

**relay® Advanced Training**

Using relay® for marketing,  
communications and office  
management

[www.ziplogix.com/relay](http://www.ziplogix.com/relay)  
[support.ziplogix.com](http://support.ziplogix.com)

relay®

Notes:

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**Putting your files to work**

Save time while impressing your  
clients with relay®

## Going Beyond the Transaction File

### The basics of creating a file in relay®:

1. Start a New Transaction
2. Add Documents
3. Create a Checklist of Activities
4. Update the Notes (communication log)
5. Invite your buyer or seller

### This file can also be used to:

1. Work with Service Providers
2. Market a listing
3. Create a marketing CD or archive the file

Notes:

## Setting Up relay® to Work for You

### Time-saving tools

- Checklist Templates to set up files with
  - Activities
  - Documents
  - Contacts
- relay® Contacts (your address book for all transactions)
  - Import contacts from Top Producer or Outlook
  - Use contacts in relay® and in zipForm® 6

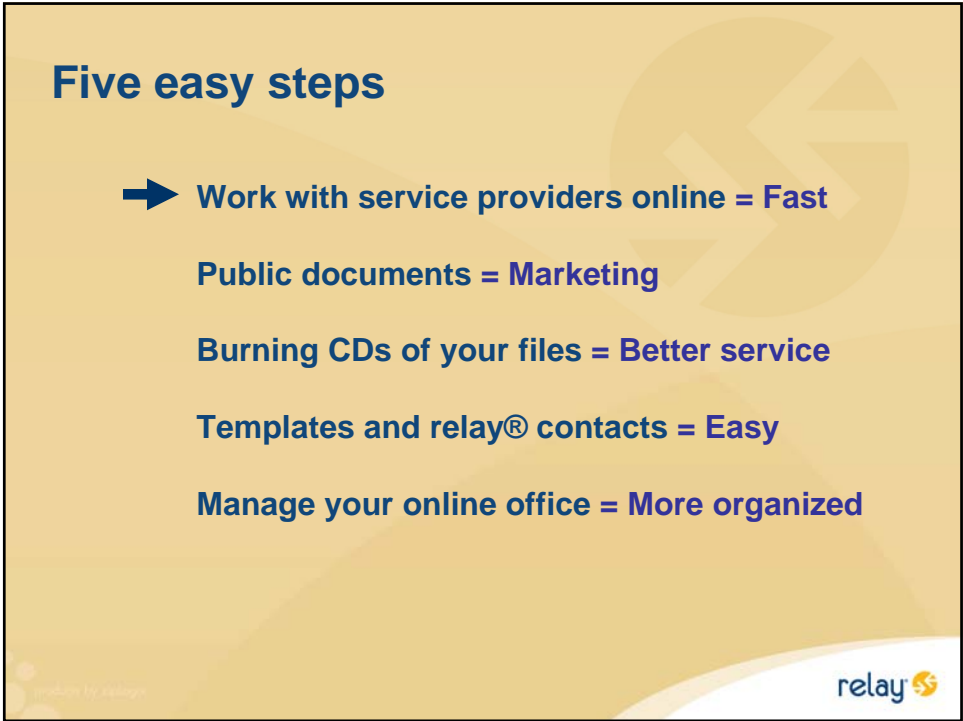
### Office Organization

- Site Manager for brokerage branding and information
- User Manager to add Agents, Assistants, Transaction Coordinators

## Five easy steps

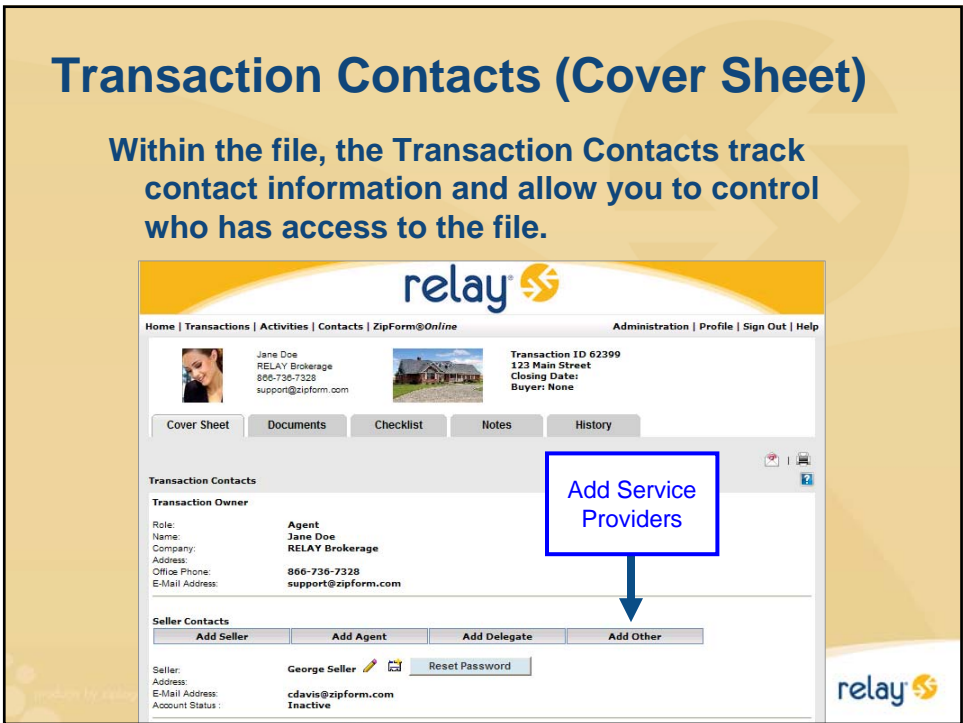
- ➔ Work with service providers online = Fast
- Public documents = Marketing
- Burning CDs of your files = Better service
- Templates and relay® contacts = Easy
- Manage your online office = More organized

Notes:



## Transaction Contacts (Cover Sheet)

Within the file, the Transaction Contacts track contact information and allow you to control who has access to the file.



## Share Documents with Anyone

The screenshot shows the 'Provider Workspace Detail' page in the relay® system. It includes fields for 'Workspace Name' (Transaction Documents), 'Description', and 'Instructions to Provider(s)'. There is a table for 'Service Providers' with columns for First Name, Last Name, Company Name, Type, and a 'Re-send invitation' button. At the bottom, there is a table for 'Documents for Provider Workspace' with columns for Document, Status, Date, Activity, By, Group, Comments, and Provider. Three blue callout boxes with arrows point to specific features: 'Workspace Information' points to the workspace name and description fields; 'Invite Service Providers' points to the 'Add' button in the service providers table; and 'Make Documents Available' points to the 'Public Documents' tab and the 'With selected...' dropdown in the documents table.

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## Public Documents

relay® Created by zipLogix

Jane Doe  
relay Training Brokerage  
866-736-7328  
odavis@ziplogix.com

Transaction ID 100955  
123 Main Street, City, ST

Documents About relay®

English | Spanish | Chinese | Vietnamese

First Name \*  
Last Name \*  
E-Mail Address  
Phone Number

Welcome to my website for 123 Main Street!

By proceeding, you agree with the [Terms of Use and Privacy Policy](#) of this site.

I Agree

Anyone you invite can "Sign In" to this website

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## Five easy steps

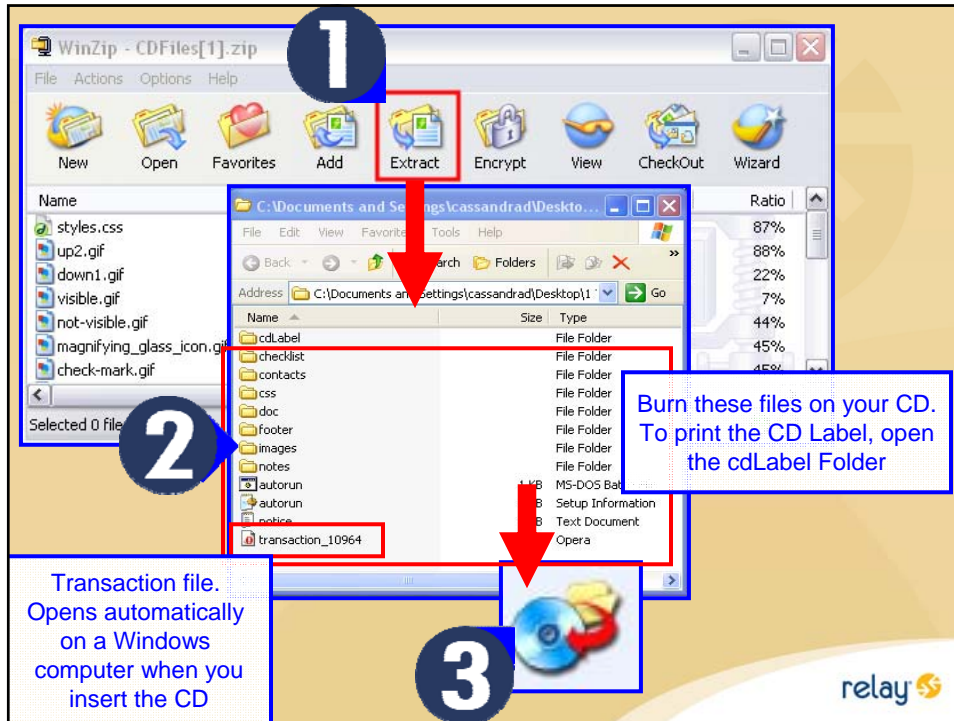
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Public documents = **Marketing**

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Work with service providers online = Fast

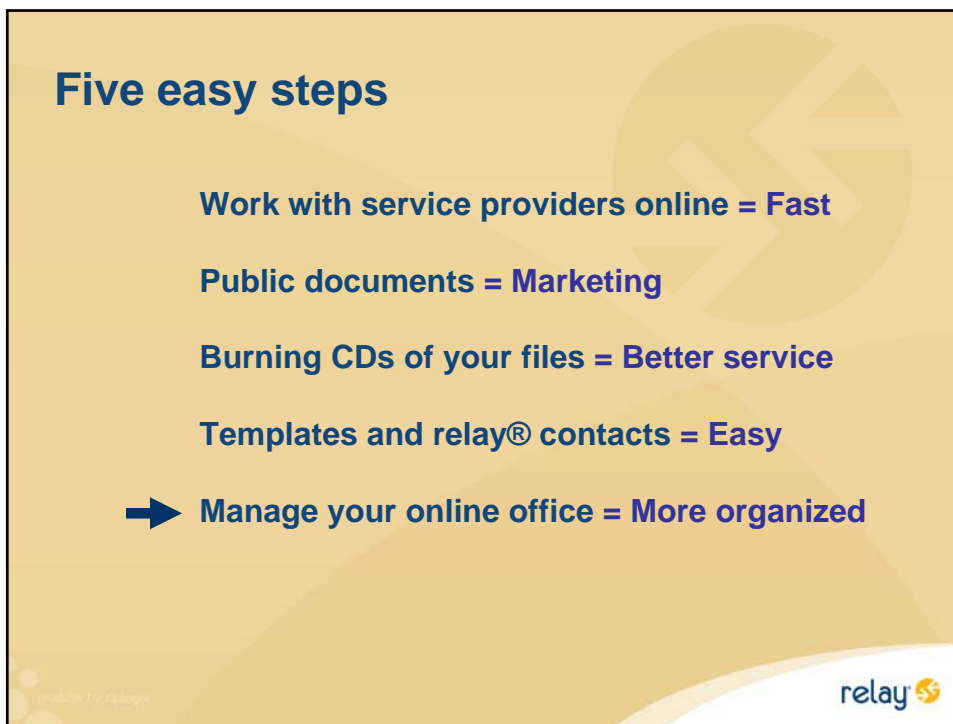
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## Site Administration

Site administration lets you control:

- How your online office looks
- Who has access to your online office
- Checklists and contacts in your online office



## Five easy steps

Work with service providers online = **Fast**

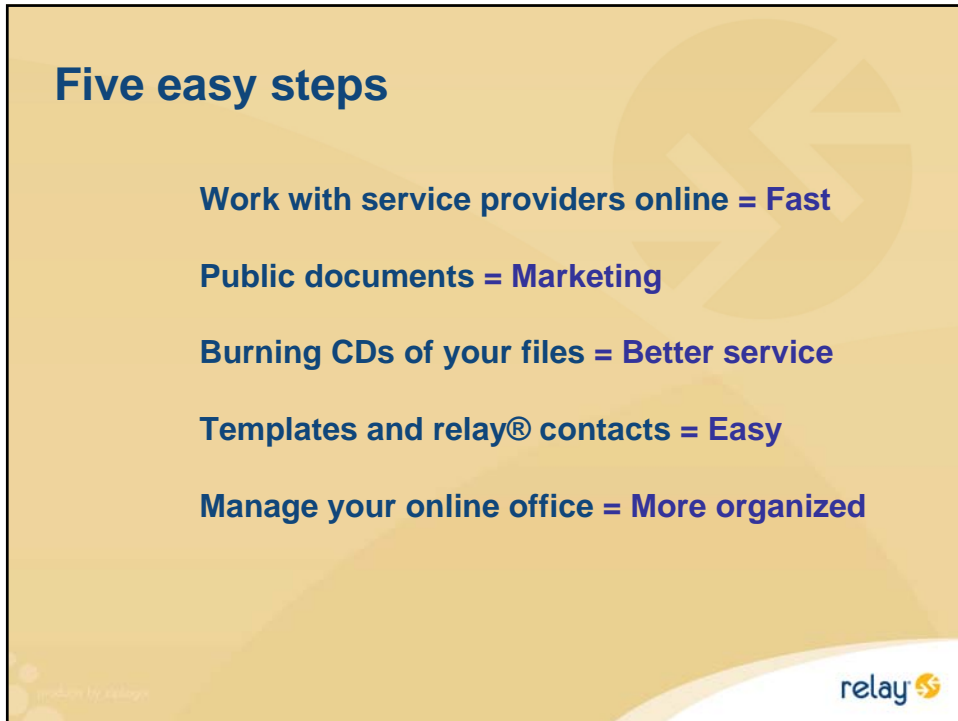
Public documents = **Marketing**

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Templates and relay® contacts = **Easy**

Manage your online office = **More organized**

Notes:

A slide with a light orange background and a large, faint relay logo in the background. The text is centered and lists five benefits of the relay service. The relay logo is in the bottom right corner.

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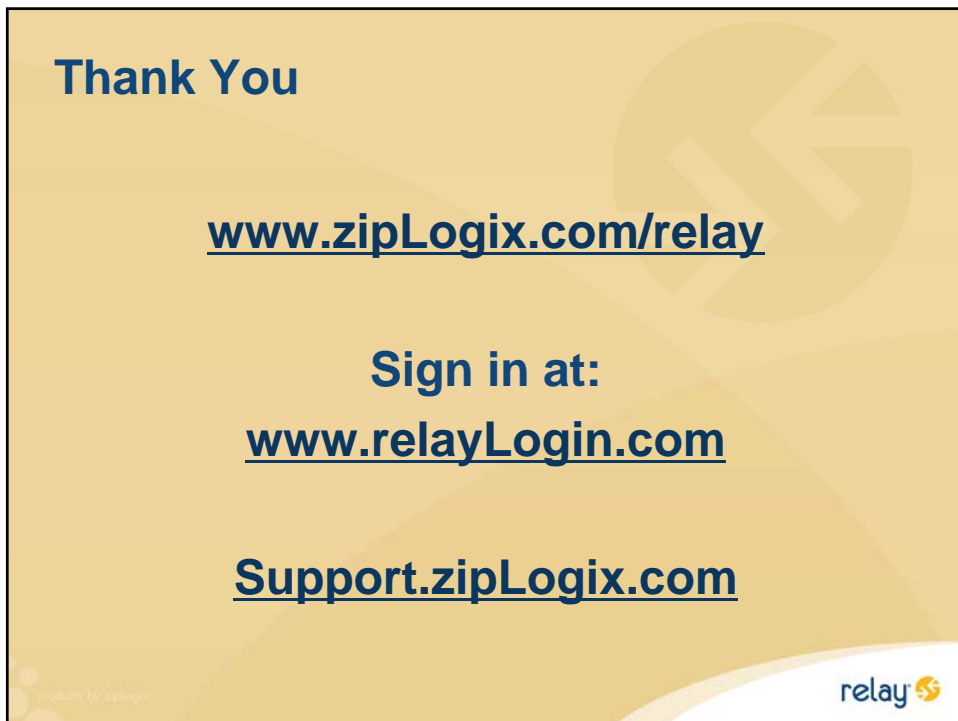
## Thank You

[www.zipLogix.com/relay](http://www.zipLogix.com/relay)

Sign in at:

[www.relayLogin.com](http://www.relayLogin.com)

[Support.zipLogix.com](http://Support.zipLogix.com)

A slide with a light orange background and a large, faint relay logo in the background. The text is centered and provides thank you information and links. The relay logo is in the bottom right corner.

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