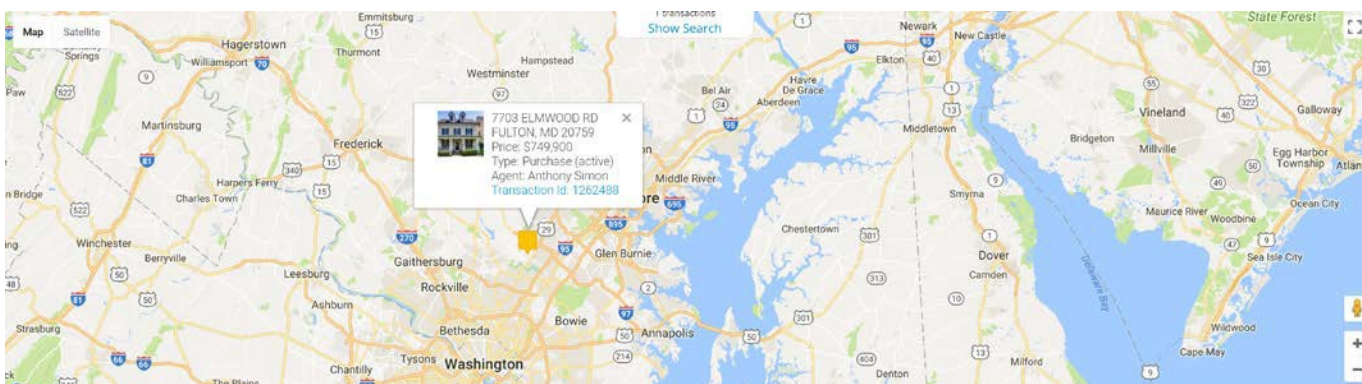
Dashboard

Welcome to the Dashboard! At a glance, along with interactive widgets, agents can review their entire progress for all of their transactions as well as viewing forms, manage transactions, and create a new transaction all from one central location.



Map Display

Details pertaining to property information are also displayed on the map within the Dashboard.

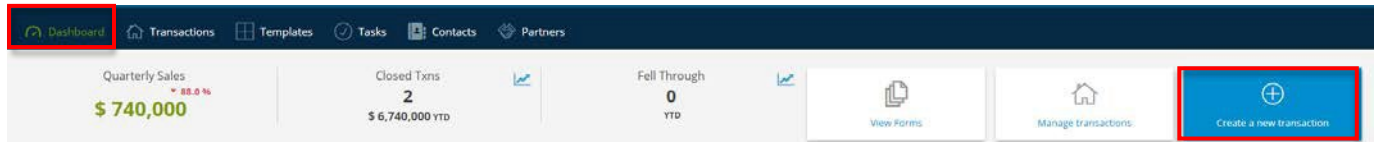




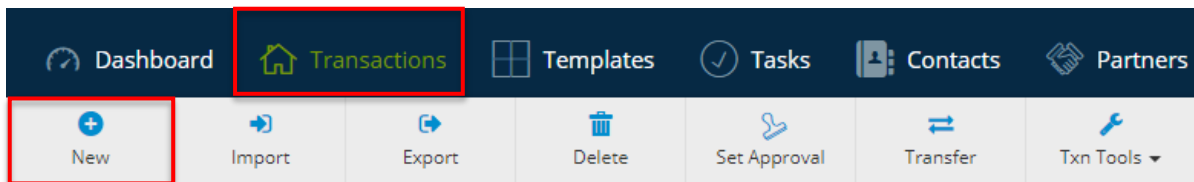
Creating Transactions

New transactions can be created in various places. Create your transactions directly from your “Dashboard” (A:) or by clicking “Transactions” (B:)

A:

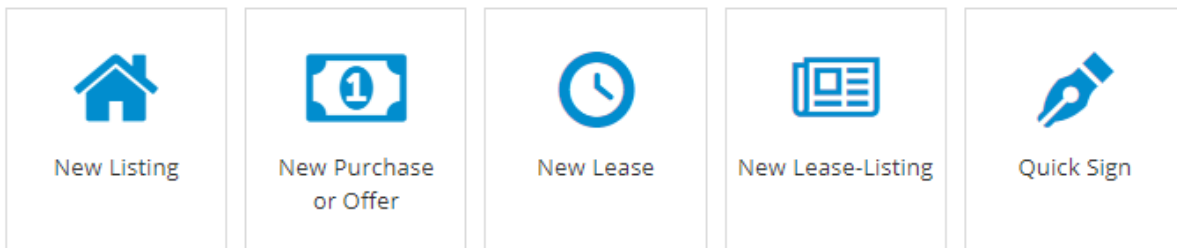


B:



Select Your Transaction Type

Once you start creating your transaction, you will be asked to select one of the transaction types below:





Transaction Information

After selecting the transaction type, you will be able to add the necessary transaction information, including importing from your MLS. Please understand that not all MLS's participate in the utilization of zipFormMLS-Connect®. Please contact your MLS for further details.

Transaction Information

Name

MLS Property Address

 MLS Connect

Property Type

- | | |
|-----------------------------------|-----------------------------------------|
| <input type="radio"/> Residential | <input type="radio"/> Commercial |
| <input type="radio"/> Industrial | <input type="radio"/> Vacant Land |
| <input type="radio"/> Multiunit | <input type="radio"/> Farm and Ranch |
| <input type="radio"/> Condominium | <input type="radio"/> Manufactured Home |



Add Image

Comment

Select Template






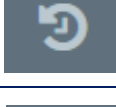
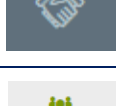

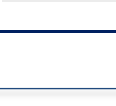
Cancel ×

Save ✓




Getting Around zipForm® Plus: Icon Assistance

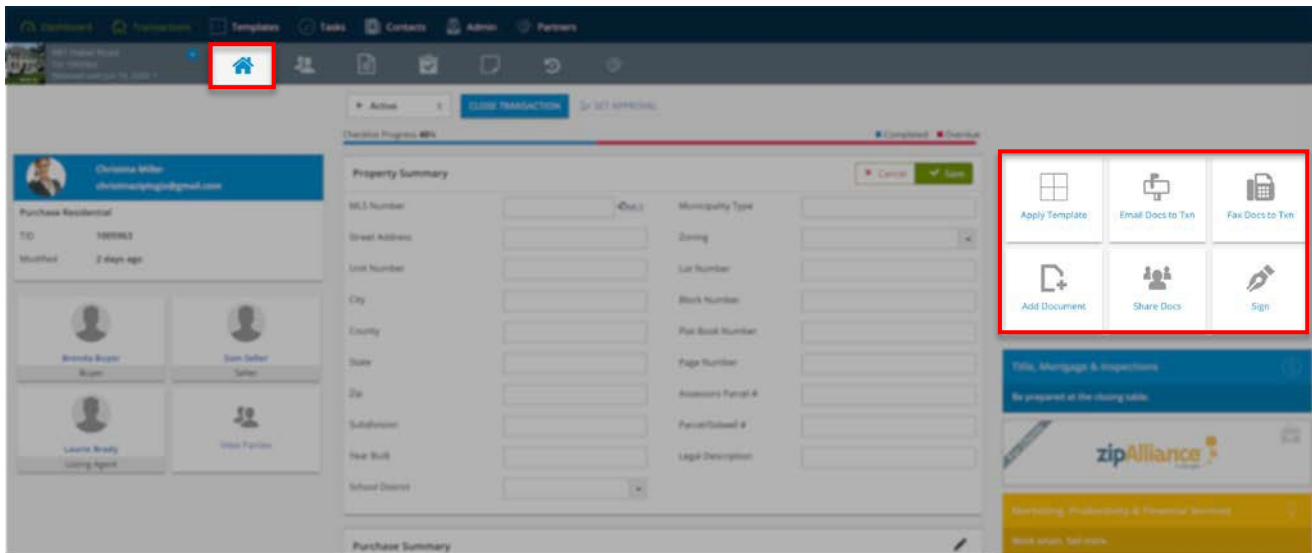
Once you are in your transaction, you may notice some new icons and menu options. Please take a moment, familiarize yourself, and see what's new.

	Transaction Summary: Enter Property Information, Listing Information, and Purchase Information.
	Transaction Parties: Create new parties involved with the transaction. Edit existing parties and collaborate with parties using Private Share.
	Form/Document Access within Transaction: Access form libraries, add documents, add folders, apply templates and send documents for approval.
	Checklists and Tasks: Create new checklists, view/edit existing checklists and urgent tasks, delete checklists and view Calendar.
	Notes: Create reminders that pertain to the transaction. You can choose to e-mail, save as PDF and/or print notes.
	History: Track progress of transactions, review comments, and document approvals.
	Partners: Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money.
	Private Share: Collaborate with parties by sharing documents. Import parties using your zipLogix™ contacts or pull contacts in from one of your cloud base accounts.
	Public Share: Collaborate with parties by creating a public link for parties to access your documents.




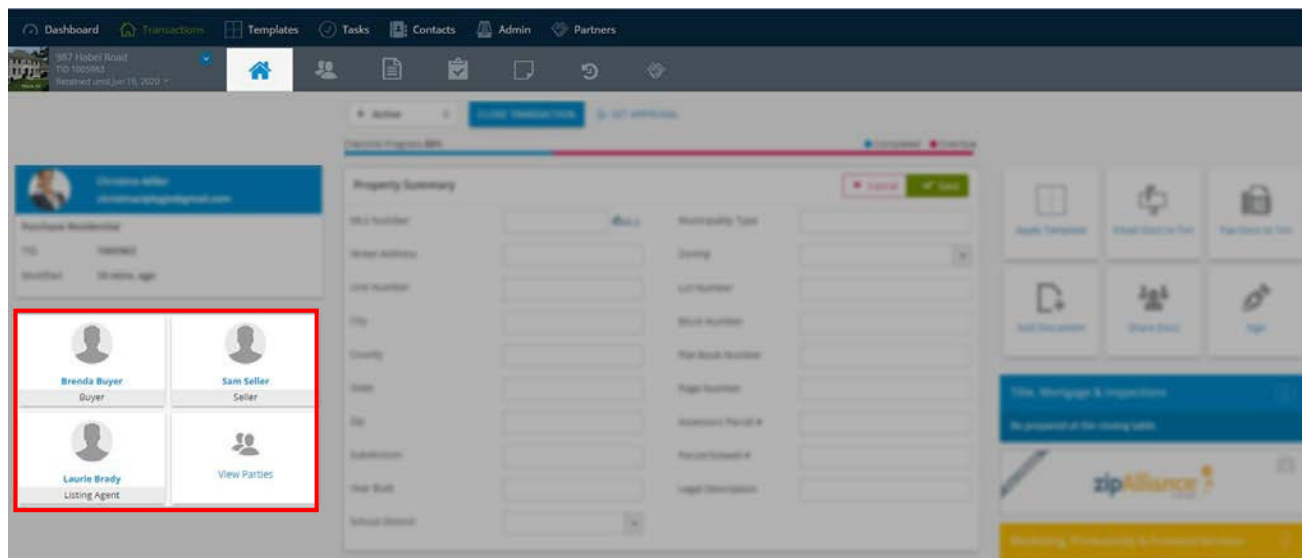
Transaction Summary

While in the Transaction Summary  you can perform a number of actions by quickly accessing the menu you see below:



Transaction Parties

Within the Transaction Summary, you can also access your transaction parties. 

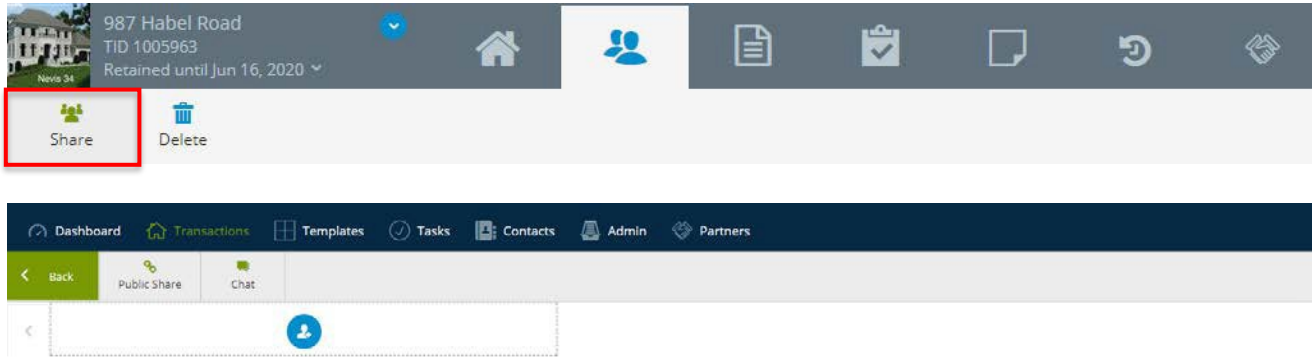




Private and Public Share



Within the transaction parties tab, you have the ability to create new parties involved with the transaction, edit existing parties, and collaborate with parties using Private Share.



Private Share

Create a private Share, documents and permissions will be granted only to specified user.



Click to start sharing

Public Sharing

Turn Public Transaction sharing "On". Set an expiration date for the public links to expire. Then select the type of public link to create. Preview the link then copy to your clip-board.

Public Sharing

On

Stop Sharing Date 08/09/2017

Copy Link

Preview

<https://r.zipformplus.com/?par=eyJwdWJsaWNTaGFyZSI6IlpaMTgtTUJUM3w>

Public Share Link:

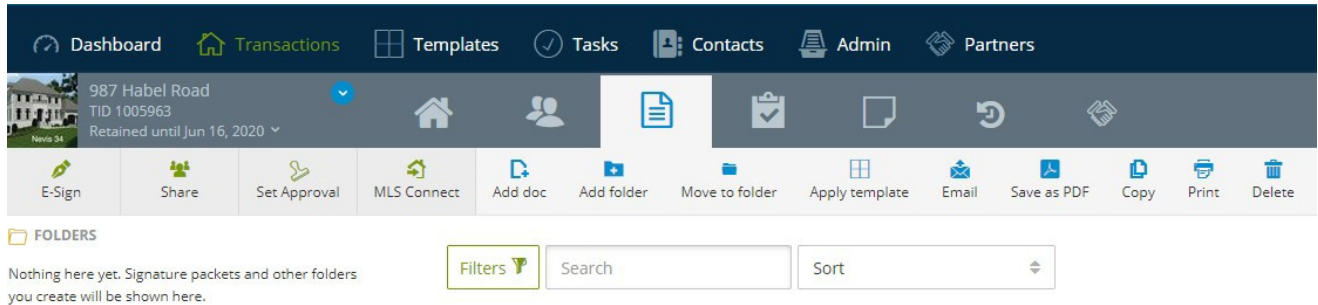
Select forms and/or documents from below. Click "Preview" to view the link. Click "Copy Link" to copy to your clip board.

📁 - 987 Habel Road



Form/Document Access

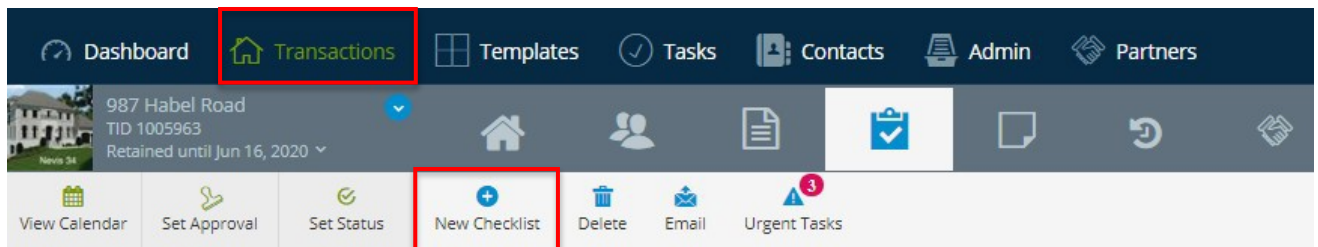
Access form libraries, add documents, add folders, apply templates, and send documents for approval.



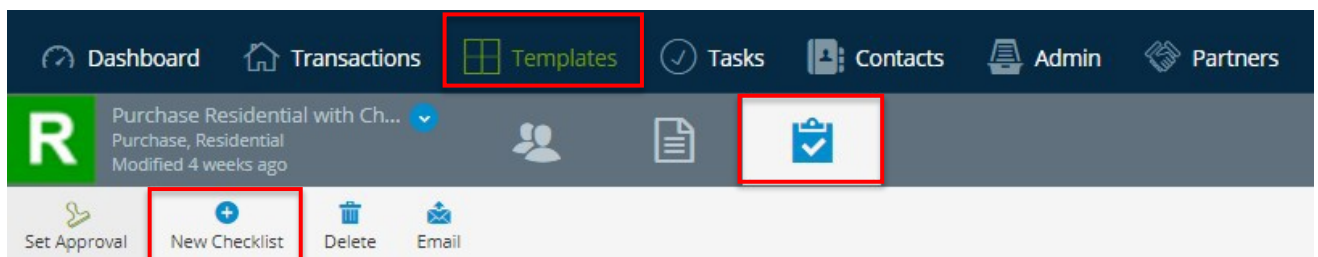
Checklists and Tasks

Within “Transactions,” create new checklists, view/edit existing checklists and urgent tasks, delete checklists and view Calendar (A:). A checklist can also be created in “Templates”. Once created, these templates, along with the checklists, can automatically be added to your transaction (B:).

A:



B:





Notes

Notes containing supplemental information can be added to any transaction.

Dashboard Transactions Templates Tasks Contacts Admin Partners

987 Habel Road
TID 1005963
Retained until Jun 16, 2020

New Email Save as PDF Print Notes

Christina Miller Jul 10, 2017 10:40AM
Talk to seller about items that are staying with the property

Christina Miller Jul 10, 2017 10:38AM
Please obtain additional additional photos of property and photos of water damage on barn floor

History

Track progress of all transactions, review comments, and check on the status of a digital signature packet.

Dashboard Transactions Templates Tasks Contacts Admin Partners

125 Harrington Blvd.
TID 1037045
Retained until Mar 03, 2020

History

March 3, 2015 2:21 PM [Eastern Standard Time]
Documents signed via zipLogix Digital Ink® have been completed and stored in this transaction.
Addendum to Sale Agreement #1 - 01/2015 [View](#)

Christina Miller March 3, 2015 1:20 PM [Eastern Standard Time]
has sent **Addendum to Sale Agreement #1 - 01/2015** for e-signatures using zipLogix Digital Ink®. [Check Status](#)

Christina Miller March 3, 2015 11:23 AM [Eastern Standard Time]
Sent invitation to collaborate to Brenda Buyer (christinaziplogix@gmail.com)

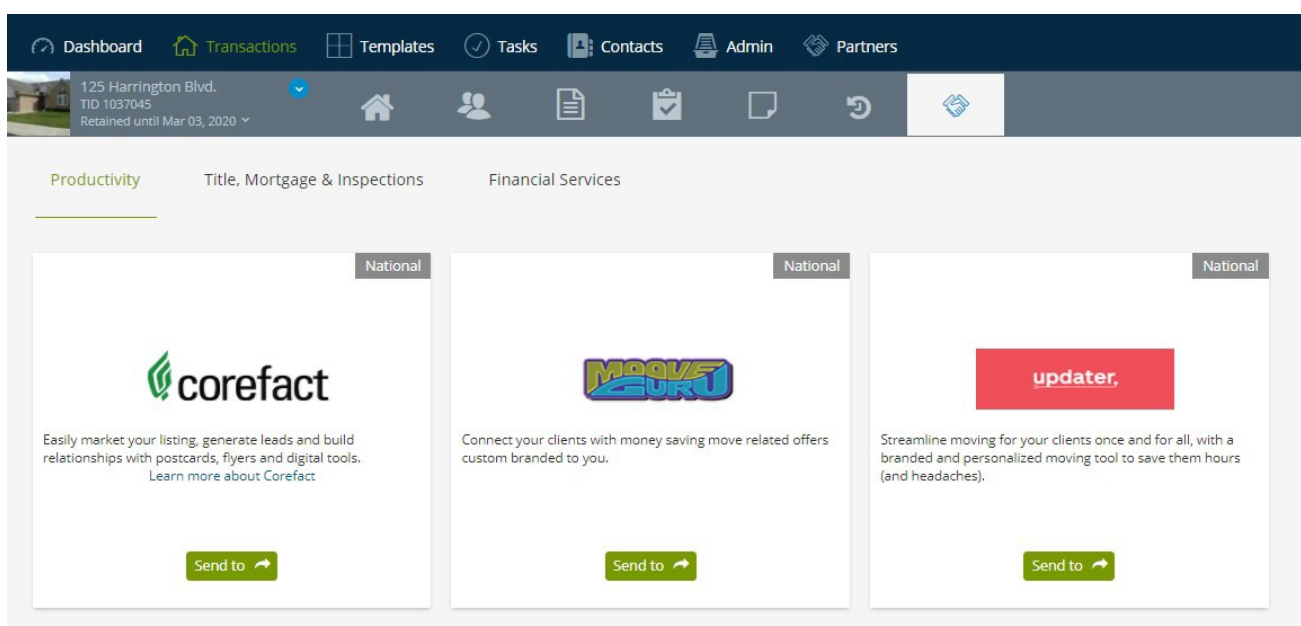
Christina Miller March 3, 2015 11:23 AM [Eastern Standard Time]
Shared (0) (1) with (2) (3)

Christina Miller March 3, 2015 11:17 AM [Eastern Standard Time]
has sent **Purchase Agreement** for e-signatures using zipLogix Digital Ink®. [Check Status](#)



zipAlliance™ Partnership Program

Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money. Sort through categories and learn about the best solution for you.

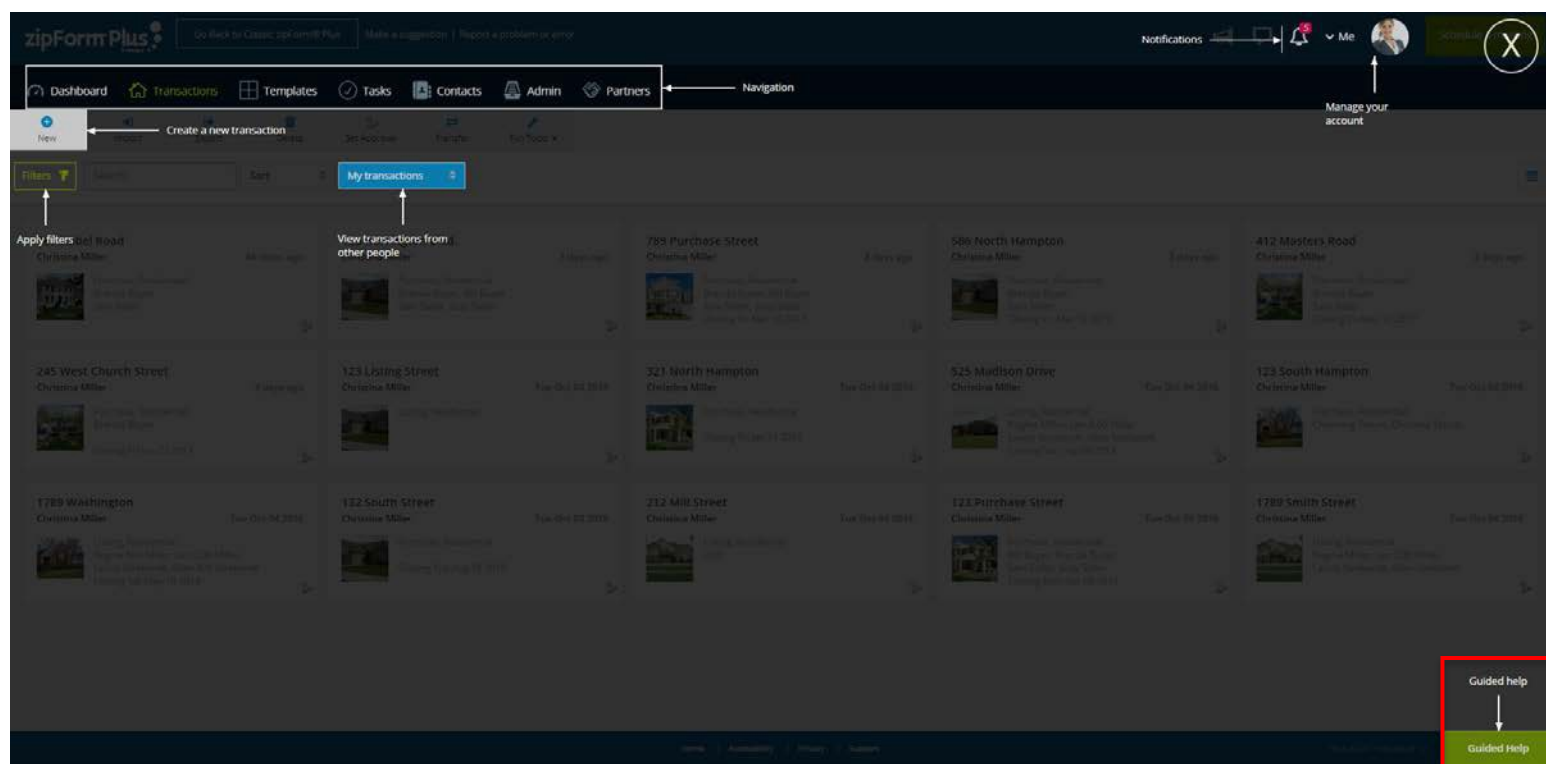


The screenshot displays the zipAlliance™ Partnership Program interface within the zipForm Plus application. The top navigation bar includes links for Dashboard, Transactions, Templates, Tasks, Contacts, Admin, and Partners. Below this, a sidebar shows a property listing for 125 Harrington Blvd. with TID 1037045, retained until Mar 03, 2020. The main content area is titled "Productivity" and features three partner cards, each labeled "National" in the top right corner. The first card is for Corefact, described as a tool to easily market listings, generate leads, and build relationships with postcards, flyers, and digital tools. The second card is for Move Euro, which connects clients with money-saving move-related offers custom-branded to the user. The third card is for Updater, which streamlines moving for clients once and for all with a branded and personalized moving tool. Each card includes a "Send to" button with a right-pointing arrow.



Guided Help

We understand changes take some time to get used to. We have taken extra steps to make sure we are always there for you when you need assistance. Explore the enhanced Guided Help feature and get step-by-step instructions during your entire transaction creation process.





System Requirements

Please review our most recent system requirements.

Minimum System Requirements:

- Windows 7 and above with 2GB of RAM
- Mac OSX 10.9 and above with 8GB of RAM
- Internet Explorer 11
- Mozilla Firefox 27 and above
- Safari version 8 and above
- Google Chrome version 35 and above
- Microsoft Edge Browser 13 and above
- Minimum Screen Resolution: 1024 x 768
- PDF viewer that meets current Adobe PDF standards
- Internet Connection
- Desktop or laptop computer

Recommended Requirements:

- Windows 10 and above with 8GB of RAM
- Mac OSX 10.9 and above with 8GB of RAM
- Internet Explorer 11
- Mozilla Firefox version 30 and above
- Safari version 8 and above
- Google Chrome version 35 and above
- Microsoft Edge Browser 13 and above
- Recommended Screen Resolution: 1920 x 1280 and above
- PDF viewer that meets current Adobe PDF standards
- Internet Connection
- Desktop or laptop computer



Support Information

Please feel free to contact our team should you need any further assistance!

Help Desk:

586-840-0140

Monday-Friday: 24 Hours

Weekends and Holidays: 10am-10pm ET

<http://support.zipLogix.com>

Sales:

Email: sales@zipLogix.com

General Line: 1-866-279-9653

Training:

Email: training@zipLogix.com

Website:

www.zipLogix.com

Office Location:

18070 15 Mile Road

Fraser, MI 48026