



# zipForm® Plus

by zipLogix

## BROKER EDITION

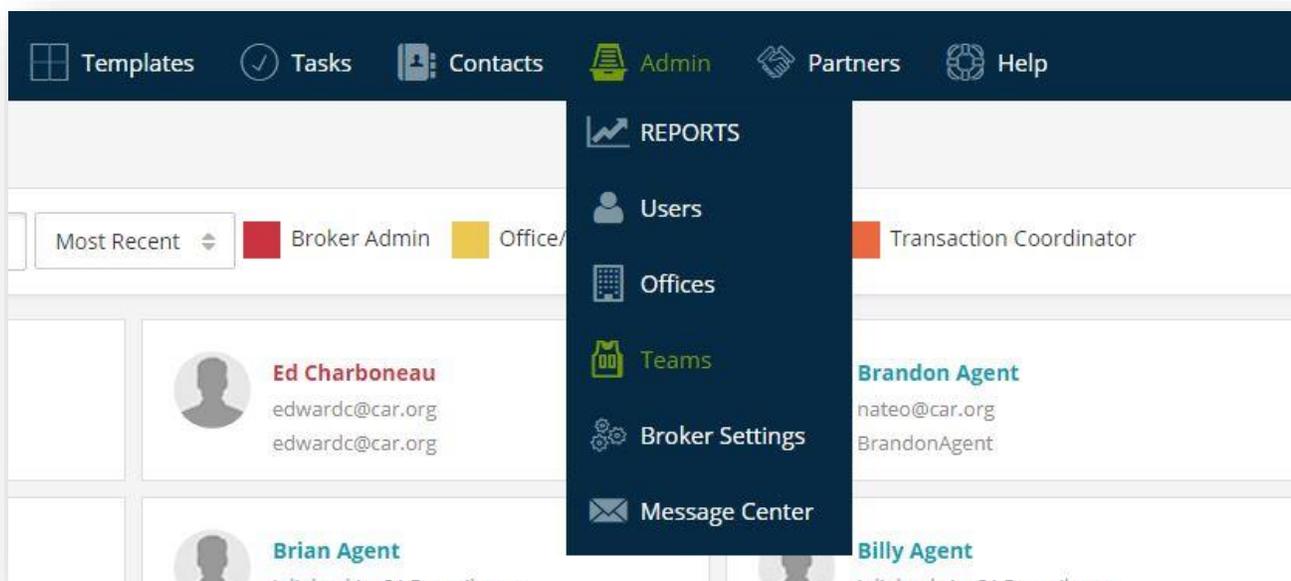
### zipForm® Plus Broker/Team Edition

zipForm® Plus Broker/Team 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.



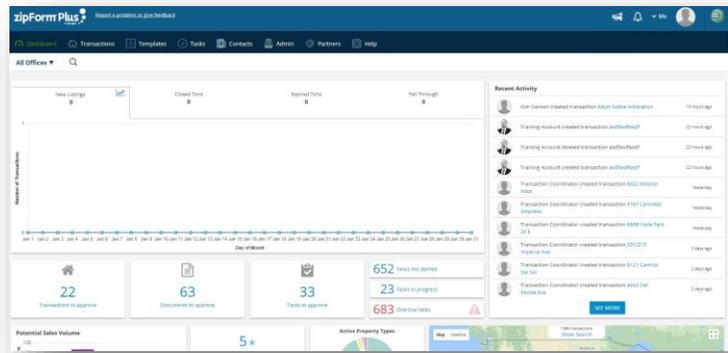


## Dashboard

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.

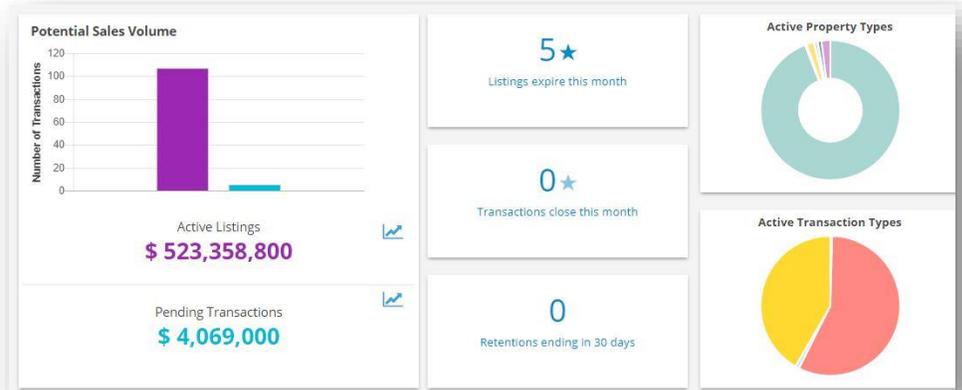
The Dashboard is made up of different widgets that helps the office better manage transactions in the following areas:

- ✓ 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.

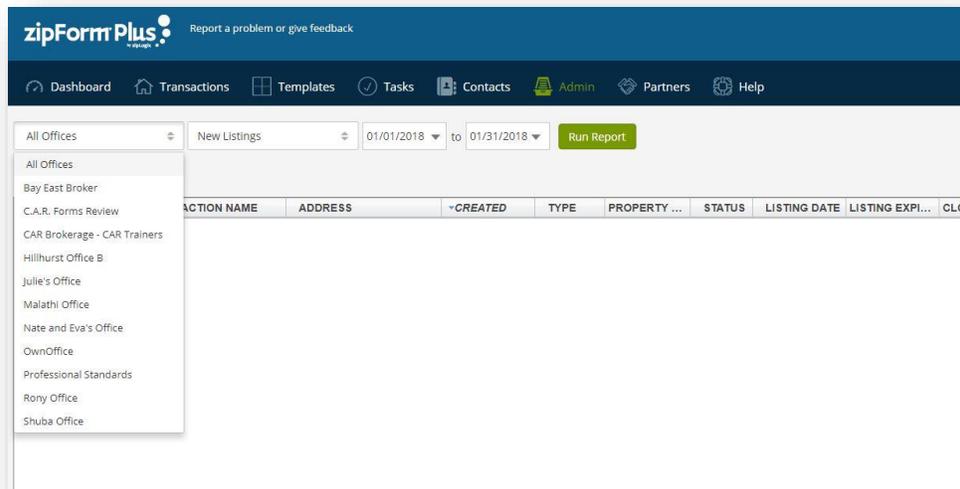
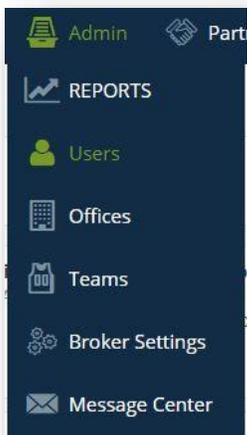
Question mark icons on the left side of each section provide Help information on the criteria needed to populate each widget on the Dashboard.





## 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



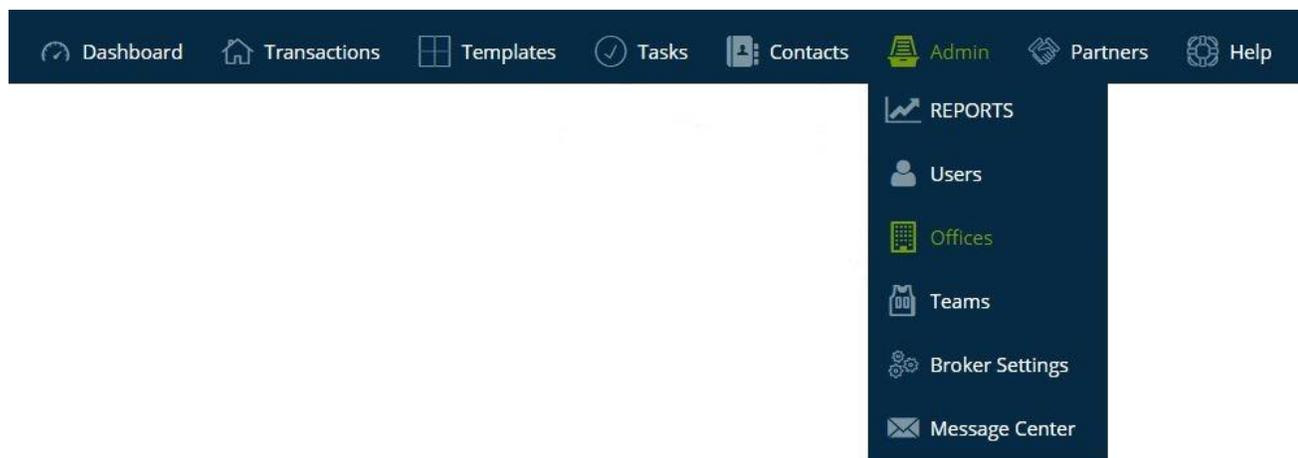
Once your selection is made and your date range is set, click the *Run Report* button to view the report. Reports can be sorted by clicking the column headings. You can run reports for different offices by selecting a location from the All Offices list arrow. All reports can be easily exported as CSV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

The screenshot shows the zipForm Plus interface with a report for 'Users'. The table displays the following data:

NAME	ROLE	LIBRARY	EXPIRATION
Agent, Sally	Agent	California Association of REALTORS®	Fri Sep 29 2023
t_ag	Agent	California Association of REALTORS®	Fri Sep 29 2023
		Local Disciplinary Forms	Fri Sep 29 2023
		California Association of REALTORS - Non Member	Fri Sep 29 2023
		CAR Sample Letters	Fri Sep 29 2023
		Coldwell Banker Residential Brokerage	Fri Sep 29 2023
		Digital Ink Subscription	Tue Jan 01 2019
		zipForm® Base Service	Fri Sep 29 2023
		zipForm Plus Non Member	Tue Jan 01 2019
A_tony_A_user	Agent	AIR Essentials for WINForms	Fri Sep 29 2023
		California Association of REALTORS®	Fri Sep 29 2023
		California Association of REALTORS - Non Member	Fri Sep 29 2023
		Digital Ink Subscription	Tue Jan 01 2019
		zipVault®	Fri Sep 29 2023
		HomeGuard HomeWarranty	Fri Sep 29 2023

## 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.



## 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:

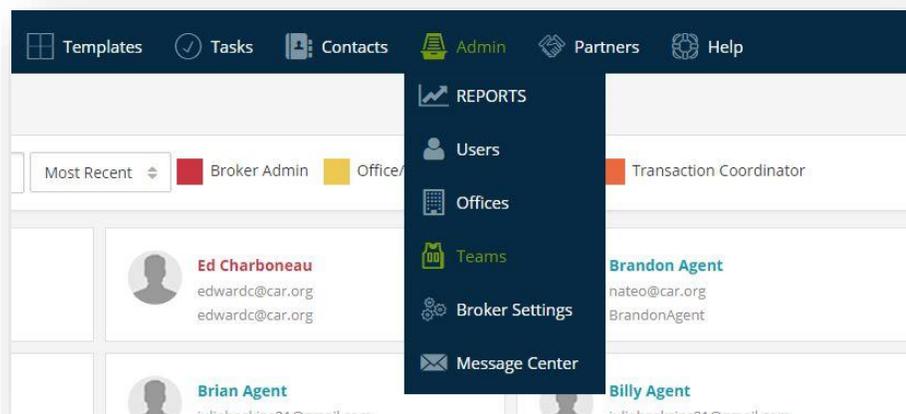


**Broker Administrator:** Are able to manage all agent accounts, transactions, offices (if any), form access, transaction reports, and templates for the entire zipForm® Plus Brokerage.

**Location Administrator:** Are able to manage agent files and user accounts below them at their specific location.

**Agent:** An individual user able to create transactions and manage his/her personal account. Admins are able to see agent's transactions and templates, but are not able to view the agent's contacts.

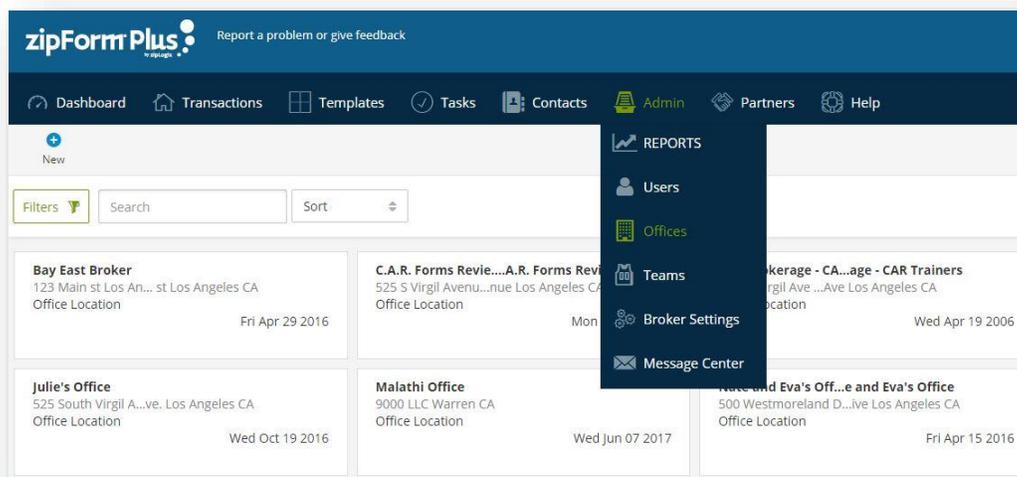
**Transaction Coordinator:** Transaction Coordinators work on behalf of an agent(s). Their profile settings grant permissions to edit existing agent files at one office or multiple office locations at any level (Broker, office, etc).



**Important Note:** *Corporate Location* is for administrative use only and all agents are automatically assigned to this office. All agents should be assigned to at least one other office in addition to the **Corporate Location**.

## Office List

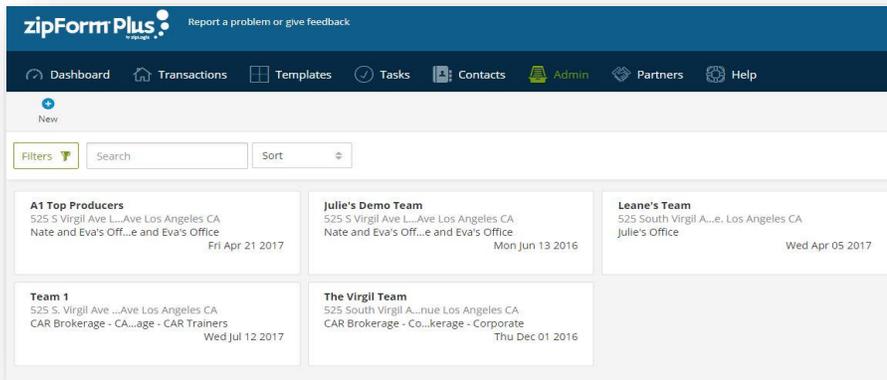
The **OFFICE LIST** grants Broker Administrators the ability to add office locations to their account. Once added, the offices will be accessible in the Dashboard and Reports allowing the Broker to stay on top of all statistics by running pertinent reports from any location. Permissions can be activated when creating new offices.





## Team List

The **TEAM LIST** houses teams created to provide agents collaboration ability. Users added to a team can work with one another more efficiently to close Transactions. Users can also be assigned to multiple teams for an even broader collaborative workflow.



## 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.

