

## **User Guide**



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## About zipTMS<sup>®</sup>

## Interpretended Amplitude Amplitud

zipTMS<sup>®</sup> provides quick tracking of essential file needs throughout the course of the transaction online, allowing you to track the property sale on the go. Use zipTMS<sup>®</sup> to take your file with you, from the listing presentation to the close of escrow and beyond.

The unique, REALTOR<sup>®</sup>-designed tools and easy-to-use interface allow real estate professionals of all levels stay informed and connected to their forms and contracts.

### Forms integration

zipTMS<sup>®</sup> integrates directly with zipForm<sup>®</sup> Plus, creating a single, easy access point for live forms and document storage. With seamless access to live forms through zipForm<sup>®</sup>, the Official Forms Software of the NATIONAL ASSOCIATION OF REALTORS<sup>®</sup>, any agent can begin to track and store complete transaction files online.

### Seamless e-Sign access

Contracts and files saved on zipTMS<sup>®</sup> can instantly be sent for signatures to anyone with an email address using direct integration with zipLogix Digital Ink<sup>®</sup> and DocuSign<sup>®</sup>. Send, track, and store and organize signed documents all from any zipTMS<sup>®</sup> transaction file.

## About zipLogix<sup>™</sup>

zipLogix started with a vision - to 'Go Beyond' business as usual and streamline the forms process freeing real estate professionals from repetitive paperwork. A vision of a mobile, more efficient agent able to access information quickly and easily; free to focus on the art of the deal. zipLogix took that vision and created a suite of innovative products that has virtually transformed an industry.

Today, the zipLogix family of tech-savvy products is the recognized industry standard for electronic real estate forms and transaction management system that are currently used by more real estate professionals than any other real estate software programs.

zipForm<sup>®</sup> offers MLS Integration, Association Partnerships, Special Agent and Broker Tools and Packages, Online/Offline Programs, TMS Integration and Electronic Signatures.

In addition to zipForm, zipLogix offers zipTMS<sup>®</sup>, the online transaction management tool that is changing the way real estate professionals conduct business. This online transaction collaboration tool streamlines workflow and connects agents to clients through a secure, custom website 24/7.

zipLogix provides transaction solutions to today's busy real estate professionals that are designed to enhance the value of services they deliver to their clients while improving productivity and efficiency.



## **Frequently Asked Questions**

#### Q: What does TMS stand for?

A: TMS stands for Transaction Management System

#### Q: Do I need to download a plugin or application to use zipTMS<sup>®</sup>?

**A:** No. zipTMS<sup>®</sup> works within your browser, without needing any plugins, applications, or special software. It is recommended that you have a current version of Adobe PDF to ensure that you can easily view or preview transaction documents and forms.

#### Q: What does a zipTMS<sup>®</sup> do that zipForm<sup>®</sup> does not do?

A: zipTMS<sup>®</sup> works seamlessly alongside zipForm<sup>®</sup> Plus, and adds the ability to **track deadlines, both within and across transactions, through a calendar or checklist view**. Its features also include **online collaboration**, **online document management**, and **archiving and storage for closed files**.

#### Q: Can I use zipTMS<sup>®</sup> with the other agents in my brokerage (or with my Team)?

**A: Yes!** Visit <u>www.car.org/en/zipform/brokers</u> for more information about zipForm<sup>®</sup> Plus Broker Edition, or visit <u>www.car.org/zipform/brokers/team</u> to sign up for zipForm<sup>®</sup> Plus Team Edition.

#### Q: Does zipTMS<sup>®</sup> integrate with electronic signatures (e-Sign)?

**A: Yes**. zipTMS<sup>®</sup> allows you to send documents or forms to any signer using the e-Sign provider of your choice. Choose zipLogix Digital Ink<sup>®</sup> or DocuSign in your zipTMS<sup>®</sup> Profile to enable the ability to securely send for easy, click-to-sign signatures.

#### Q: Can documents on zipTMS<sup>®</sup> also be signed in person (without emailing)?

**A: Yes**. Using the zipForm<sup>®</sup> Mobile app, you can sign documents from zipTMS<sup>®</sup> in person at any time using your tablet and the Touch Sign<sup>™</sup> feature built in to zipForm<sup>®</sup> Mobile.

#### Q: Can I keep a communication log on zipTMS<sup>®</sup>?

**A: Yes.** In addition to the ability add documents to scan, fax, or upload a copy of your communication log for a transaction, there is also the ability to enter **Notes** to keep a communication log within the **History** tab of the transaction. You can also email forms into zipForm<sup>®</sup> with the **Email to Txn** tool.

#### Q: Is zipTMS<sup>®</sup> safe and secure?

**A: Yes.** Not only does zipTMS<sup>®</sup> meet very high and strict safety standards, it also comes with the assurance of over twenty years of experience helping real estate agents work safely and securely online.

zipLogix<sup>™</sup>, the creator of zipForm<sup>®</sup> and zipTMS<sup>®</sup>, is a subsidiary of Real Estate Business Services, Inc. (REBS) and is a joint venture between REBS and the NATIONAL ASSOCIATION OF REALTORS<sup>®</sup>. Learn more at <u>www.ziplogix.com</u>



## Help at a Glance : zipTMS<sup>®</sup> Tasks

## Secure Online Transaction Management

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

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Urgent Tasks					×
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Sun Mon	Tue	Wed	Thu	Fri	Sat
Transaction Dates	26 27 Date of Contract Offer Date	Com	pleted Task	v Wire Earnest Money	2 3
4 ✓ Schedule Physical Inspection	<sup>5</sup> Task		8 Schedule Appraisal		9 10
11	12 13	14	15	10	5 17

The zipTMS<sup>®</sup> **Tasks** page provides a comprehensive calendar of important events for every file. Use the **Search and Sort** tools to change between list view and calendar view, view urgent tasks, and instantly find tasks by name or category.

Tasks include due dates, appointments, document deadlines, and template tasks from your transaction files. zipTMS<sup>®</sup> helps you stay on schedule with your tasks through **Notifications** and the **Urgent Tasks** list. In addition to the tasks, important **Transaction Dates** are displayed on your calendar or task list. Click to switch the **Calendar View** to Month, Week, or day.

Each **Task** is color-coded, based upon its checklist category, and **Completed Tasks** are easily identified by a green check mark next to the task name. Click on a task name to open any task to view the **Task Details**, or click and drag to change a task due date.

#### Edit Task

Updates to file tasks are easily managed.

- 1. Edit the Task Name
- 2. Change the Due Date
- 3. Toggle task completed status

(A **Relative** due date is a date which depends upon a **Transaction Date**)

- 4. Add or edit Comments
- 5. Remove or attach Documents
- 6. Save Changes





## **Creating an Account**

## Signing up for zipTMS<sup>®</sup> as an Individual Agent

If you are an individual agent, you can sign up for your zipTMS® account through your association website, or <u>www.car.org</u>.

With zipTMS<sup>®</sup>, you are storing documents and tasks securely in the cloud, which means that you will always have access to your tasks, contacts, and documents – the keys to your transaction success.

### Brokerage and Team Agents: Set Password Email

If you are an agent within a brokerage or team account, you will receive an email from <u>noreply@ziplogix.com</u> prompting you to set your password for your account. Click the link inside the email, or copy and paste the provided link in order to set up your password for accessing zipTMS<sup>®</sup> at <u>www.zipformplus.com</u>.

To sign in, use the password that you set up along with the username entered by the admin for your brokerage or team when creating the account.

### Sign In

Your username and password unlock your transaction files. Sign in through <u>www.car.org</u>, or Broker and Team Edition users can log in at <u>www.zipformplus.com</u> using the username and password that you created.

zipForm Plus	Welcome to zipForm® Plus Enter your username and password to continue	
	Username Password	
	Sign In Forgot username   Forgot password	
	Terms Accessibility Privacy Support	TM & © 2018 zipLogix®



## **Transaction Files**

## The TRANSACTIONS Page

Create online files which you can track from anywhere.

The TRANSACTIONS Screen is the first page you see in zipForm<sup>®</sup> Plus. It offers the ability to quickly find, start, or navigate through any transaction files.

A Transaction File is a stored set of documents, checklists, and transaction history which can be managed quickly and easily online. Each file represents a unique client and property combination. Multiple files for a single property or client can easily be tracked or searched, in order to provide customizable deadlines and personalized information for each property contract.

A comprehensive real-time search keeps all transaction files at your fingertips, and quickly finds files by the file name, client name, or property address as soon as you start typing.

Use the tools at the top to start a new transaction, or quickly find files with real-time search and personalized file views.

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Dashboard      Transactions     Prevent     New Import     E      Filters     Search     Sort	Transactions       ontacts       Partners       Shop       i         rport       Delete       View RPR       Txn Tools       Tools <ul> <li>My transactions</li> <li>Search and Son</li> </ul>	acksonb@car.org Jackson Beaudelaire California Association of Realtors 525 South Virgil Ave Los Angeles CA 90020 **This is an Individual Agent English \$
Bob Buyer and Betty Buyer Jackson Beaudelaire Just now Purchase, Residential Bob Buyer, Betty Buyer Closing Mon Apr 02 2018	123 Main Street, Los Angeles, CA 90080 Jackson Beaudelaire 12 mins. ago Usting, Residential Bob Buyer Steve Seller Closing Fil Mar 30 2018	view Profile Sign Out o
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Your zipForm® Plus profile is always accessible in the top right of the screen. It can be opened at any time to personalize zipForm® Plus by adding your picture, email signature, connecting to accounts with other services, and customizing your notification settings.

The clear, modern tools in zipForm® Plus keep essential information available at all times.

Add a new transaction Step 1: Select New (J) Tasks Contacts Partners 👸 Help Dashboard Templates 📰 Shop ø Ð • • م Txn Tools ◄ 童 View RPR Expor Delete Filters **Y** Sort ۵ Search



- Step 2: Select the Transaction Type
- Step 3: Enter a Name for the file to make it easy to find later
- Step 4: Select the Property Type
- Step 5: (Optional) If available, select the Template (saved checklist and documents) you wish to use on the transaction
- Step 6: Use MLS Connect to push listing data into a new transaction directly from the MLS
- Step 7: Click Save







**Templates** 

within the template.

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the Broker or Team editions.

A new transaction that starts with a **Template** 

Templates can be created by agents, brokers,

or users with the Administrative privileges in

might contain pre-selected forms, dates and transaction information, and pre-set checklists

or tasks, depending upon what was set up

## zipForm® Plus Managing Documents

### Inside the File: Documents

The Documents tab is one central location to manage, store, and share documents and edit zipForm® contracts.



## Add a Document

Save a computer file, such as a word document, online inside of your transaction file.

- Step 1. Click the Add Doc button
- Step 2. Click Browse
- Step 3. Select the document from your computer
- Step 4. Enter a Document Name
- Step 5. Click Save

#### Complete a Document Placeholder

- Step 1. Click the Document Placeholder
- Step 2. Click Browse
- Step 3. Select the document from your computer
- Step 4. Click Save

#### Email or Fax Documents

Send documents to anyone easily and quickly right from zipForm<sup>®</sup> Plus.

- Step 1. Click Send
- Step 2. Select documents to send and sending method (email or fax)
- Step 3. Enter the email address or fax number of the recipient
- Step 4. Click Send



## Add a Due Date for a Document

Keep track of important deadlines by adding a due date to any document. Specify a fixed calendar date, or select a date that is contingent upon an important contract date.

Relative dates can be any number of days before or after important contract dates. For example, a contingency removal date can be set for 17 days after the Purchase Agreement Date.

- Step 1. Click Set Due Date
- Step 2. Select whether the due date is Fixed or Relative
- **Step 3.** Select the calendar date for a fixed date, or enter the number of days before or after an important contract date, or enter "0" if it is due the same day *Note: Contract Dates can be entered or edited from the Property tab or when updating forms in the file.*

Step 4. Click Save

Contract dates are added to your calendar and tasks list under the **Document Due Dates** Checklist, and labeled with the category **Documents**.

### 🖌 File Menu

The file menu includes advanced tools, such as the option to email or fax to your transaction, options to connect to additional services, and the option to save this file as a template for future use.

#### CALIFORNIA ASSOCIATION OF REALTORS a 🖓 🖁 Transaction Details Actions 123 Main Street Los A / Transaction Details 22038 Toledo Street, Los Angeles CA File Menu Email to transaction Email Listing, Residential Jackson Beaudelaire Copy Buyer Bob Buyer Save as template Seller Steve Seller 💼 Delete Created Tue Jul 12 2016 Import from archive Updated Yesterday Filters 🍸 🛛 Search == Export to archive nize 🕁 sidential Purchase Agreement - 12/15 Retention Date Wed Jul 12 2023 Lock ver Counter Offer #1 - 11/14 18 Iul Status Prospect Show form versions Transaction ID 20304798 Send to Other System • Fri Mar 30 2018 Closing Go to Realtors Property Resource® Fax ITransaction fax cover 💬 Forms Advisor Forms Tutor

## Email or Fax to zipForm<sup>®</sup> Plus

Send a document, or invite someone else to send a document, to be delivered to your file.

Step 1. Click the file menu button 🕑

#### Step 2. Select Email to Transaction or Fax Coversheet

**Step 3.** Send to the person who will be emailing or faxing the document(s) to the transaction. This can include sending to yourself.





## File Checklist

## Inside the File: Checklist Tab

The Checklist tab is an easy guide to tasks and deadlines for the transaction file. Click the Checklist tab within a transaction file to view the tasks, documents, or calendar for this file.

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<ul> <li>Back 123 Main Street, Los Angeles, </li> <li>Back TID 20304798 Retained until Jul 12, 2023 </li> </ul>	Parties 🖹 Documents 🖻 Checklist	File Checklist Tab			
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Transaction Dates					
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Documents - Category					
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✓ In progress	Attention A Mar 16, 201	18 No Buye	r Counter Offer #1 - 11/14 Unassi		

From the checklist, you are able to manage documents, deadlines, and tasks.

Tasks are sorted into Checklists and color-coded custom categories within a checklist.

### Add a Task

Tasks remind you of important events, milestones, or steps to be completed for this transaction. They can be added individually, or added by applying a template that contains tasks. Tasks can be organized by custom checklists or categories.

- Step 1. Click New Task
- Step 2. Enter a Task Name
- Step 3. Choose the Task Category
- Step 4. Attach Documents or placeholders (reminders to add specific documents in the future)
- Step 5. Click Save

			Category	
Order Preliminary Ti	tle Report	2	Escrow 3	4
ue Date			Required	
None	O Fixed	<ul> <li>Relative</li> </ul>	Yes	
1 Days	After 🗢	Offer Acceptance.		
esponsible Party			Status	
Listing Broker - Lucy	Listers	\$	Not started	÷
Notify responsible pa	arty when due	No		
ocuments			Comments	
Attach Documents - Title Prelim	4	×	Call Title Rep to order the report	



## Add a New Checklist

Create and name a new checklist to organize tasks.

- Step 1. Click New Checklist
- Step 2. Enter the Checklist name
- Step 3. Click Save

Use this checklist to stay organized when adding new tasks to the file.

## Add a color-coded category

Use categories within checklists to further organize tasks and make it easy to identify needs whether looking at the category or list view inside the transaction.

- Step 1. Click New Category
- Step 2. Select the Checklist that this category will belong to
- Step 3. Enter the Category name
- Step 4. Select the category Color
- Step 5. Click Save

Use this category to stay organized when adding new tasks to the file.

## Send the Calendar or Task List

Email a PDF of your calendar view to anyone.

- Step 1. Click the Send button
- Step 2. Preview the document
- Step 3. Click the Send button (blue envelope) for email options
- Step 4. Enter the email address, subject, and message for the email
- Step 5. Click Send







New Category

Checklist

		Transaction Paperwork 🍦
Category	3	Disclosures
Select Color	4	5 Save 🗸
		5 Save 🗸

### Calendar View

The Calendar view creates an easy way to see upcoming deadlines by month, week, or day.

Tasks are color-coded based on category and can be edited or updated right from the calendar view.



Click once on any task to view the task details and quickly mark as Complete, Edit or Delete a task.

### Change a task date on the calendar view

Click and drag to change a task date on the calendar view

- **Step 1.** Click on the task or contract date in the calendar view
- Step 2. Drag and drop that task or contract date to another day in the calendar view
- **Step 3.** The task date or contract date is automatically updated

## Urgent Tasks

Urgent tasks are tasks that are overdue or due today that have not yet been marked as completed. Easily see a summary of all of your urgent tasks by clicking the **Urgent Tasks** bar at any time.

Clear an urgent task by marking it complete. Click the urgent task symbol under the **Done** column to mark a task as completed.

The Urgent Tasks bar can also be used to quickly view a summary of tasks. Click a document name under the **Documents** column to view a document attached to an urgent task.



## **History and Notes**

### *Inside the File: History Tab*

The **History** tab works 24/7 behind the scenes, tracking important events for a complete transaction record. Add **notes** to complete the communication log for any file.

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🔿 Dashboard 🏠 Transactions 🖽 Templates 🕗 Tasks 📑 Contacts 🗇 Partners 📼 Shop 🚯 Help		
< Back 123 Main Street, Los Angeles, 🕥 12 20304798 Reamed until ut 2, 2023 ~ # Summary 😤 Parties 🖹 Documents 🖻 Checklist 🗋 Notes 🄊 History History Tab		
Filters 🕐 Search and Sort		
Jackson Beaudelaire April 4, 2018 4:03 PM [ Pacific Daylight Time ]     completed this task: "Schedule Physical Inspection"		
Jackson Beaudelaire April 4, 2018 4:02 PM [ Pacific Daylight Time ]     completed this task: "Buyer Counter Offer #1 - 11/14"		
Jackson Beaudelaire         April 4, 2018 2:57 PM [ Pacific Daylight Time ]         History Event           has added the placeholder "Title Prelim".         History Event		
Ackson Beaudelaire April 3, 2018 9:31 AM [ Pacific Daylight Time ] has updated the transaction details.		Show More
Jackson Beaudelaire March 27, 2018 2:14 PM [Pacific Daylight Time]     has updated the transaction details. Transaction Status changed to: prospect		
REPART OF ACCESSIBILITY PRIVACY THIS FORMS SOFTWARE AND TRANSACTION MANAGEMENT SOLUTION IS BROUGHT TO YOU BY TErms Accessibility Privacy Support	FM & © 2018 zipLogix® P212	Guided Help

Instantly Search or Sort through the history log to find important events and milestones for this transaction.

Each **History Event** highlights the user's name, event details, and providing additional information, such as the ability to **View Form Changes** if a form is edited using the collaboration tool.

### Add Notes

Track events outside of online transaction activities.

Step 1.	Click on the
	Notes tab
Step 2.	Click New
Step 3.	Type note text
Step 4.	Save changes

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# zipForm<sup>®</sup> PlusTools

## Reference Guide for Toolbars

Documents Toolbar



#### Apply Template

Add a saved standard set of forms, folders, documents, tasks, and contacts.



#### Add Document

Upload a document to store it online with this transaction file.



#### Save as PDF

Save a form as a PDF in this file or to your desktop to preserve a copy of this form in its current state.



#### **Send** Email or fax documents and forms (as PDFs) to anyone – no special equipment or accounts required.



e-Sign Send forms or documents for signatures via zipLogix Digital Ink<sup>®</sup> or DocuSign<sup>®</sup>.



#### Share

Share forms and documents online with anyone while tracking editing and viewing history.



#### Copy PDF

Copy a PDF document from this file to another transaction file.

### Task Toolbar



#### View Calendar

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



#### **New Checklist**

Label a new checklist (set of categories and tasks).



#### Email

Print or Email a PDF of the checklist as an email attachment to a person of your choosing



#### Delete

Select individual items, such as tasks or categories in order to delete them.



#### Urgent Tasks

View all of the tasks coming due or past due.



#### **Transactions Toolbar**



#### New Start a new Transaction file.

#### Delete

Select files to delete. Please note, deleting a file from the Transactions List will delete the forms, documents, and links to zipLogix Digital Ink<sup>®</sup> signed documents for this file. After clicking delete, you will be prompted to select files to delete. Delete by clicking the Delete button. Click Cancel to exit out of the delete screen, and return to the main Transactions List options.





#### Import

Import a downloaded file to your transaction files.



#### Export

Select files to download to your computer, saving them offline for backup or archives



#### Mortgage Calculator

Calculate rates or payments, or download an amortization table for fixed rate loans.



## Support

## Product support

C.A.R. Contact Center 213-739-8227 Monday-Friday: 9:00am – 4:45pm PST

http://www.car.org

zipLogix<sup>™</sup> Help Desk: 586-840-0140 Monday-Friday: 24 Hours Weekends and Holidays: 10am-10pm ET

http://support.ziplogix.com

Sales: Email :: <u>sales@ziplogix.com</u> Fax Number :: 586-790-7582

Website: www.zipLogix.com

Mailing Address: P.O. Box 130 Fraser, MI 48026

Office Location: 18070 15 Mile Road Fraser, MI 48026

## Broker/Team Edition Support

213-739-8227 Monday-Friday: 9:00am – 4:45pm PST

http://www.car.org

