zipForm® Plus Broker Edition

Thank you for using zipForm® Plus Broker Edition!

You have joined the hundreds of thousands of zipForm® Plus users who are currently enjoying the latest technology with a modern user interface that is consistently being updated with new features and functionality.

To access your zipForm® Plus account visit: www.zipformplus.com

Please enter your zipForm® Plus Broker Edition username.

Click - "Forgot Password" upon signing in. An email will be sent to you automatically providing you the steps to establish a password for your new zipForm® Plus Broker account.

zipForm® Plus Broker Edition

zipForm® Plus Broker Edition allows real estate professionals to work efficiently, accurately, and professionally throughout the real estate transaction process in a collaborative manner.

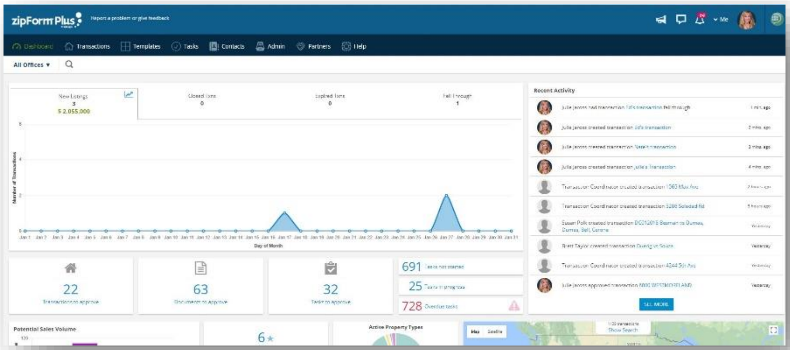
Administration Tab

Welcome to your zipForm® Plus Administrator account. zipForm® Plus offers many powerful tools to allow administrators to manage their accounts. Administrative features may be accessed at any time by hovering over the ***Administration Tab*** at the top of zipForm® Plus. The Administration tab allows you to access the office Dashboard and Reports, open the agent and office roster, establish teams, and send Broadcast messages to all or specified account users.

This guide will identify the tools needed to set up your brokerage account, manage users, toggle inside & out of transaction files all while staying organized.

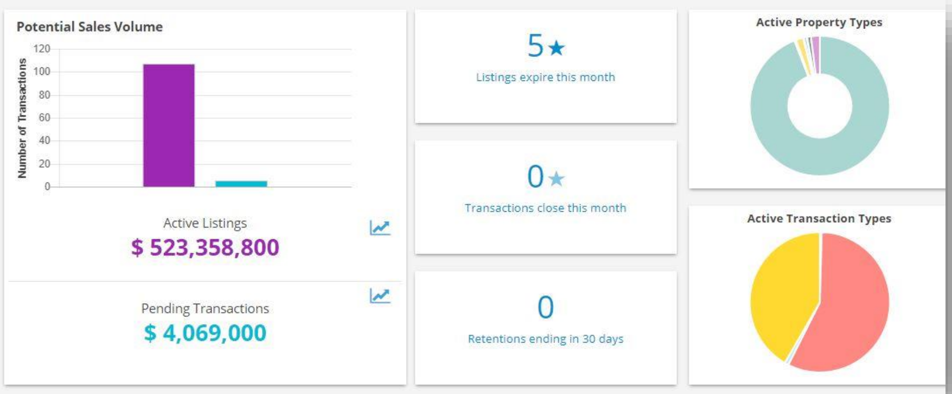
Dashboard

The ***DASHBOARD*** gives users an enhanced snapshot of their business to help easily manage transactions with confidence. With this suite of tools and widgets, offices can transform their business activities into useful, comprehensive data.



The Dashboard is made up of different widgets that helps the office better manage transactions in the following areas:

- ✓ Monthly Transaction Charts
- ✓ Recent Transaction Status and Approvals
- ✓ Current Transaction Activity
- ✓ zipTMS™ Weekly Tasks
- ✓ Quarterly Performance Snapshot
- ✓ Account Information
- ✓ Property Type
- ✓ Listing Map
- ✓ Transaction Values



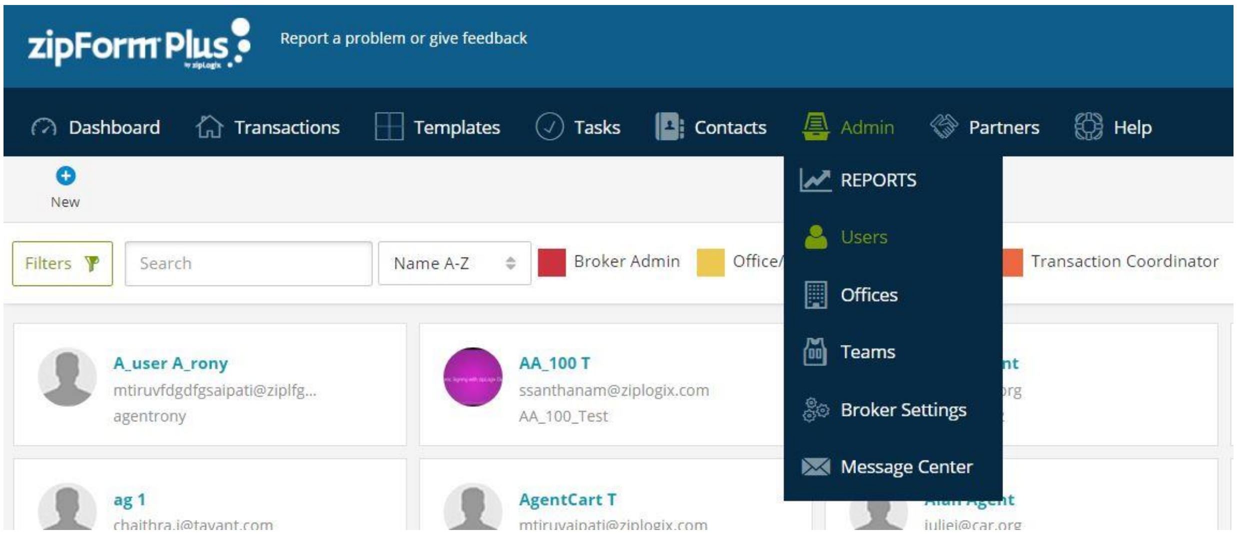
Dashboard data will display according to how agents input information in their Transaction files.

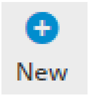
Question mark icons on the left side of each section provide Help information on the criteria needed to populate each widget on the Dashboard.

User List

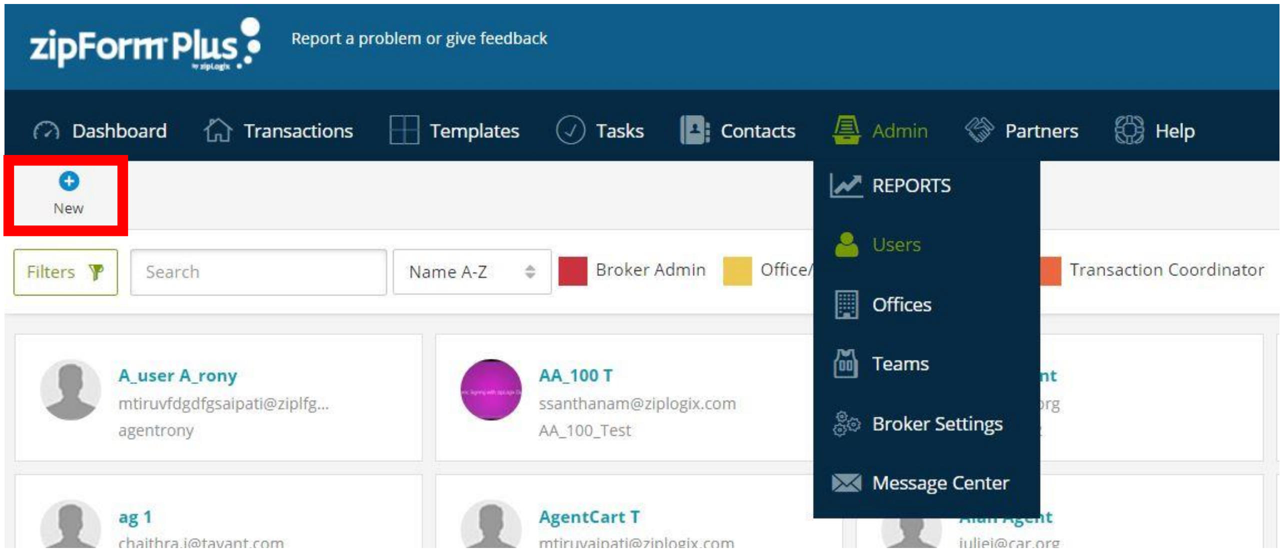
The ***USER LIST*** is comprised of zipForm® Plus users who have been assigned various roles within your Brokerage account. There are multiple Administrator profiles and agent preferences available within the platform:

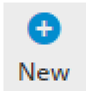
To add agents to your new account, click on "Admin" and click on "Users" from the drop down.



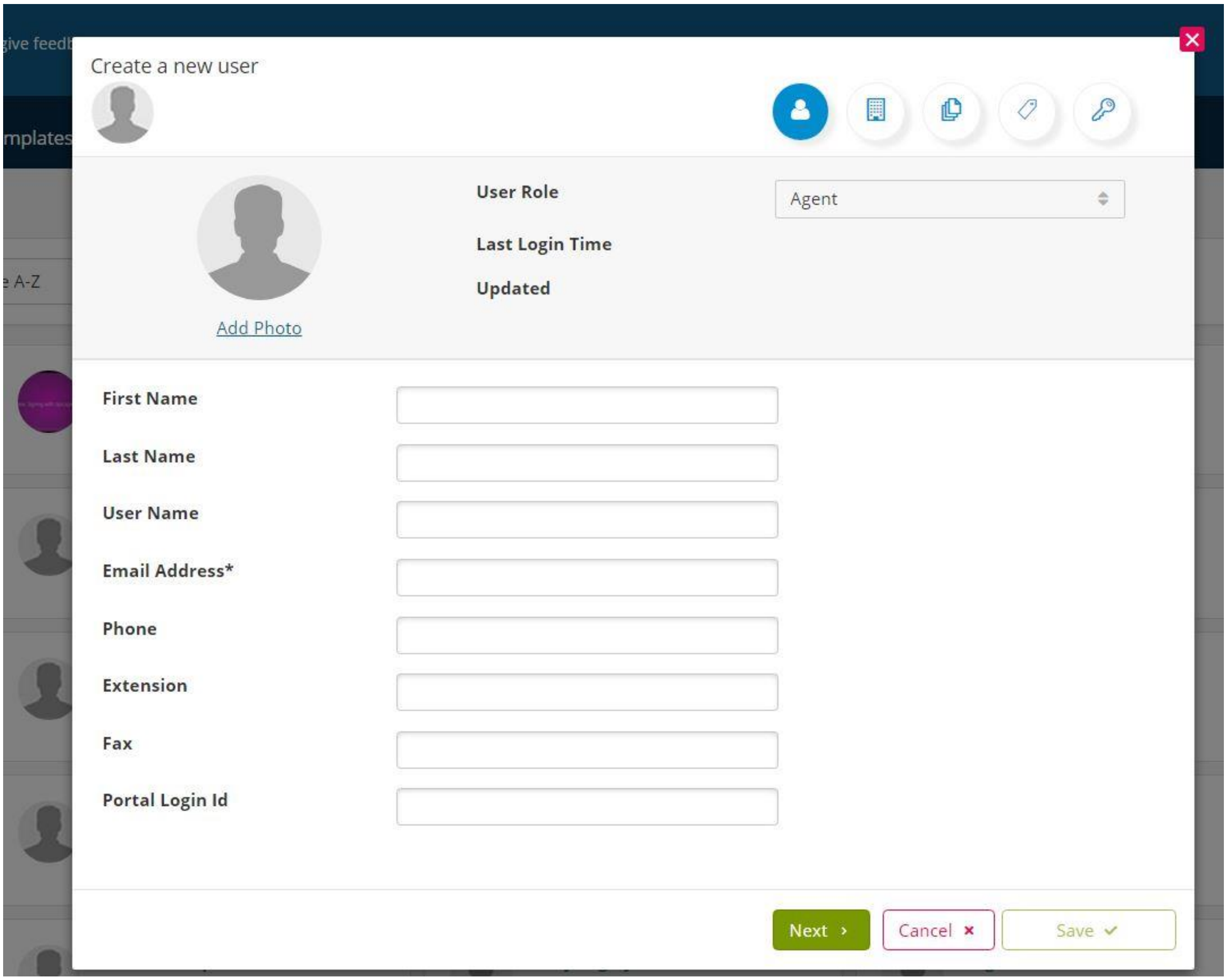
Once on the user list click on the "New" 

icon in the left top hand corner.



Once you click "New" 

you will then be able to fill in the credentials for your new agent and follow the steps. **You may also assign their role within the company as well.*



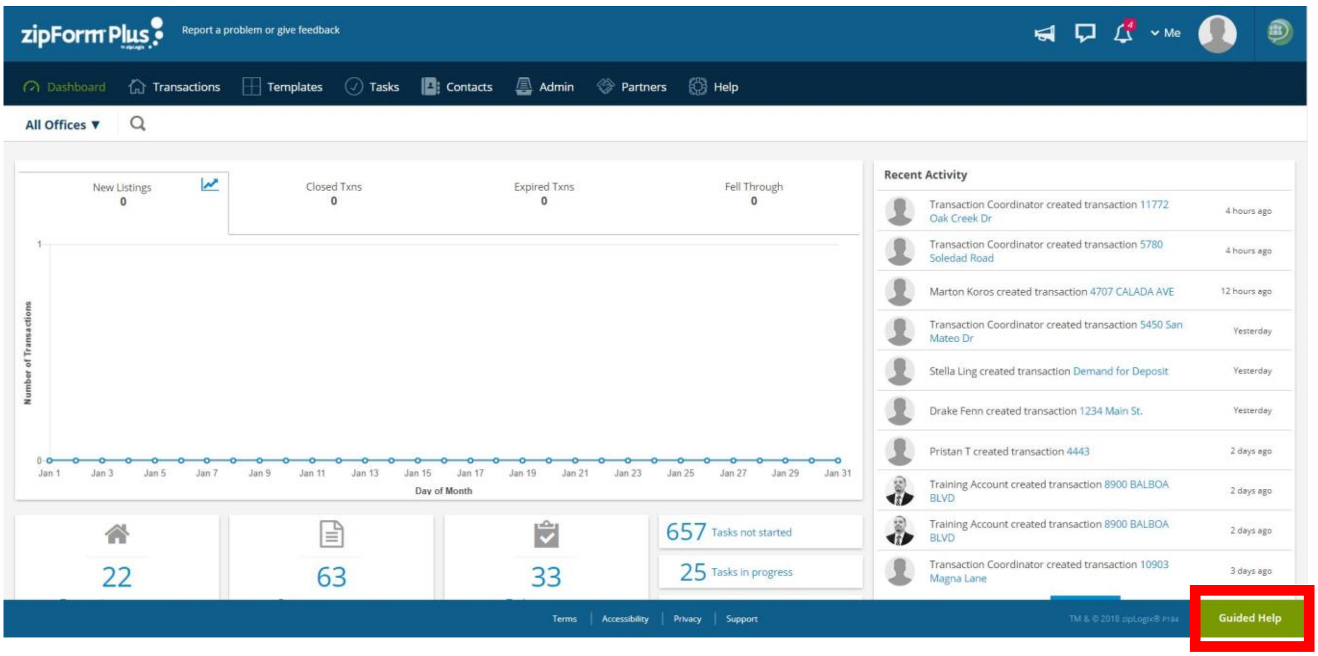
*Important: Keep the Portal Login ID field blank and be sure to check off the appropriate libraries under the Products tab. *

Once set up agents will receive welcome emails to set their password and are now ready to begin using zipForm® Plus!!

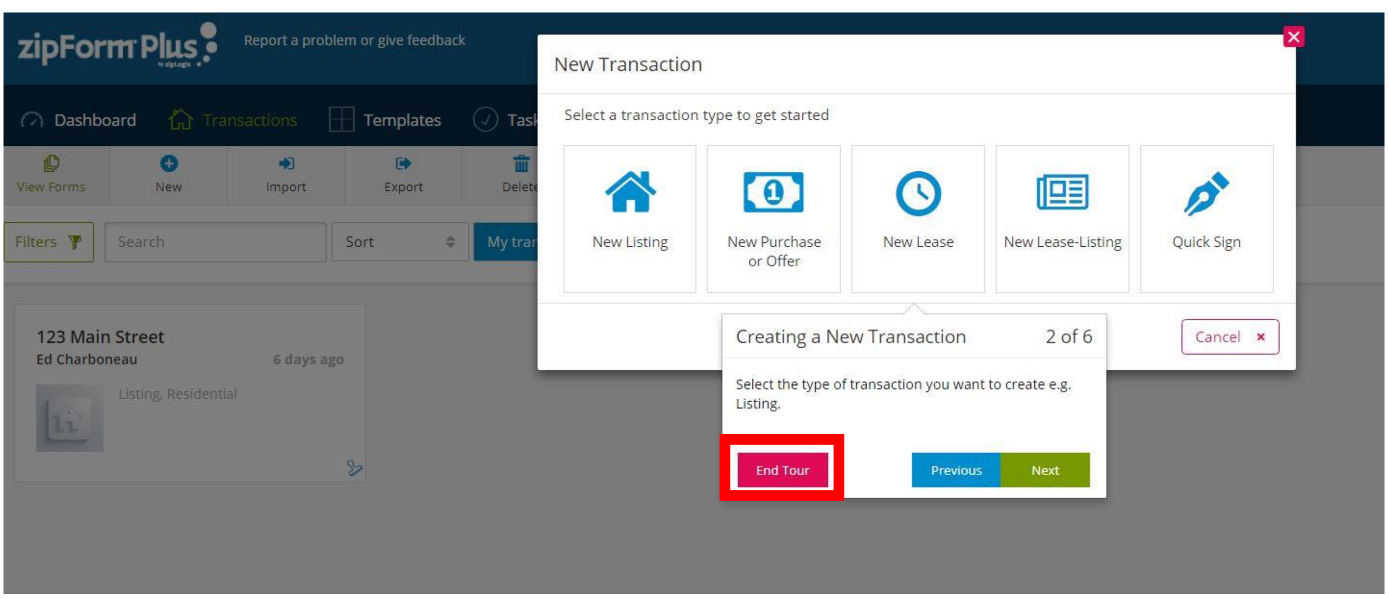
Guided Help

Explore the enhanced Guided Help feature and get step-by step instructions during your entire transaction creation process. Guided Help is available at the bottom right corner of the screen.

This will help guide the user through our application and is unique to the screen you are on.



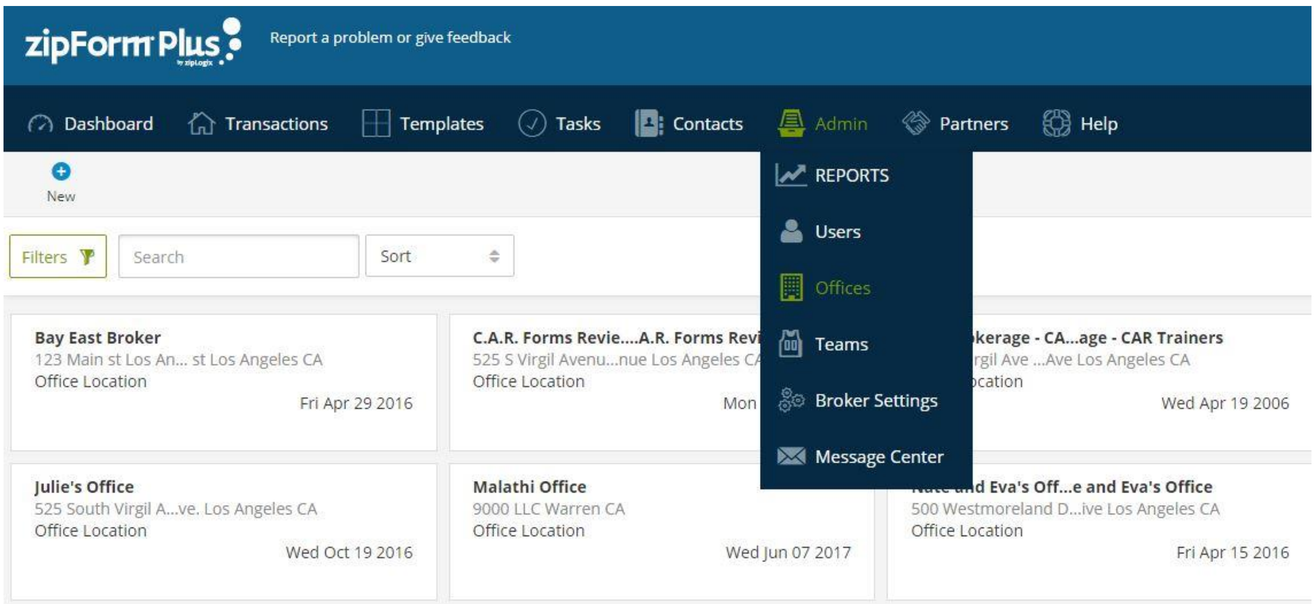
To end the Guided Tour at any time simply click the "End Tour" button on any of the guided steps.

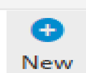


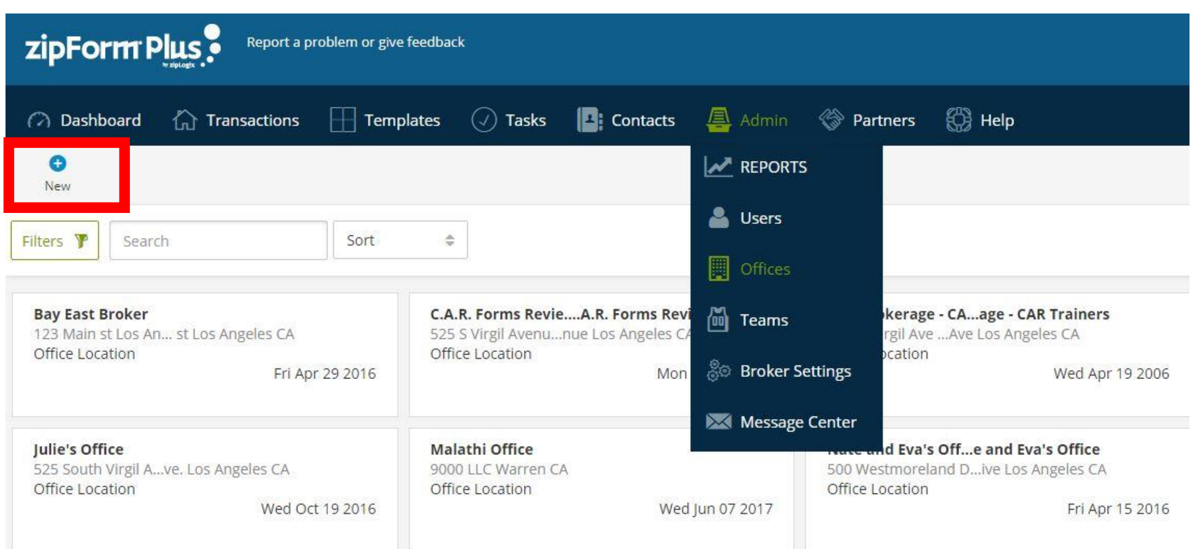
Office List

The ***OFFICE LIST*** grants Broker Administrators the ability to add office locations to their account. Once added, the offices will be accessible in the Dashboard, and Reports for individual locations as well as companywide reports can be run by the Broker to stay on top of all pertinent statistics. Permissions can be activated when creating new offices.

To add Offices to your new account, click on "Admin" and click on "Offices" from the drop down.

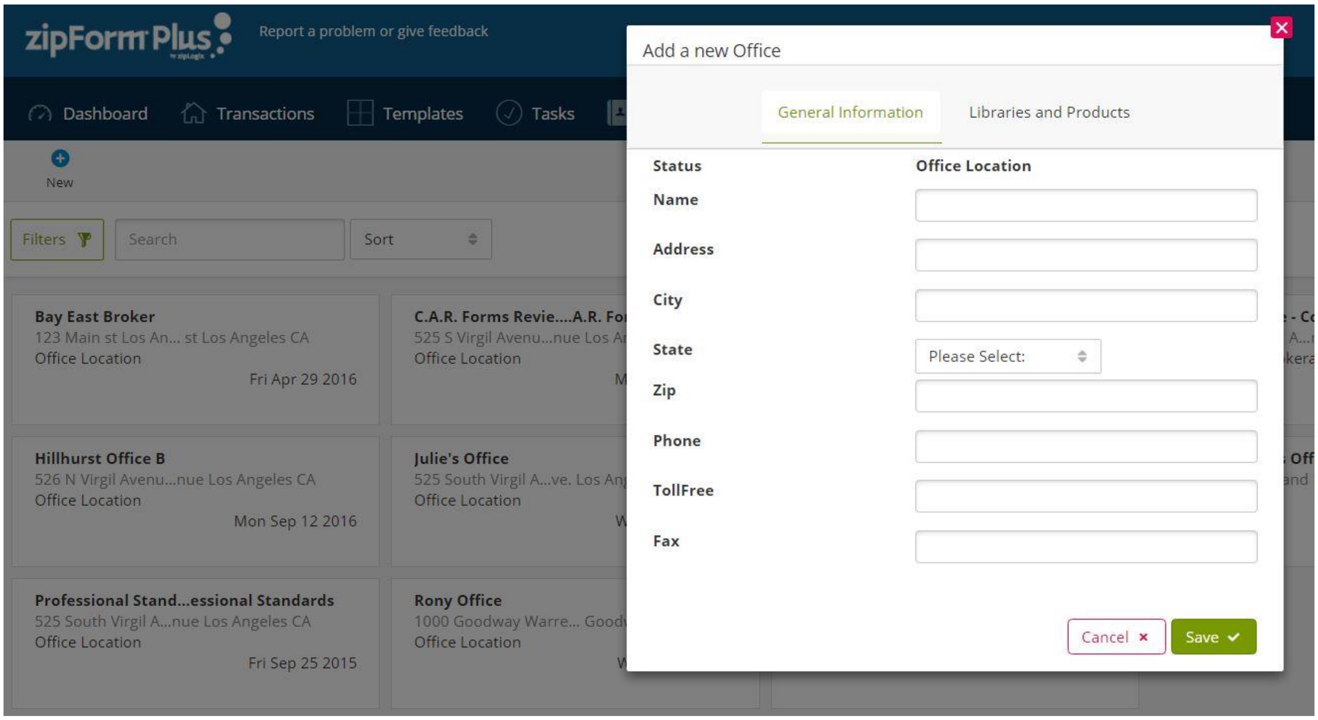


Once on the "Offices" list click on the "New"  icon in the left top hand corner.

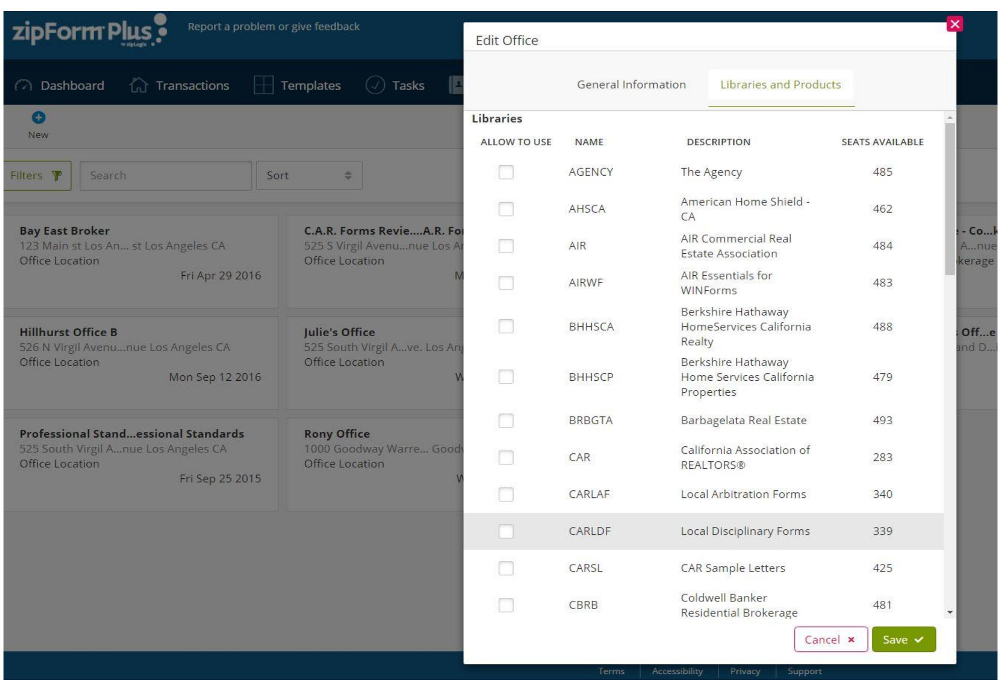


Once you click "New" 

you will then be able to fill in the credentials for your new Office and follow the steps.

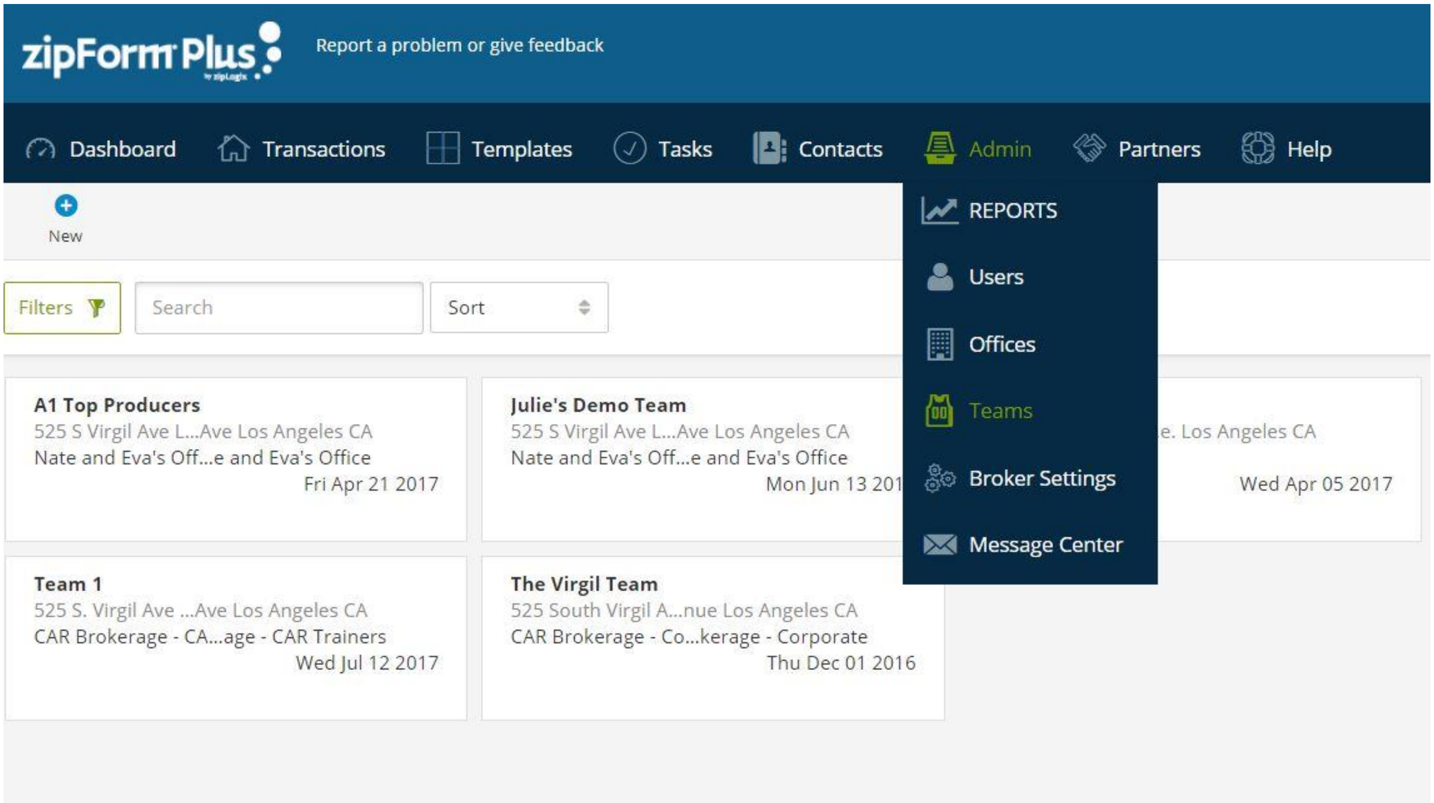


*Please note that the Libraries and Products tab will not be available until you save the new office. *



Team List

Brokers can add Team accounts within the Broker Edition account. This allows the brokerage oversight on Team transactions, while providing Team members access to each other's transactions. Teams can have varying roles within their Team account, supporting a smooth work flow. Brokerage templates and libraries are still available and can be required for team members within their Team Edition. zipForm® Plus Team Edition offers the flexibility and versatility that real estate teams offer their clients. Eliminate the repetitive paperwork with zipForm® Plus Team Edition.

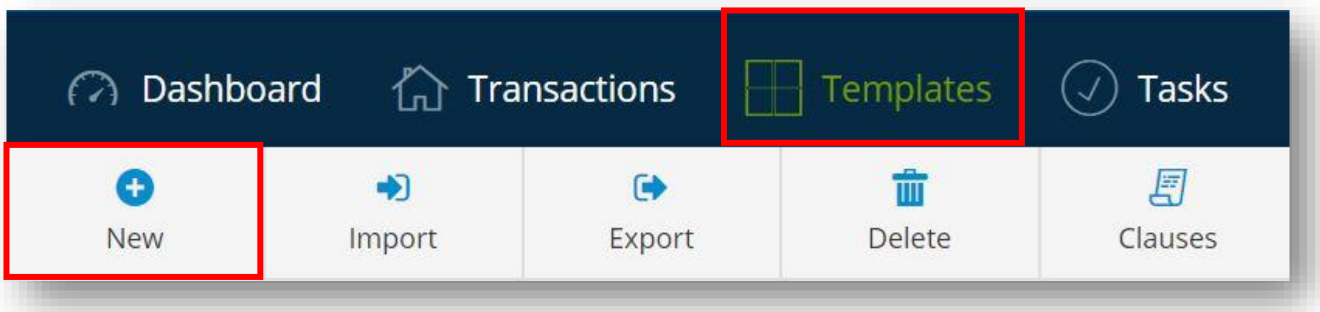


** The zipForm® Plus Team Edition is an add-on to your Broker Edition of zipForm® Plus. For more information on the Team Edition visit https://www.car.org/en/zipform/brokers/team **

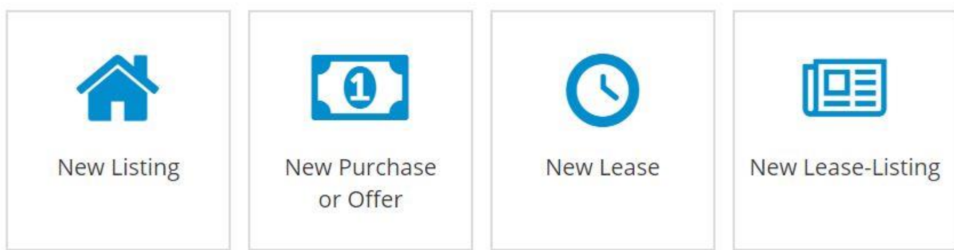
Broker Templates

You can create and apply Brokerage Templates inside the zipForm® Plus Broker Edition. A Template includes the desired Parties, Documents, and Checklists that your agents can apply to their transactions. By creating a template, you save time and reduce risk by ensuring that the correct documents are applied to a transaction every time.

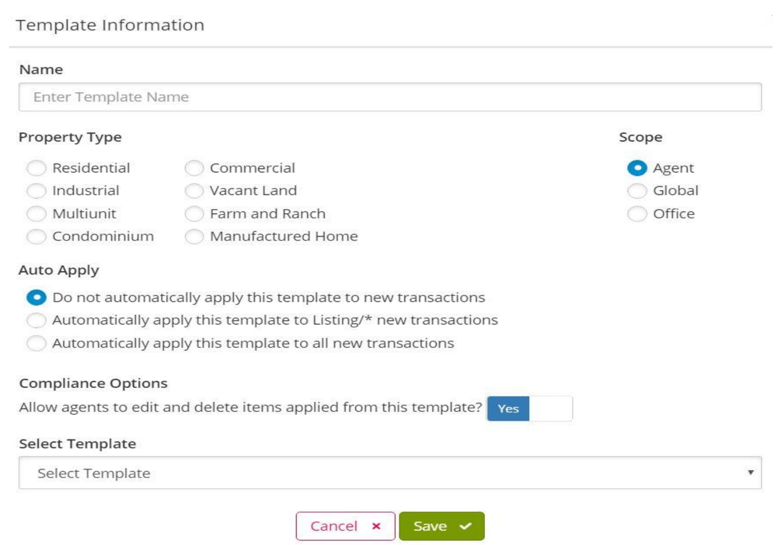
1. Log in to your zipForm Plus account. Select the **Template** tab, then select **New** to create a template.



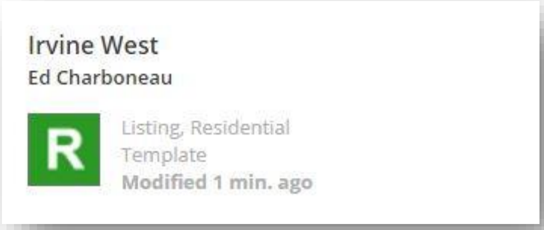
2. Select a template type to get started



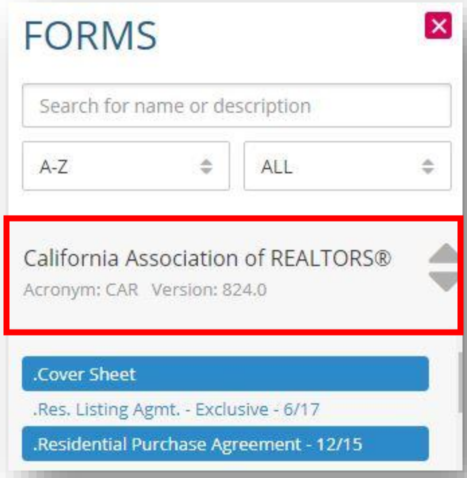
3. Create a **Template name**, specify the **property type**, **office** and **Auto Apply** options. **Save** your selections.

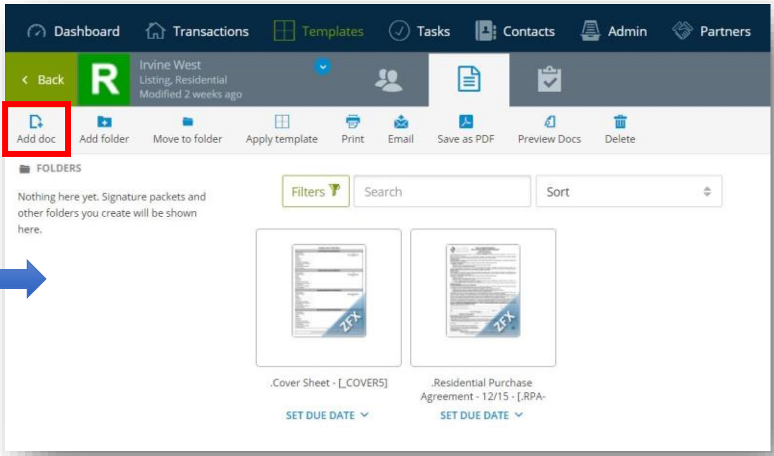


4. The template is now saved.

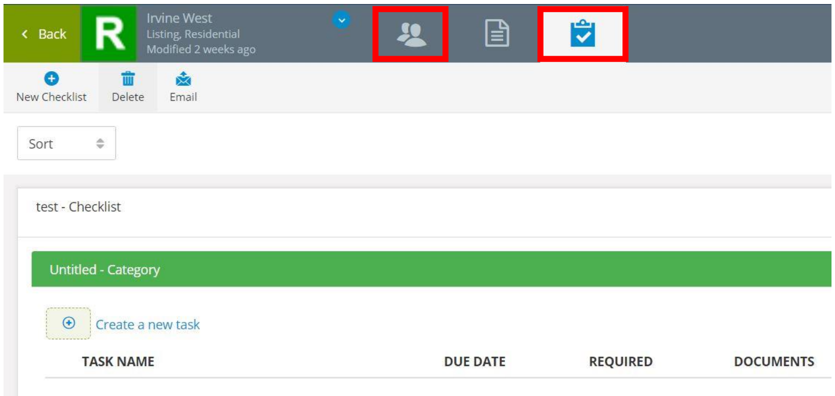


5. Add forms to your template by selecting from the library list at the right, or add external documents and placeholders as needed. Forms from your Brokerage Library may be added to Global, Office or Agent templates.





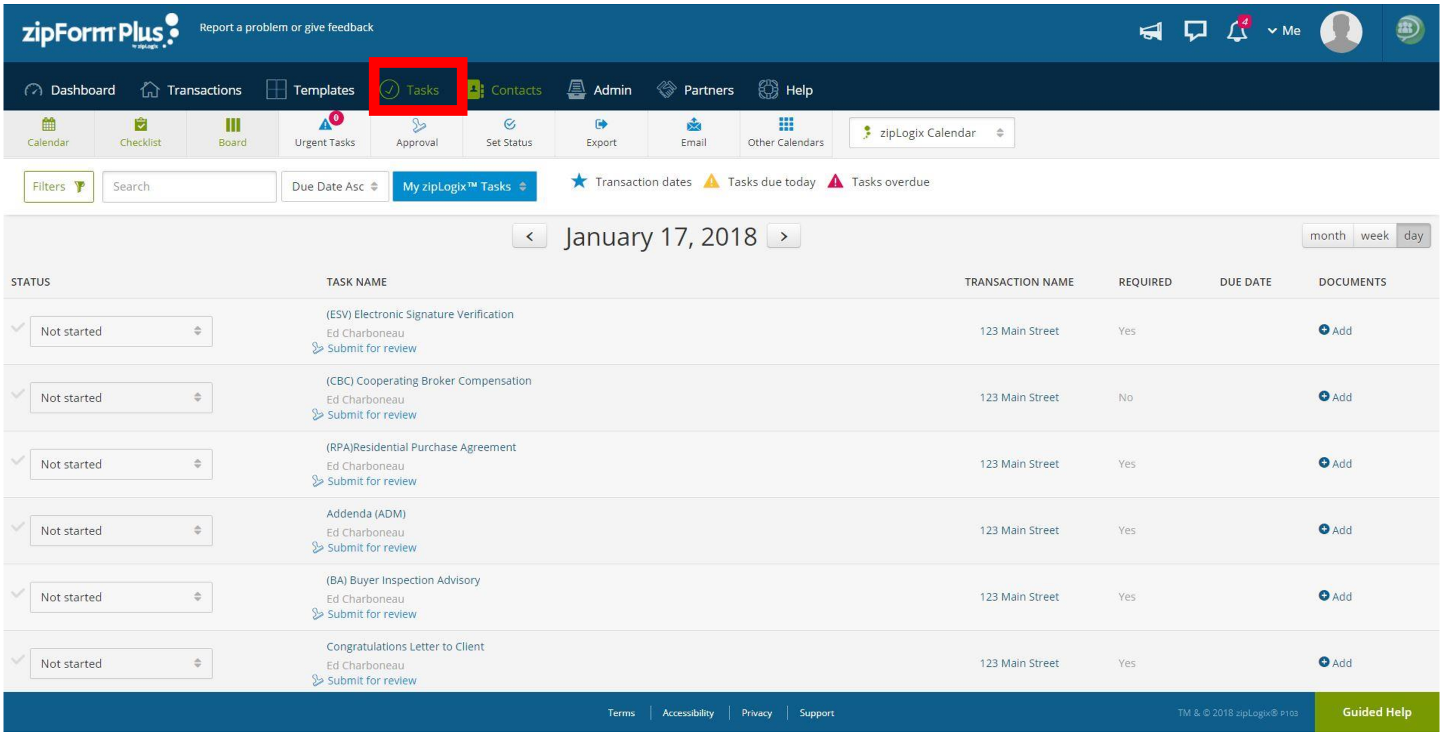
Note: Checklist and Parties can be assigned to Broker Templates.



zipTMS® Secure Online Transaction Management System

Keep all of your sales files organized and available anytime. zipTMS® allows you to work with your office, track tasks, complete contracts, and manage important documentation from one easy location.

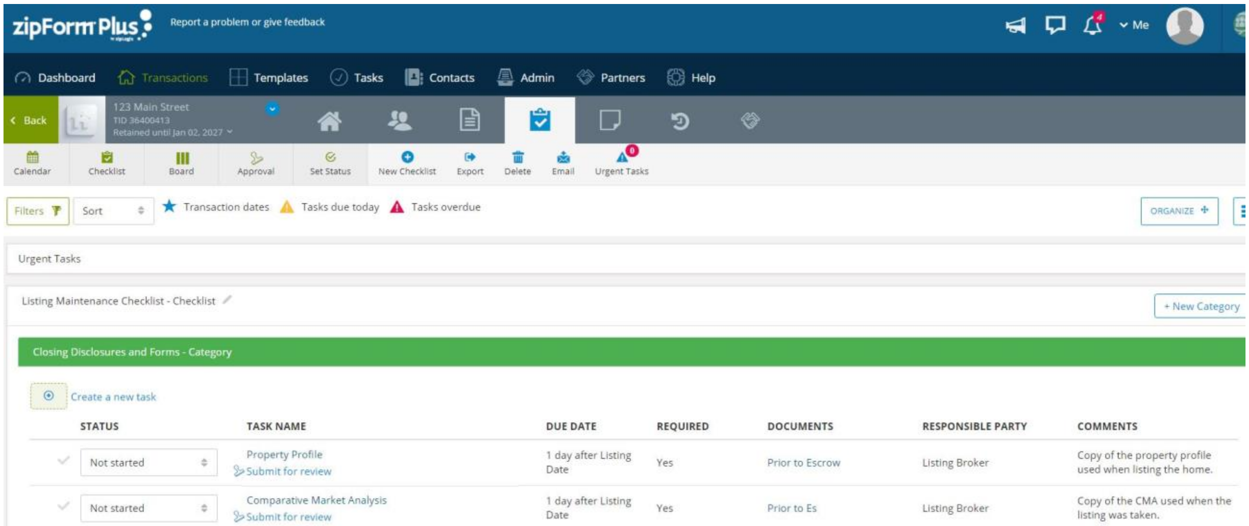
The Tasks page in zipForm® Plus is where users will find all of their upcoming, current, and past tasks in a Calendar, Checklist, or Status Board view. Administrators can use this to see all of the tasks from each user in the Broker Edition account. All of the tasks displayed are generated from the Checklist tab inside Transaction folders.



- Seamless integration with zipForm® Plus for ease of use
- Manage transactions with task checklists
- Create checklist templates for common transaction types
- Adjust the task view with calendar or list mode
- Manage all transactions at once with the overview dashboard
- Notifications assist you in staying on task
- Document transaction events like calls in transaction notes
- Transaction history records all tasks
- New roles and permissions available for brokerage accounts*

Tools for Managing and Sharing Documents in a Transaction

Instantly send documents, mark for approval, track due dates, or collaborate online.



zipTMS® Secure Online Transaction Management System

Calendar — Switch to a calendar view of tasks according to due date.

Checklist — List of the same tasks arranged in order of due date.

Board — View all of the tasks in progress, ready for review and completed.

Urgent Tasks — View all of the urgent tasks due or past due.

Approval — Agents quickly request approval and Administrators can mark approved accordingly.

Set Status — Adjust the status for multiple tasks all at once.

Export — Export Task to an ICS File to store on your Computer or external drive.

Email — Quickly E-mail Task to anyone.

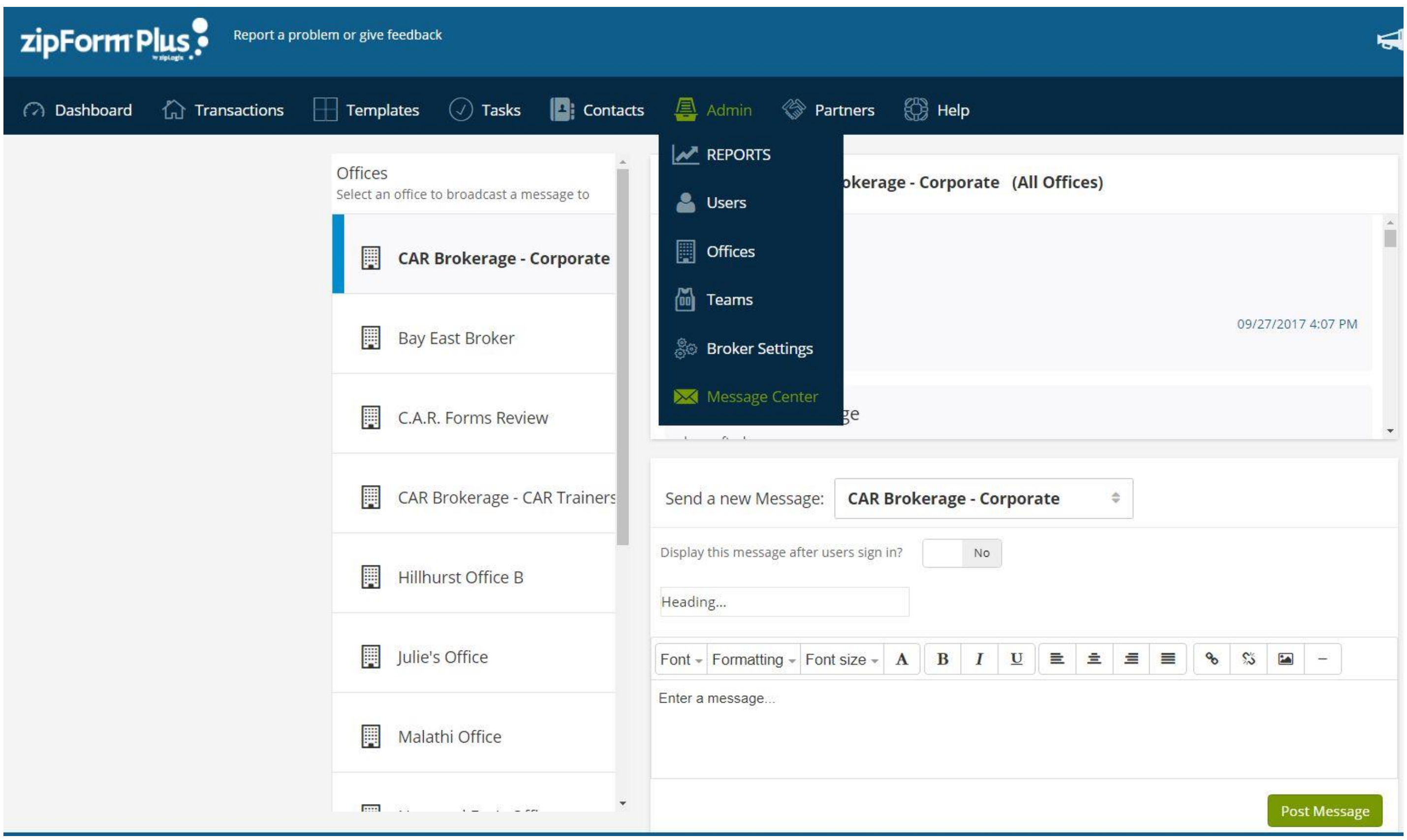
Other Calendars — View other external calendars inside zipForm®.

zipLogix Calendar | Google Calendar | Microsoft

Other Calendars available are zipLogix™ Calendar, Google calendar, and Microsoft.

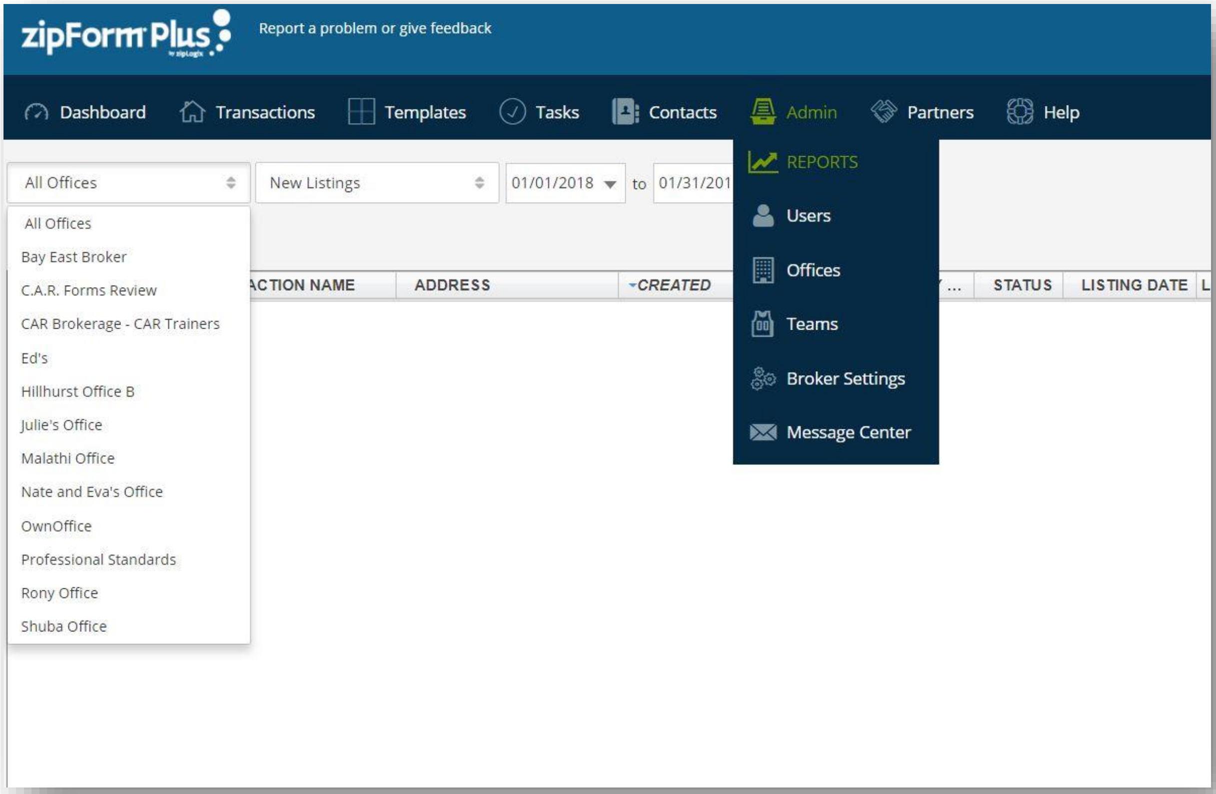
Message Center

Ever need to get an important message out to your entire brokerage? The ***MESSAGE CENTER*** allows administrators to broadcast messages to a particular office or to the entire brokerage. Messages will appear in the Notification area on both zipForm® Plus and zipForm® Mobile platforms. They can also be set to appear in a window that will display when the user signs into their zipForm® Plus account. To compose a new message, simply click the *Add a heading…* field and begin typing, or click the *Compose New Message* button. Compose the message like any email other message utilizing the available formatting buttons on the toolbar. To have old messages displayed, click the *Include Archived Messages* box.



Reports

There are reporting tools available to Administrators on the account. Click the ***REPORTS*** link, to generate a *New Listings Report* for All Offices (default setting). All Offices can be changed to Teams and Branches within a multiuser account. Reports can be run on New Listings, Closed Transactions, Expired Transactions, Transactions Fell Through as well as any of the following:



Monthly Transactions

Active Listings
Closed Transactions
Expired Transactions
Transactions Fell Through

Transaction Reports

Documents Submitted for Approval
Closed Transactions
Pending Transactions
Transactions Fell Through

Activity Reports

Documents Submitted for Approval
E-Sign Packets Waiting for Signature
Transactions Submitted for Approval
Transactions Approved
Transaction Activity

Checklist Reports

Tasks
Listings Expiring
Transactions Closing
Retention Removals

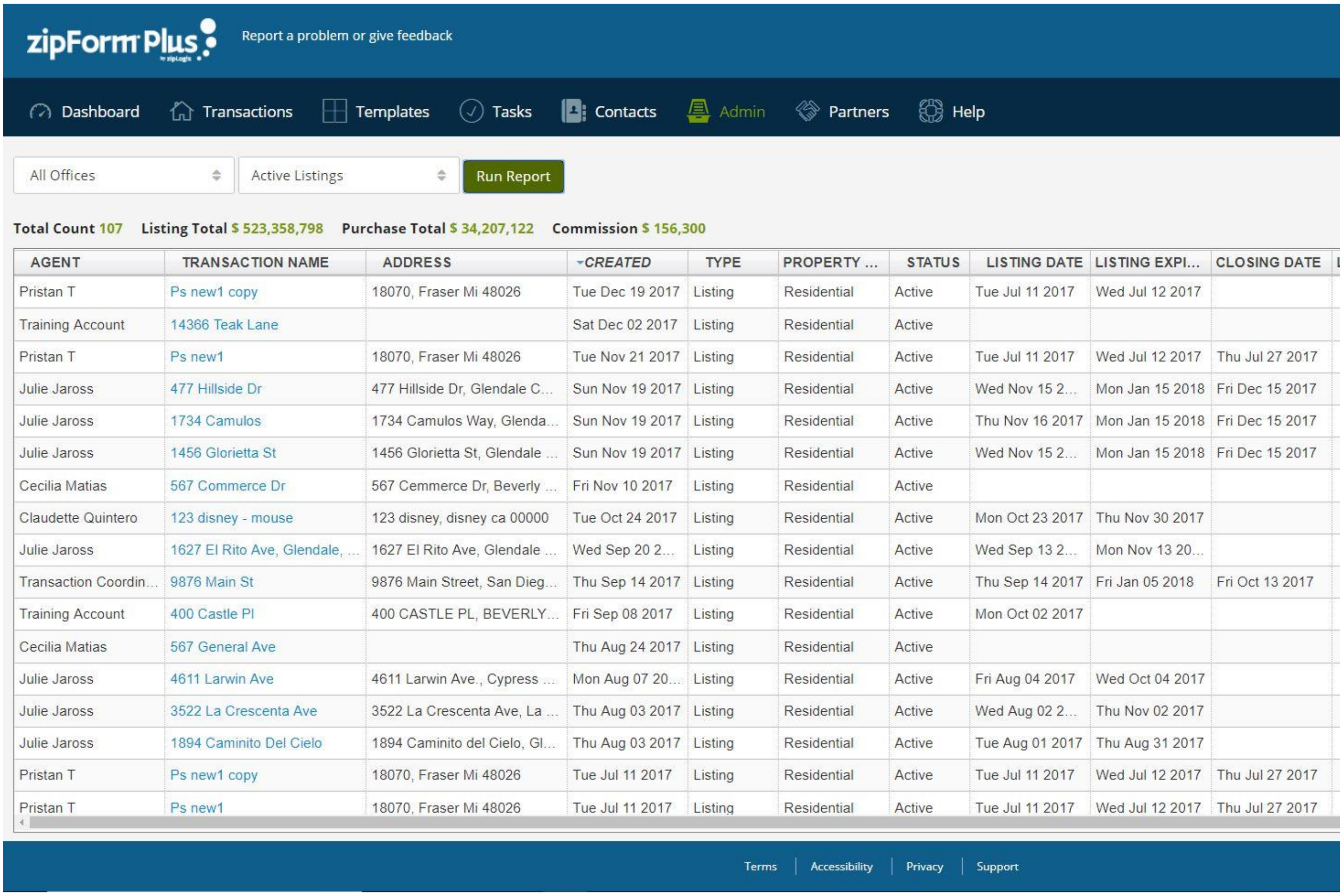
Performance Reports

Agent Performance

Account Reports

Users
Form Libraries
Products

Once your selection is made and your date range is set, click the *Run Report* button to view the report. Reports can be sorted by clicking the column headings. You can run reports for different offices by selecting a location from the All Offices list arrow. All reports can be easily exported as CSV (comma-separated values) files to be used in other platforms.



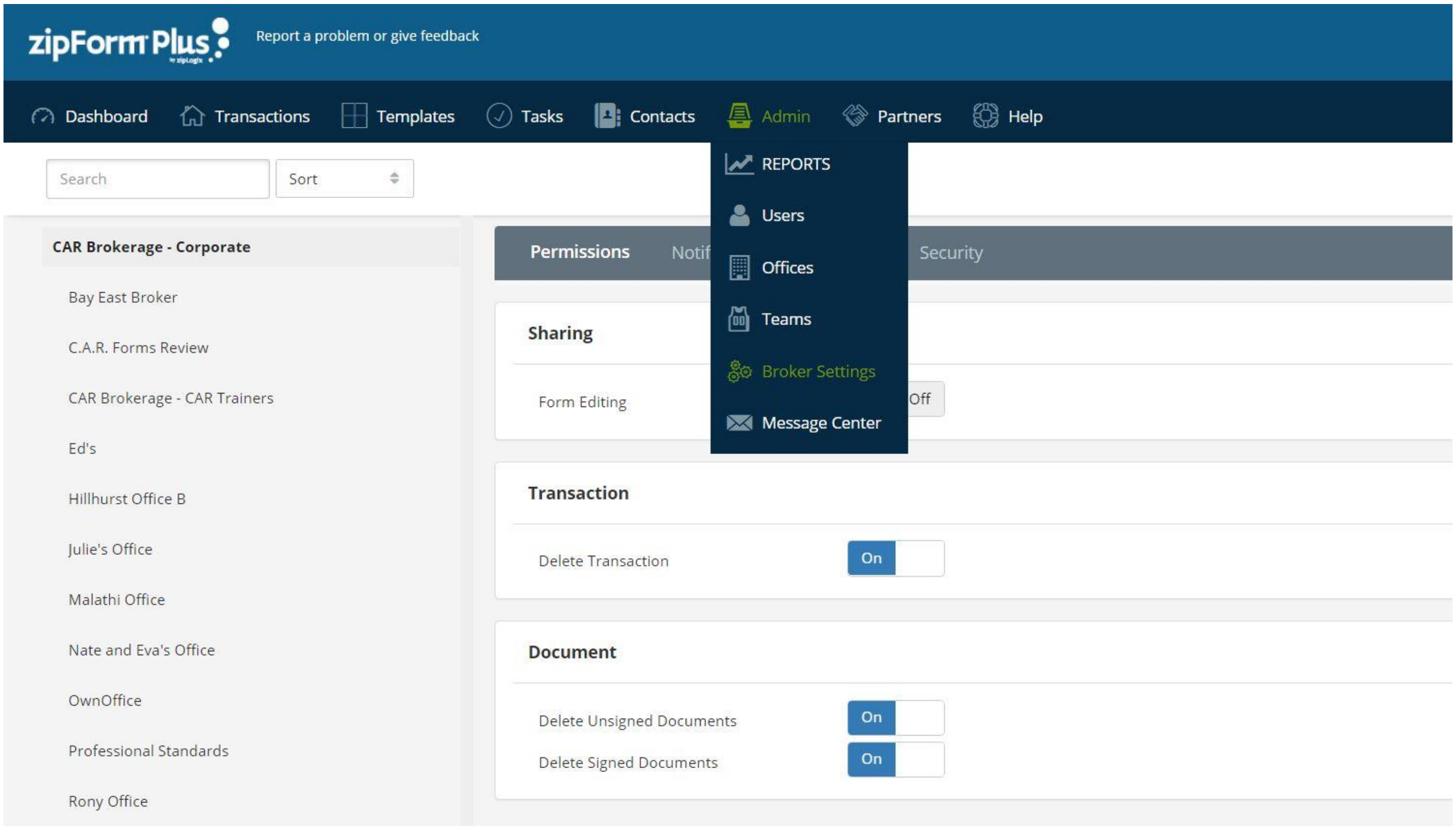
AGENT	TRANSACTION NAME	ADDRESS	CREATED	TYPE	PROPERTY ...	STATUS	LISTING DATE	LISTING EXPI...	CLOSING DATE
Pristan T	Ps new1 copy	18070, Fraser Mi 48026	Tue Dec 19 2017	Listing	Residential	Active	Tue Jul 11 2017	Wed Jul 12 2017	
Training Account	14366 Teak Lane		Sat Dec 02 2017	Listing	Residential	Active			
Pristan T	Ps new1	18070, Fraser Mi 48026	Tue Nov 21 2017	Listing	Residential	Active	Tue Jul 11 2017	Wed Jul 12 2017	Thu Jul 27 2017
Julie Jaross	477 Hillside Dr	477 Hillside Dr, Glendale C...	Sun Nov 19 2017	Listing	Residential	Active	Wed Nov 15 2...	Mon Jan 15 2018	Fri Dec 15 2017
Julie Jaross	1734 Camulos	1734 Camulos Way, Glenda...	Sun Nov 19 2017	Listing	Residential	Active	Thu Nov 16 2017	Mon Jan 15 2018	Fri Dec 15 2017
Julie Jaross	1456 Glorietta St	1456 Glorietta St, Glendale ...	Sun Nov 19 2017	Listing	Residential	Active	Wed Nov 15 2...	Mon Jan 15 2018	Fri Dec 15 2017
Cecilia Matias	567 Commerce Dr	567 Cemmerce Dr, Beverly ...	Fri Nov 10 2017	Listing	Residential	Active			
Claudette Quintero	123 disney - mouse	123 disney, disney ca 00000	Tue Oct 24 2017	Listing	Residential	Active	Mon Oct 23 2017	Thu Nov 30 2017	
Julie Jaross	1627 El Rito Ave, Glendale, ...	1627 El Rito Ave, Glendale ...	Wed Sep 20 2...	Listing	Residential	Active	Wed Sep 13 2...	Mon Nov 13 20...	
Transaction Coordin...	9876 Main St	9876 Main Street, San Dieg...	Thu Sep 14 2017	Listing	Residential	Active	Thu Sep 14 2017	Fri Jan 05 2018	Fri Oct 13 2017
Training Account	400 Castle Pl	400 CASTLE PL, BEVERLY...	Fri Sep 08 2017	Listing	Residential	Active	Mon Oct 02 2017		
Cecilia Matias	567 General Ave		Thu Aug 24 2017	Listing	Residential	Active			
Julie Jaross	4611 Larwin Ave	4611 Larwin Ave., Cypress ...	Mon Aug 07 20...	Listing	Residential	Active	Fri Aug 04 2017	Wed Oct 04 2017	
Julie Jaross	3522 La Crescenta Ave	3522 La Crescenta Ave, La ...	Thu Aug 03 2017	Listing	Residential	Active	Wed Aug 02 2...	Thu Nov 02 2017	
Julie Jaross	1894 Caminito Del Cielo	1894 Caminito del Cielo, Gl...	Thu Aug 03 2017	Listing	Residential	Active	Tue Aug 01 2017	Thu Aug 31 2017	
Pristan T	Ps new1 copy	18070, Fraser Mi 48026	Tue Jul 11 2017	Listing	Residential	Active	Tue Jul 11 2017	Wed Jul 12 2017	Thu Jul 27 2017
Pristan T	Ps new1	18070, Fraser Mi 48026	Tue Jul 11 2017	Listing	Residential	Active	Tue Jul 11 2017	Wed Jul 12 2017	Thu Jul 27 2017

Important Note:

The same criteria that applies to the Dashboard will also be required for Reports. Utilize the question marks on the Dashboard to see what is required in transaction paperwork for that data to populate in reports.

Broker Settings

The broker settings tab under the Admin drop down, allows Brokers to set and change settings for the zipForm® Plus Broker Edition platform. You will be able to change Permissions, Notifications, General and Security settings for all Offices in you zipFrom® Plus Broker Edition account.



Permissions

Sharing – Form Editing
Transactions - Delete
Document – Delete Unsigned
Document – Delete Signed

Notifications

Transactions – Status Change
Place Holders – Filled or Not
All Required Placeholders Filled

General

Document Approval
Chat Logging

Security

Extra Sign In Security
2-Step Verification