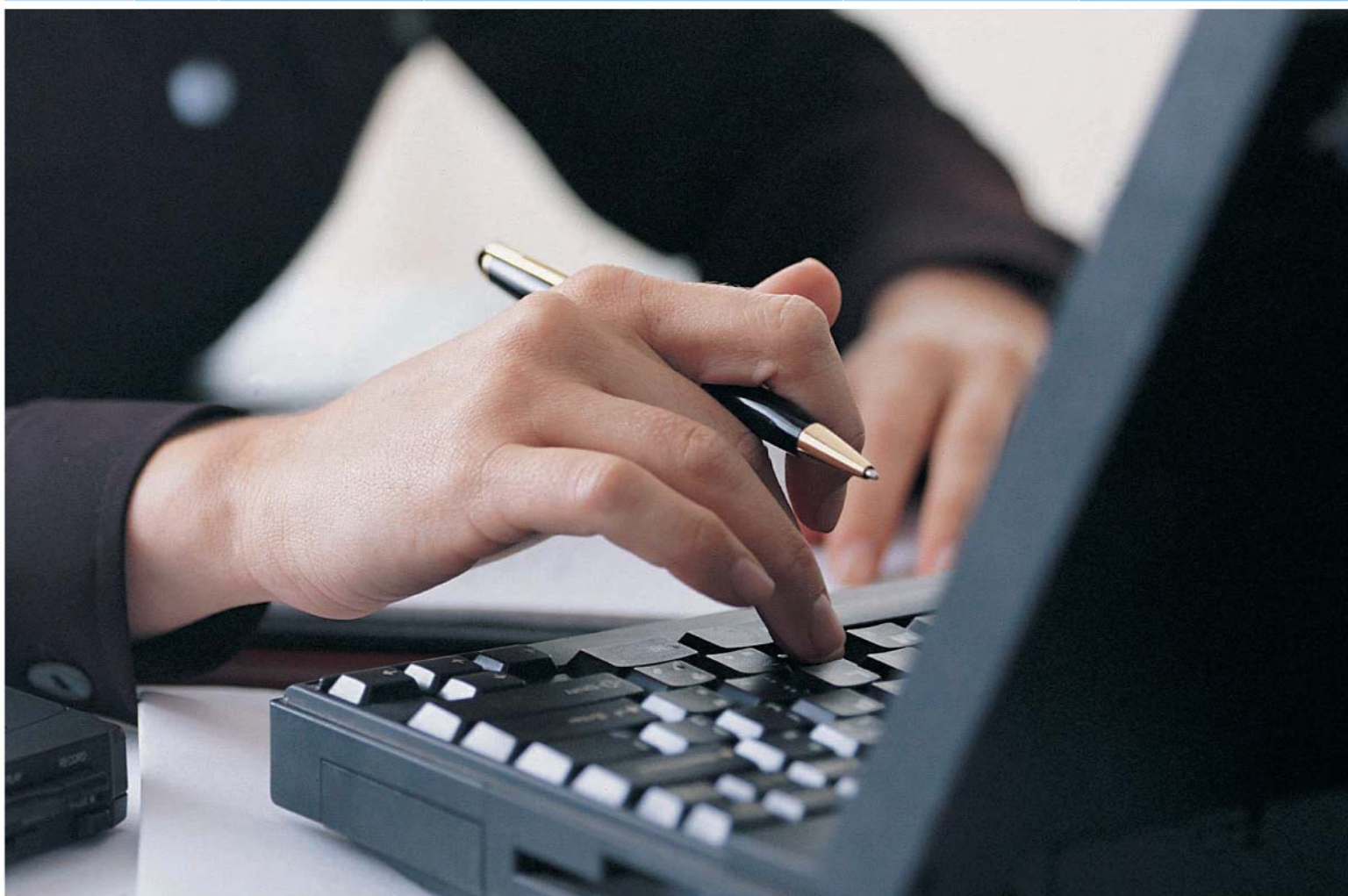




ZipForm Online

OFFICIAL FORMS SOFTWARE OF THE NATIONAL ASSOCIATION OF REALTORS®



User Guide

Getting Started with ZipForm®Online

Your First ZipForm®Online Login

SINGLE USERS

When you sign up for ZipForm®Online you will be required to provide your email address and create a password of your choosing. With that complete, open your web browser and go to www.zipformonline.com. You may log into the site using your email address and the password you provided when you signed up.

When you have successfully logged into ZipForm®Online for the first time, you will be prompted to download and install the Form Viewer.

OFFICE USERS

Your ZipForm®Online administrator may complete the initial set up for you to use ZipForm®Online. If this is the case, you will receive an email entitled "Your ZipForm®Online Account." Click on the link at the bottom of the email message. Your web browser will open a page for you where you can set your password. After you create your password you can point your browser to www.zipformonline.com. Your username would be your email address and your password would be the one that you just set up. When you have successfully logged into ZipForm®Online for the first time, you will be prompted to download and install the Form Viewer.

PORTAL USERS

In some cases you may sign up to use ZipForm®Online from inside a "members only" area of your Association or Broker website. In this case, you may be required to complete the ZipForm®Online signup as a single user would. You will probably log in and use ZipForm®Online from your "members only" area. Typically you would log into your website, click on a provided ZipForm®Online link, and be placed directly into your Transaction / Template List (described below). When you have successfully logged into ZipForm®Online for the first time, you will be prompted to download and install the ZipForm®Online Form Viewer.

Your ZipForm®Online administrator may create a CD and make it available to you so that you may pre-install the ZipForm®Online Form Viewer. This can be useful because it allows you to skip the time involved to do the file download. You may also find a CD useful to occasionally load the Form Viewer onto a clients PC.

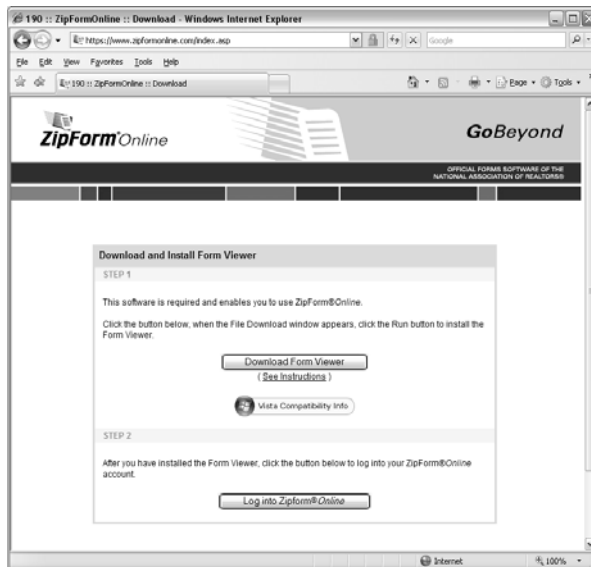


Figure 1 - ZipForm®Online Form Viewer Download Page

Installing the ZipForm®Online Form Viewer

To use ZipForm®Online you will be required to download and install the ZipForm®Online Form Viewer. Until the Form Viewer is installed, whenever you log into ZipForm®Online, you will be presented with the web page in (figure 1).

When you download the file, you will be prompted to "Run" or "Save" the file. Either choice will work.

Run: Once the file has been downloaded, the installation script will automatically run.

Save: If you want to download the file now and install it later, select "Save." Choose the location that you wish to save the file (such as the Desktop). Later, when you are ready to install the Form Viewer, double-click on the install file.

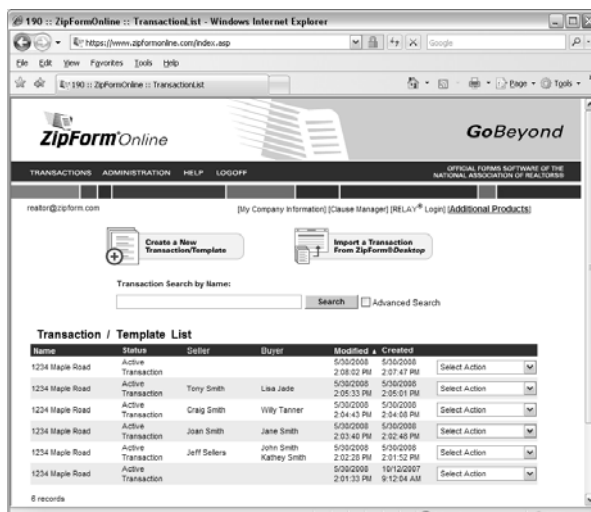


Figure 2 - Create a New Transaction/Template Button

Add Transaction / Template

General Information * Required Fields

* Transaction Name:

* Transaction / Template:

* Transaction Type:

* Property Type:

Template:

Import:

Figure 3 - Add Transaction / Template Page

Creating a New Transaction

1. Navigate to www.zipformonline.com in your web browser and log in with your email address and password.
2. Click the **Create a New Transaction / Template** button (figure 2) on the Transaction / Template List page.
3. Assign a name to the transaction (figure 3). Common names you might use could be the name of the Seller, the Property address, or another identifier that you choose. You can choose the Transaction Type and Property Type by using the pull-down menus.

There is an option for using a Template to start or "seed" a transaction (page 7). If you want to use a Template that you have already created, choose it from the Template pull-down menu. Click the **Add** button to continue. The Form Viewer will open automatically.

4. With the Form Viewer open, choose a form to start your transaction. If you have multiple libraries available to you, you will be able to select one of them via a pull-down menu. You must select at least one form.

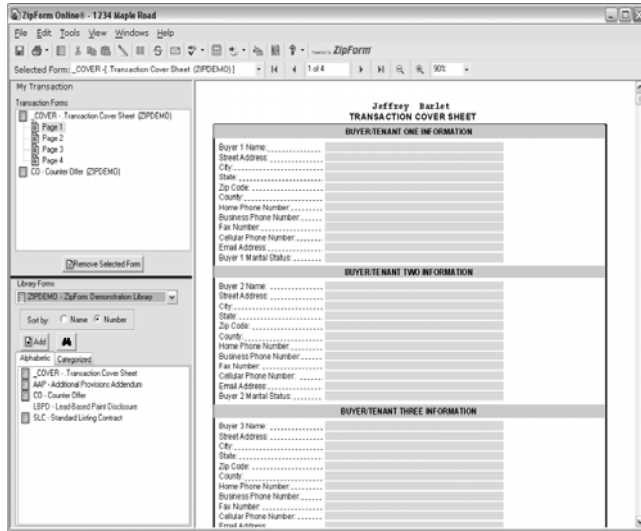



Figure 4 - Form Manager Pane

- With the Form Manager pane open (figure 4), you will see the forms in your transaction listed in the Transaction Forms pane. Forms that are available to be added to the transaction are listed in the Library Forms pane (below the Transaction Forms pane). If you have multiple libraries available to you, you will be able to select one of them in the Library Forms pane via a pull-down menu. Double-click a form in the Library Forms pane to add it to your transaction.

Forms that show up in the Library Forms pane will be either black or blue in color. Forms that are black have been downloaded and stored locally on your computer. This happens automatically as you select forms for your transaction.

Forms that are blue have not been downloaded yet; double-clicking on a blue form will cause that form to be downloaded

and added to your transaction. Once the form has been downloaded once it will turn black in the Library Forms pane. The reason for storing forms locally is so that you don't have to keep downloading the same form over and over. Whenever an updated version of the form becomes available, however, the form color will change to blue again. When you double-click on it the form will be downloaded again in its new version.

- When you are finished adding forms and information to your transaction, click the Save icon () to save the transaction.

Cover Sheet Form

It is recommended that you always include your Association or Broker Cover Sheet as one of the forms in your transaction. The Cover Sheet is a special "data collection" form. Information (data) entered on the Cover Sheet will flow to the other forms in the transaction. Completely filling out the Cover Sheet will fill in much of information on other forms in your transaction. It also provides a single place to look at basic information you've entered into the transaction. The Cover Sheet allows you to enter information about the Buyer(s), Seller(s), Property Information, Selling Broker, Listing Broker and much more.

Navigating and Entering Information in the Form Viewer

In the Form Viewer, you can move between fields on the active form page by either clicking into a data field with your mouse or by using the tab key to move from one field to the next.

Only the active page is editable. You can easily navigate between forms and pages in two ways.



Figure 5 - Navigation Toolbar

1. Use the Navigation toolbar features (*figure 5*). Choose the form in your transaction that you want to work with by selecting from the Selected Form pull-down menu. Use the arrow buttons in the header bar to move forward or backward to different pages in the form.

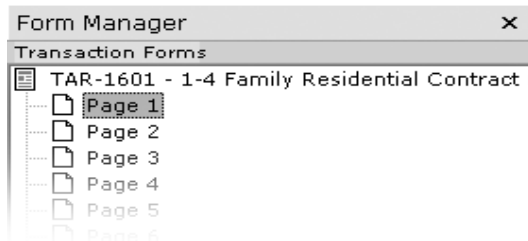


Figure 6 - Transaction Forms Pane

2. You can also click on the form and page icons in the Transaction Forms pane (*figure 6*) to move between forms and pages. Notice that some form fields include a pull-down menu. A city name field would be an example. Any information that you enter in such a field will be stored in a list and can be accessed from other similar fields so that you don't have to retype identical information.

To use information in a list to fill the field, select the drop-down list with your mouse and click on your choice, or use the cursor keys on your keyboard to move through the list and press the Enter key to select your choice.

You can edit these lists. Look on the File menu for Lookup Fields.

Another type of field that uses a pull-down menu is a date field. Clicking the pull-down menu in a date field pops up a calendar. You may move around the calendar by days or by months. By clicking on a date and clicking OK you have now placed that date in your field.

NOTE: If you want to override the default formatting in a field, place the cursor in the field and hit the space bar. The field will turn green which tells you that it is set to accept free-form text. This is effective for date, dollar and percentage fields.

As you move between forms, you will notice that information from your Cover Sheet auto-populates into appropriate fields on other forms. If there is information on the Cover Sheet that does not show up in a field where you expect it, click on that field and see if there is a pull-down list. If there is, open it and you should see the information you want in the list. Simply highlight your selection in the list and it will come forward onto the form field.

Saving Transactions

Any time information is entered or changed, you'll have a chance to save it before closing the transaction. When you choose File -> Close, ZipForm®Online opens a dialog box prompting you to save. You can also save the transaction by clicking the Save icon in the header bar, or File -> Save from the menu bar.

Opening an Existing Transaction

Any existing transactions may be opened from the Transaction / Template List page. To open a transaction, click on the Select Actions dropdown menu (*figure 7*) to the right of the transaction line and choose the Open action. The Form Viewer will open the desired transaction.

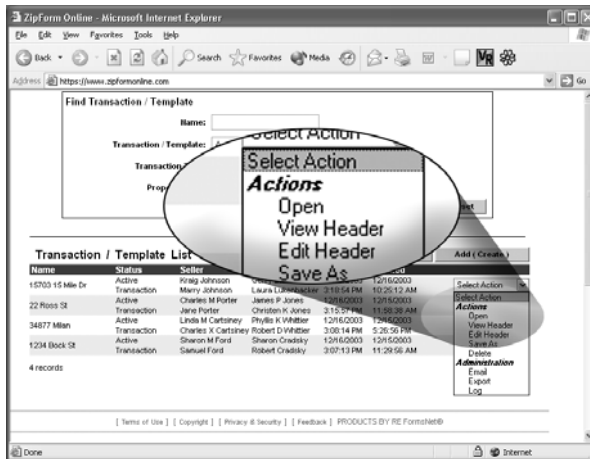


Figure 7 - Select Actions Drop-Down Menu

Transaction / Template Page Features

An important one-click, time-saving feature allows you to filter your working list between agent templates and active transactions. Simply click on the appropriate word in the Transaction / Template List header. There are also a number of actions you can perform with transactions and templates. Notice the Select Actions field at the right side of each transaction or template.

The available actions are:

Open – Allows you to open a transaction or template in the Form Viewer so you can work with the forms and data.

Email – Allows you to email the transaction (in ZipForm Transaction format) or separate PDF documents.

Edit Header – Displays transaction header information and allows you to edit the transaction name and its attributes (e.g. type and status).

Save As – Allows you to save a copy of a transaction or template to another name.

Export – Moves transaction to local storage where it can be opened with ZipForm®Desktop.


View Header – Displays transaction header information (similar to Edit Header action except that the information is not editable.)

Reassign – Allows an administrator to assign a transaction to another user. Normal users do not see this action.

Delete – Allows you to delete a transaction.

Program Features

Strike-Outs

Another feature built into ZipForm®Online is the Strike-out. Click on the toolbar icon () to access the strike-out feature. Position the cursor at one end of the text you want to strike-out, hold the left mouse button down and drag the cursor across the text. You'll notice that the text being struck-out is highlighted black. Click away from the struck-out text to see the strike-out in place.

With the strike-out feature active, you can remove a strike-out by double-clicking on any part of the lined-out text. The strike-out feature will remain active until you click on the strike-out icon again or begin typing information into a field.

Templates

A powerful feature, the template is a special kind of transaction that can be used to start (or “seed”) another one. Templates usually contain forms and information that don't change from transaction to transaction like your name, phone numbers and office address. Templates can save time and assure accuracy when you know you are going to be using the same basic transaction repeatedly. They are also useful for assembling packages of forms such as “listing” or “sales” packages. 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.

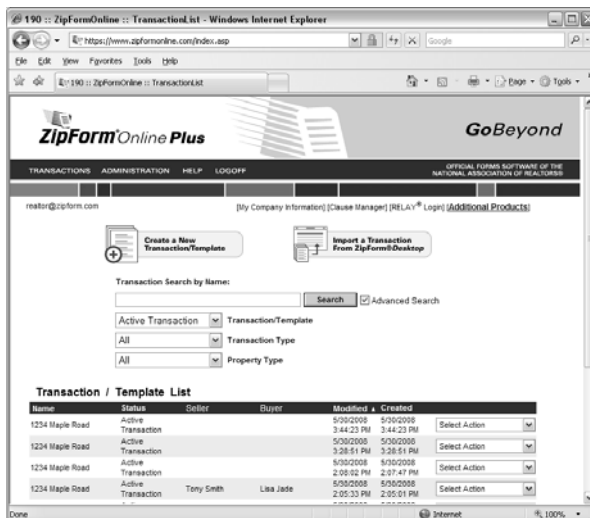


Figure 8 - Find Transaction / Template Window

Find Template. The easiest way to get a list of Agent Templates is to click on the word “Template” in the Transaction / Template List header. Your list will be filtered to show only “agent templates”. (You can also click on the word “Transaction” in the Transaction / Template List header to filter out a list of active transactions.)

As an alternative, you can use the Transaction Search by Name box (*figure 8*) of the Transaction / Template List page and open the Transaction / Template drop-down list. You will first need to place a check mark in the Advanced Search checkbox to search for anything other than Transactions. Choose Agent Template and click the Find button. Your list will be filtered to show only “agent templates”.




(If you have not created any agent templates, this list will be empty.) Also, whenever the Transaction / Template List page is first displayed, it lists Active Transactions by default.

Add a Template. There are two ways to add a template.

1. **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 "Agent Template." Click the Copy button. Use the Find Templates procedure to find the template and the Open action to edit the template forms and data.
2. **Add Transaction.** Click the Add (Create) Transaction button. Name the template. Open the Transaction / Template list and choose "Agent Template." Click the Add button. The template will open in the Form Viewer where you can add forms and data.

Figure 9 - Clause Manager


Editing Tools

ZipForm®Online includes standard Windows Cut, Copy and Paste tools. (  )


Clause Manager

Notice the [Clause Manager] link on the Transaction / Template List page. The Clause Manager (*figure 9*) allows you to compose, catalog and store an unlimited number of clauses. Create and store a clause when you have specific text that you want to use over and over. Clauses are effective when lengthy or complex text is used occasionally or using a template is unwarranted. When a clause is always required in a specific case or used on a frequent basis, consider using a Template. You may create, edit or delete your own clauses. In addition, an administrator may create and store "Location" or "Global" clauses. If these "higher" level clauses are available for you to use, you can use them but you will not be able to edit or delete them.


Figure 10 - Clause Editor

Location (or "office") clauses are available to users assigned to a specific location while "global" (or "broker") clauses are available to all users in the organization. In the Form Viewer, clauses may be recalled and pasted into a field, saving you from having to type the clause repeatedly. To use a clause that you have already created, click on the field of the form which you want to add the clause to and open the **Clause Editor** () (*figure 10*). Find the appropriate clause and click on the Use Clause button. The clause will be pasted into the active field.


Printing

You can print the current form from the Toolbar. Use the Print icon button () in the Toolbar to print the active form on your default Printer. You may also print all of the forms in the transaction by clicking on the arrow to the right of the print icon and selecting **Print All Forms**.


Mortgage Calculator

A simple mortgage calculator is provided that can help with loan payments and amortizations. Use the Mortgage Calculator icon button () in the Toolbar.


Sticky Notes

Sticky notes are handy because you can exchange information and draw attention to specific form areas with them. You can place a note wherever you want on the active page and add what ever text you want. Place as many notes as you want in the transaction. Use the Sticky Note icon button () in the Toolbar. NOTE: sticky notes will not show up if you save or email in PDF format.

Spell Check

Use the Spell Check feature to check the spelling of information you have added to a transaction. NOTE: The form text itself is not checked. Use the Spell Check icon button () in the Toolbar.

Dialog View

Any active page that has fields on it can be reduced to its “dialog” view. The dialog view of a page shows only the data fields and labels without the form text. This can be a handy way to concentrate on the fields of a page for rapid data entry. Use the Dialog View icon button () in the Toolbar

Emailing Transactions

ZipForm®Online takes advantage of web-based email so there are no configuration issues or email programs to install. Documents may be emailed in a ZipForm Transaction format or an Adobe PDF format.

Adobe PDF is the most common format used to share electronic documents. PDF files are smaller in size, yet maintain all of the content and formatting of the original document. PDF files created by ZipForm®Online are locked and cannot be edited or changed once they are created. Further, a PDF document may not be re-imported into the ZipForm®Online or ZipForm®Desktop programs. If you want to email and share the transaction with someone who will use ZipForm®Online to edit the information, send the transaction in ZipForm Transaction format.

To email a transaction from the Transaction / Template List page:

1. Select the transaction that you want to email and choose the Email action.
2. Type in the To: and Cc: addresses in the field provided. You may type Additional Comments if you wish. These will precede the instructions about how to download the appropriate viewer (ZipForm Transaction viewer or PDF Reader).
3. You may want to send the forms in PDF. PDF documents by their very nature are already locked and do not require a password, so leave the password fields blank.

If you want to share the transaction with another ZipForm user so that they may import it and use it, send the transaction in ZipForm Transaction format. The document will be sent "locked." You may enter a password to further secure the document. (You do not have to enter a password.) A locked transaction may not be edited in ZipForm®Online or ZipForm®Desktop until it is unlocked with the proper password. Use a password that you will remember.

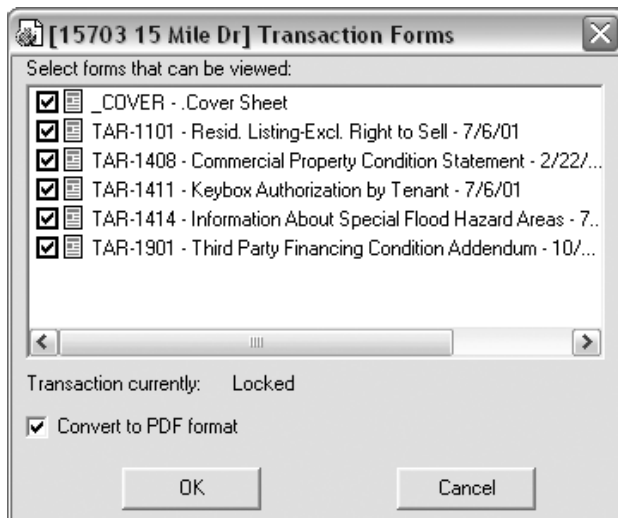



Figure 11 - Email Transaction Dialog

4. Click the Email button. A dialog box appears (*figure 11*) that lists all the forms in the transaction.
5. If you want to send the attachment as a ZipForm Transaction, make sure you **uncheck** the Convert to PDF box. Use this window to choose which forms will be visible to the recipient (since all of the forms are included in the emailed transaction). If you click on the check box next to a form and remove the checkmark, the form will not be viewable by the recipient.

If you are sending PDF documents, make sure the Convert to PDF box is **checked**. (NOTE. This box is checked by default.) Use this window to check the forms you want to send and uncheck those you don't want to send.


6. Click the OK button to complete the process.

To email a transaction from inside the Form Viewer:

At any time you can also prepare email from inside the Form Viewer. Choose File -> Email or click the Email icon ().

Electronic Signatures

Collecting an electronic signature is a simple process. The only technical requirements are a valid email address and an internet connection. You must be connected to the internet in order to send files to be signed electronically, and you are required to register an Esign account and create a personal electronic signature. Once a user account has been established, a small client software program must be downloaded and installed to begin collecting electronic signatures.

Forms are collected and sent for signatures in “electronic envelopes.” To begin the process of collecting electronic signatures, select Electronic Signatures from the File menu or click on the electronic signatures icon () in the toolbar.

Select the documents you want to send by clicking on the checkbox to the left of the form name. Click OK. The Add Documents page shows you the current documents in your envelope. You may continue adding additional documents by simply opening the desired documents and repeating the File -> Electronic Signature process. Click the “Update List” button to refresh the contents list.

Mark areas that require a signature or initial by clicking on a listed eTab from the toolbar, and dragging it anywhere in a document within the envelope. When your forms are ready to be sent, address the envelope by entering the signers’ email address and setting the authentication requirements.

You can check the status of documents you have sent for signatures by accessing the ZipForm®Esign console.

Other Helpful Tips

Form Updates

One of the many advantages of ZipForm®Online is that you don’t need to worry about updating your forms when a new version of the forms becomes available. When updated forms are made available, a new library index will appear in the Form Viewer Library Forms pane. The form names in the index will appear blue. Double-clicking on a form downloads it from the server, automatically adds it to the open transaction and stores it on your computer so it doesn’t have to be re-downloaded.

You may choose to download all of the library forms at once by clicking the icon to the right of the Library Forms drop-down list. The amount of time required to download all of the forms will depend on the number of forms in the library and your available bandwidth (Internet connection speed).

Exporting a Transaction to ZipForm®Desktop

If you want to access transactions when you are not connected to the Internet *and* you have ZipForm®Desktop available, you can store ZipForm®Online transactions on your hard drive or network. You must have a functioning installation of ZipForm®Desktop to edit locally stored

transactions. You may purchase a copy of ZipForm®*Desktop* by visiting our website or by contacting our HelpDesk .

You can export (download) a transaction to your local computer from the Transaction / Template List page. Choose the transaction that you want to export. Click on the Select Actions drop-down menu choose the Export action.

You will be prompted to choose a location to store the transaction. If you are unsure, choose the Desktop. You can move it elsewhere later.

Importing a Transaction from ZipForm®Desktop

If you have ZipForm®*Desktop* transactions stored on your local computer, you may import (upload) them and work with them in ZipForm®*Online*. This could be the case if you use ZipForm®*Desktop* or if you previously exported a ZipForm®*Online* transaction to the desktop.

You can import a transaction from your local computer from the Transaction / Template List page by clicking on the Import a Transaction from ZipForm®*Desktop* button.

This action will launch the Add Transaction page as described above under Creating a New Transaction. Note that the Import checkbox has a checkmark in it. A dialog window lets you locate the transaction you want to import. (NOTE. This file will have a “.ZFX” extension.)

Locate the transaction on your hard drive and click OK. Once the import is complete, the Form Viewer will display the transaction. Save the transaction by follow the Saving Transactions instruction above.

Getting Help

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.

HelpDesk:

support.ziplogix.com
Fax Number :: 586-790-7582

Mailing Address:

zipLogix
18070 15 Mile Road
Fraser, MI 48026

Sales:

Phone Number :: 866-693-6767
Email :: sales@zipform.com
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www.ziplogix.com



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