ZipForm®*Online* Broker Account Guide

Welcome to your ZipForm®*Online* Administrator Account! ZipForm®*Online* offers many powerful tools to allow administrators to customize their accounts. Administrative features may be accessed at any time by clicking on the [Administration] link at the top of any page in ZipForm®*Online*.

Account Setup

Before you can access your Brokerage account, the ZipForm support team will do the following to it set up for initial use:

- Create the Corporate (main) office location.
- Create one Broker Administrator account. The Broker Administrator will be attached to the Corporate location.
- Enter a limit on the total number of seats that will be allowed to use your account. "Seats" is a term used to describe the number of users that can be attached to the brokerage account – one user, one seat.

  When all of the seats are "filled", the Broker Administrator cannot add more users until some users are removed. Additional seats may be purchased.
- Assign to your account access to one or more libraries. Some libraries may be given limited seating depending on the specifics of your contract. The "base service" is an administrative record required in each account to run the ZipForm®*Online* application itself.

Locations – My Company Information

Not every brokerage will require multiple sales office locations.

If you will use locations in your brokerage account, however, it is important to set them up *before* you create users. The reasoning is that you will be required to associate your users with a location when they are created.

All ZipForm®*Online* brokerage accounts will have at least one location – this being the Corporate location that is created by the ZipForm support team to open your account.

If you intend that all of your agents will operate out of a single office, you will attach all of your users to the Corporate office, and you will not need to create additional locations. You can skip ahead to the Users section below.

Adding Locations

If you are going to use sales office locations in addition to the Corporate office to manage your users, it is important to add these locations before adding users.

To add a location, choose [My Company Information] at the top of the page.

From the Location List page, add a location by clicking the Add Location button.

> *NOTE. Only a Broker Administrator is able to add a location.*

General Information. On the Add Location page you will be able to fill in information about the location: location name, address, city, state, zip, phone, toll free phone and fax. The proper status value is defaulted to "Office/Location."

Click the Save button to store the location or click Cancel.

Finding a Location

When you log into ZipForm®*Online* as an administrator, you are placed in the Agent List page by default. However, you can access your Location List page by clicking [My Company Information] at the top of the page.

All of your locations may not be visible on one page. If more than one page of locations is returned, an option is available at the bottom of the page to move to other pages. Click on the appropriate page number or select the [Next] option.

By design, only a limited number of pages will be returned. This speeds up the data retrieval process. The recommended technique is to always use the Find Location filter.

Using the Find feature is quick and easy. Locations may be found by their name or address or status. Most, if not all, locations will be "Office/Location" status. Find a specific location by filling in some criteria in one or more of the fields provided. You can use partial values in these fields. Click the Go button to find the matching locations. Use the Reset button to reset the filters to their default state.

Working with Location Actions

On the Location List page, you can choose an action to operate on a specified location. On the right side of the page you see a Select Action drop-down list box next to each location. Choose a location to work with, open the list box at the right end of the line and choose an action.

- *View*. Opens the View Location page. You can view the location information, but you cannot edit it. Click OK.
- *Edit*. Opens the Edit Location page. You can edit any of the location information. Click the Save button to make the change or click Cancel.
- *Delete*. Opens the Delete Location page. You can view the location information and delete the location if desired. Click the Delete button to remove the location or click Cancel.

<u>NOTE</u>. Although not recommended, a location may be deleted while users are assigned to it. In this case, because users are also associated with the Corporate location, these users will continue to be visible to the Broker and Office Administrators. A Broker Administrator is able to reassign these users to another location if desired, or an Office Administrator can assign them to their location.

The Location Name Prints on the Form Footer

There is a relationship between the Location name and the information that is printed in the footer of a form.

As a Broker Administrator you can use the [My Company Information] function to find the locations linked with your brokerage account. These will be listed on the Location List page. By choosing the Edit action, you can change any of the location information including the name. (On the Edit Location page you will only see the "Location Name.")

When a user creates a transaction, the location information that shows up on the footer of each form in that transaction will flow from the location to which the user is assigned.

Users – Agent Manager

User Roles

Broker Administrators - A ZipForm®*Online* brokerage account consists of some number of users and – optionally – sales office locations with a Broker Administrator managing them. The Broker Administrator is responsible for managing users, offices, templates and clauses. The Broker Administrator also has the ability to generate reports on users, view user transactions and reassign them to other users.

Office Administrators – In large brokerages, it may not be practical to have only one administrator managing the account, so the brokerage account can be subdivided into offices (or locations). Each office location will has its own Office Administrator who has the ability to manage users, templates and clauses within their office. Each office may have multiple Office Administrators; also one Office Administrator may manage more than one office. Office Administrators only have the ability to manage users and templates that are in the offices to which they are assigned. Only the Broker Administrator has the capability to manage all users, templates and clauses within all offices.

Users – Users are not administrators, but they have some control over their own accounts and transactions. Users cannot view or make changes to any other user account.

Adding Users

To add users to your ZipForm®*Online* account you must have available seats. You may purchase additional seats if necessary by contacting your ZipForm Sales Representative. See the Product Support information at the end of this document.

From the Agent List page, add users by clicking on the Add Agent button.

General Information. On the Add Agent page you will be able to fill in information about the user: role, first name, last name, email address, phone, extension and fax.

The role is important because its sets the user's rights.

- A Broker Administrator may
    - Create, edit or delete locations;
    - Create, edit or delete users in any location, move agents in and out of office locations and reassign libraries;
    - Assign the role of Office Administrators for any location;
    - Assign the role of Broker Administrator for additional users.
- A Location, or Office Administrator may create, edit or delete users in their own location. An Office Administrator may not create other administrators of either type, or edit location information (such as the address).
- Agents, or users, may change their own information, but not location information (such as the address).

NOTE. At least one administrator must always be associated with an office. A user may be an administrator in multiple offices, and an office may have multiple administrators.

NOTE. An error may be displayed if you enter an email address that matches one that is already in use with another account.

Location Information. Select the office to which the user is assigned by putting a checkmark in the accompanying checkbox. Select additional locations if appropriate by checking them. The Corporate location will always be selected by default.

A Broker Administrator may assign one person to administrate more than one office. Please bear in mind that, when an Office Administrator is assigned to more than one office, the Office Administrator will have a view of all of the users in those offices assigned. So, if an Office Administrator is seeing a “wider” view of the roster than expected, the Broker Administrator should check and adjust the office assignments.

Library Information. Select one or more libraries from the set available. The ZipForm®*Online* Base Service will always be selected by default.

> *NOTE. It is important that one or more libraries be selected. Without a library selection, the user you are adding will not have any forms to use.*

“Invite” Email Message. Once the user has been added, the user will receive an email at the address that the administrator provided when creating the user account. The message will welcome the user to ZipForm®*Online* and provides him or her with information about how to set up the login password.

The Agent List Page

When you log into ZipForm®*Online* as an administrator, you are placed in the Agent List page by default.

However, you can access your Agent List page by clicking [Administration] and [Agent Manager] at the top of the page.

On the Agent List pages, an Office Administrator will see all agents who are associated only with the Corporate location, and all agents associated with their sales office location. A Broker Administrator will see all agents regardless of location.

All of your agents may not be visible on one page. If more than one page of agents is returned, an option is available at the bottom of the page to move to other pages. Click on the appropriate page number or select the [Next] option.

By design, only a limited number of pages will be returned. This speeds up the data retrieval process.

Finding Users

The recommended technique to find a user is to use the Find Agent filter. Using the Find feature is quick and easy. Agents may be found by their last name, email address, location or status. Most, if not all, agents will be “Active” status. Find a specific agent by filling in some criteria in one or more of the fields provided. You can use partial values in these fields. Click the Go button to find the matching locations. Use the Reset button to reset the filters to their default state.

Each page of users is displayed in alphabetical order. Each user is color-coded to match the role that each user fulfills. A Broker Administrator is shown in pink, an Office Administrator is shown in blue and all other users are shown in black. (See the legend at the bottom of the Agent List page.) Also, by clicking on column heading you can re-sort the list by that column heading.

Working with Agent Actions

On the Agent List page, you can choose an action to operate with a specified agent. On the right side of the page you see a Select Action drop-down list box next to each agent. Choose an agent to work with, open the list box at the right end of the line and choose an action. If you are an Office Administrator, your view of locations and libraries will be restricted. A Broker Administrator, on the other hand, has a view of all broker locations and the full library set.

- View. Opens the View Agent page. You can view the agent information including location, library information and role, but you cannot edit it. Click OK.
- *Edit*. Opens the Edit Agent page. You can edit any of the information you entered when the agent was created. You can select Click the Save button to make the change or click Cancel. Only the Broker Administrator is able to edit the address information of a sales office location.

- *Reset Password*. Discussed in detail below.
- *Delete*. Opens the Delete Agent page. Click the Delete button to remove the agent or click Cancel.

  <u>IMPORTANT</u>. Whenever you delete a user, please be aware that all transactions in the user's account are reassigned to the Broker Administrator. User transactions are not automatically deleted when the user account is removed. The Broker Administrator will find these transactions on their Transactions / Templates List page where the transactions can be deleted or reassigned to another user.

  A good rule to follow *before* you delete a user is to first inspect the user's account and take a look at the transactions (if any). Delete or reassign these transactions before you delete the user's account. (See the descriptions of ***Transactions*** and ***Reassigning Transactions*** below.)
- *Transactions*. This action is available to the Broker Administrator. For the agent selected, this action opens to the Transaction / Template List page where the agent's transactions may be opened and inspected. Notice the selected agent's email address above the Transaction / Template List header and the [cancel] link. ***Be sure to click the [cancel] link when you are finished using the Transactions action***. If, after clicking [cancel], you remain in the Transaction / Template List context, click the [Administration] link at the top of the page to return to the [Administration] context.

Reassigning Transactions

When it becomes necessary, one of the important capabilities of the administrator is to reassign transactions.

For example, when an agent is removed (deleted) from ZipForm®*Online,* all of the agent's transactions are automatically reassigned to the Broker Administrator. Other reasons to reassign transactions may be an agent on leave or disability, or maybe a transaction or referral coordinator will take over the process.

While logged in as the Broker Administrator, the process to reassign a transaction is as follows.

- Move to the Agent List page by selecting [Administration] and [Agent Manager].
- Find and select the agent with whose transactions you want to work.
- Open the Select Action drop-down list box and select the *Transactions* action. This will place you in the context of the agent's Transaction / Template List page.
- Find and select the transaction you want to reassign.
- Open the Select Action drop-down list box and select the *Reassign* action. This will open the Reassign page.
- Open the Member drop-down list box and choose the name of the agent to whom you wish to reassign the transaction. Click the Reassign button.
- Reassign other transactions for this agent as desired.
- Finally, notice the selected agent's email address above the Transaction / Template List header and the [cancel] link. Be sure to click [cancel] when you are finished using the *Transactions* action.

Moving Agents Between Offices

It is possible to move users from one location to another.

When a Broker Administrator logs in, the Agent List is the default view where they can see all of the users in the brokerage and all of the locations. The Agent List is also the default view of an Office Administrator.

However, an Office Administrator can see users assigned solely to the Corporate location *in addition to* users assigned to the location. There is a reason for this, and it has to do with moving users between locations.

To move a user *out* of an office location:

- First, find the user in the Agent List. Choose the Edit action.
- As an Office Administrator
  - o You will notice that the user is assigned to the Corporate location and an office location. Uncheck the office location leaving the user assigned to the Corporate location. (You will not be able to uncheck the Corporate location.)
  - o The user is now moved out of the office location that was unchecked. Now, all Office Administrators (along with the Broker Administrator) will be able to see this user.

To move a user *into* an office location:

- First, find the user in the Agent List. Remember, you can see the users in your office and also all of the users in the Corporate location. Choose the Edit action.
- As an Office Administrator
  - o You will notice that the user is assigned to the Corporate location. Find the office location to which you want to assign the user and check it.
  - o The user is now moved into the office location that was checked. Now, only the Broker Administrator and the Office Administrator of the location checked will be able to see this user.

This sequence is easier for a Broker Administrator because everything can be seen at once. The Broker Administrator can edit the user, uncheck one location and immediately check another.

Managing Passwords

In addition to the "invite" email message received by a newly set-up user, there are other ways to manage passwords. The Set Password and Reset Password actions are found in the [Administration] -> [Agent Manager]

Reset Password Action. Administrators see the Reset Password action.

When an administrator chooses Reset Password, the following this happen:

- The user receives an email at the address on the user account. The message will say that the next time the user logs into ZipForm®*Online* he or she will see the Change Password page.
- On the Change Password page, the user will enter a new password and confirm it in a second field.
- When this is complete, the user is placed back in the Transaction / Template List page.
- After the password has been reset the user receives a confirmation email that says that the password on the account has been reset.

Set Password Action. Agents see the Set Password action instead of Reset Password.

When the user chooses Set Password, the Password Change page is presented immediately. The user immediately enters a new password and confirms it in a second field. The user clicks Save (or Cancel). When this is complete, the user is placed back in the Transaction / Template List page. There are no email messages associated with Set Password.

Forgot Your Password Link. All users, regardless of role, have access to this link on the Login page. This process can be used by any user to change their password and is similar to the Reset Password process.

When a user follows the Forgot Your Password link:

- The user enters the email address on the user account that needs the password change.
- The email account receives a message that provides a link to follow where they can set the login password.
- The user follows link in the email message to the ZipForm®*Online* Change Password page.
- On the Change Password page, the user will enter a new password and confirm it in a second field. When this is complete, the user is placed back in the Transaction / Template List page.

Templates

Templates may be created at the global, office or agent level.

Template management is combined with transaction management in the Transaction / Template List because templates are very much the same as transactions, so the system is much more efficient by handling them both on one page. The only difference, essentially, is a change in Transaction / Template status. The three template statuses are:

- *Global Template*. Only a Broker Administrator can see this status because only a Broker Administrator can create this level of template.
- *Location/Office Template*. An Office Administrator or Broker Administrator can create this level of template.
- *Agent Template*. All users (including administrators) may create and use their own templates at this level.

Managing Templates

There are two ways to add a template.

- *Save As*. Choose an existing transaction. Click on the Select Actions drop-down menu choose the Save As action. Name the template. Open the Transaction / Template list and choose the appropriate one of the Transaction / Template statuses listed above. Click the Copy button. Use the Find Templates procedure to find the template and the Open action to edit the template forms and data.
- *Add Transaction*. Click the Add (Create) button. Name the template. Open the Transaction / Template list and choose one of the Transaction / Template statuses listed above. Click the Add button. The template will open in the Form Viewer where you can add forms and data.

Clauses - Clause Manager

By using the [Clause Manager] link, an administrator may create and store “Location” or “Global” clauses. Agents cannot create or edit clauses at these levels but they can apply them. Location (or “office”) clauses are available only to users assigned to a specific location. “Global” (or “broker”) clauses, on the other hand, are available to all users in the organization.

Managing Clauses

When the [Clause Manager] is accessed, the Clause Manager page is displayed. Manage clauses using the following general procedure. Clauses are applied to transaction forms within the Form Viewer.

Level Information. Choose the level you want to work with.

- *Global*. An Office Administrator and Broker Administrator can both create global clauses.
- *Location*. When using the Location level, you must choose a Location. An Office Administrator can choose the Corporate location and the location with which they are associated. A Broker Administrator can choose from all locations.
- *Agent*. All users (including administrators) may create and use their own clauses at the Agent level. Only the individual agent can access and use Agent clauses.

Clause Information.

- *Category*. From the drop-down list box, select Add New to create a new category, or select an existing category. If you are creating a new category use the field below the Category drop-down list box field to name the new category.
- *Title*. An Add New selection will always be shown in the Title box. If you just created a new category, you will be adding a new clause to it. Give the clause a name in the field below the Title box. If you chose an existing category, any clauses that already exist in the category will show up in the Title box. You may add a new clause by selecting Add New or you may select an existing clause title.
- *Clause*. Enter the clause text in this box. The text in this box is fully editable. Click Save or Cancel. Use the Delete button to remove clauses or categories.

Reports

There are reporting tools available for Broker Administrators. Currently the reports that are available are, Seat Information, Total Transaction Counts, User/Transaction Counts by Office and Transaction Counts by User. Additional reports will appear as they are made available. To access reports, click on the [Administration] link anywhere within ZipForm®*Online* and select [Reports]

Product Support Information

Product support is available from our HelpDesk only to registered ZipForm®*Online* users between the hours of 8:00 a.m. and 8:00 p.m. Eastern Time Monday through Friday.

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