

zipForm® 6 Training

Filling out forms electronically

Training Time : 60 Minutes
Trainer: Cassandra Davis



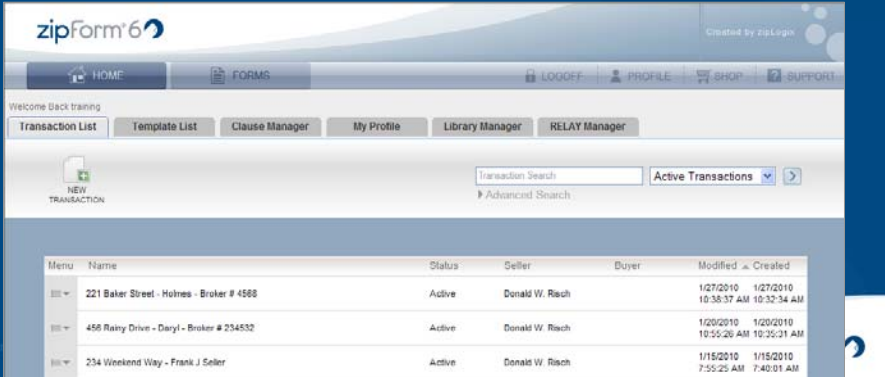
www.ziplogix.com/zf6
support.ziplogix.com

zipForm 6 

Notes:

Why work on zipForm® 6?

- Save time filling out forms
- Instant access to your files
- Convenient tools
- Professional contracts



The screenshot shows the zipForm 6 web application interface. At the top, there is a navigation bar with 'HOME', 'FORMS', 'LOGOFF', 'PROFILE', 'SHOP', and 'SUPPORT'. Below this is a 'Welcome Back training' message and a set of tabs: 'Transaction List', 'Template List', 'Clause Manager', 'My Profile', 'Library Manager', and 'RELAY Manager'. A 'NEW TRANSACTION' button is visible on the left. On the right, there is a 'Transaction Search' input field and a dropdown menu set to 'Active Transactions'. Below the search area is a table with the following data:

Menu	Name	Status	Seller	Buyer	Modified	Created
...	221 Baker Street - Holmes - Broker # 4568	Active	Donald W. Risch		1/27/2010 10:38:37 AM	1/27/2010 10:32:34 AM
...	456 Rinky Drive - Dairy - Broker # 234532	Active	Donald W. Risch		1/20/2010 10:25:20 AM	1/20/2010 10:25:31 AM
...	234 Weekend Way - Frank J Seller	Active	Donald W. Risch		1/15/2010 7:55:25 AM	1/15/2010 7:40:01 AM

zipForm® 6 Training

- 1. Accessing zipForm® 6**
 1. From your desktop (zipForm® 6 Standard)
 2. From any internet browser (zipForm® 6 Professional)
- 2. Opening and filling out forms**
- 3. Saving time using**
 1. The Cover Sheet or Transaction Data Sheet
 2. Look Up Fields
 3. Form Templates
 4. Fast Fill Button
 5. Clauses (saved text and clauses)
- 4. Tools, such as Spell Check**
- 5. Templates and Synchronizing Files**
 1. Creating your own template
 2. Sending your files from Standard (desktop) to Professional (online) storage.

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zipForm® 6

Notes:

How to Sign Up for zipForm® 6

- Visit your association website to take full advantage of member benefits
- If zipForm® is not part of your association or brokerage benefits, sign up at: www.zipLogix.com/zf6



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zipForm® 6

Sign in or Open zipForm® 6

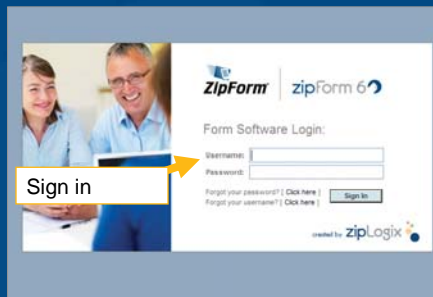
zipForm® 6 Standard:

- Double-click on the zipForm® 6 icon



zipForm® 6 Professional:

- Open your internet browser
- Visit your sign in page (www.zipFormOnline.com)
- Sign in using your username and password



Notes:

Starting a new transaction file in zipForm® 6 Professional (online)

Menu	Name	Status	Seller	Buyer	Modified	Created
▼	221 Baker Street - Holmes - Broker # 4568	Active	Donald W. Risch		1/27/2010 10:38:37 AM	1/27/2010 10:32:34 AM
▼	456 Rainy Drive - Daryl - Broker # 234532	Active	Donald W. Risch		1/20/2010 10:55:26 AM	1/20/2010 10:35:31 AM
▼	234 Weekend Way - Frank J Seller	Active	Donald W. Risch		1/15/2010 7:55:25 AM	1/15/2010 7:40:01 AM
▼	456 Snowy Way	Active			1/13/2010 11:05:12 AM	12/16/2009 10:47:37 AM

Select your forms

Standard users can click the "New Transaction" button here, or start adding forms below

Double-click to open a form, or click and drag the form to your transaction

The screenshot shows a web application interface with a top navigation bar containing 'HOME', 'FORMS', 'LOGOFF', 'PROFILE', 'SHOP', and 'SUPPORT'. Below this is a menu bar with 'File', 'Edit', 'Tools', and 'Help'. The main area is divided into two panes. The left pane, titled 'My Transaction Forms', contains a tree view with a folder '789 Main Street-- Broker ID - 12345' and a sub-item '_COVER - Transaction Cover Sheet'. Below this is a 'Remove Selected Forms' button. The right pane is currently empty. At the bottom, there is a 'Library Forms' section with a dropdown menu set to 'ZIPDEMO - ZipForm Demonstration Library' and three tabs: 'Alphabetic', 'Numeric', and 'Categorized'. A search box is also present. A list of forms is displayed below the tabs, including '.Transaction Cover Sheet - _COVER', 'Additional Provisions Addendum - AAP', 'Buy - Sell Agreement (7 Page) - BUYSSELL', 'Counter Offer - CO', 'Lead-Based Paint Disclosure - LBPD', 'Option to Purchase - OTP', and 'Standard Listing Contract - SLC'. Two yellow callout boxes with arrows point to the 'NEW TRANSACTION' button and the first form in the library list.

Notes:

The forms panel

This form is part of your file. Click to open and fill it out.

Select your library of blank forms here

This icon means this form is already part of your file

Click to show or hide the forms panel

View forms alphabetically, by form number, by category, or search for a specific form

The screenshot shows a detailed view of the 'My Transaction Forms' panel. The top part shows a tree view with a folder '789 Main Street-- Broker ID - 12345' and a sub-item '_COVER - Transaction Cover Sheet'. Below this is a 'Remove Selected Forms' button. The bottom part shows the 'Library Forms' section with a dropdown menu set to 'ZIPDEMO - ZipForm Demonstration Library' and three tabs: 'Alphabetic', 'Numeric', and 'Categorized'. A search box is also present. A list of forms is displayed below the tabs, including '.Transaction Cover Sheet - _COVER', 'Additional Provisions Addendum - AAP', 'Buy - Sell Agreement (7 Page) - BUYSSELL', 'Counter Offer - CO', 'Lead-Based Paint Disclosure - LBPD', 'Option to Purchase - OTP', and 'Standard Listing Contract - SLC'. Five yellow callout boxes with arrows point to various elements: the tree view item, the library dropdown, the first form in the list, the search box, and the right edge of the panel.

Apply Your Template(s)

A template saves you time by adding the forms and information you use in every transaction

File **Edit** **Tools** **Help**

NEW TRANSACTION TEMPLATE OPEN

Apply Template

Select the template you want to add to this transaction
 Note: Applying a template will populate empty fields with template data. If transaction already has forms that have been filled in, some of these values may get changed.

Sale Template
 Residential Listing - PA Listing Template
 Listing Template

Click the appropriate template name (apply office templates first)

Click "Apply Template" on the "File" menu

OK Click OK

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Notes:

The Cover Sheet Form

- Contains basic information about the file
- Information entered here is copied to all forms

File Edit Tools Help

NEW TRANSACTION TEMPLATE OPEN CLOSE SAVE SAVE AS PDF PRINT EMAIL MENU HELP (FILE MENU)

COVER - Transaction Cover Sheet

My Transaction Forms

- Unfilled
- COVER - Transaction Cover Sheet
 - Page 1
 - Page 2
 - Page 3
 - Page 4
- AAP - Additional Provisions Addendum

Remove Selected Forms

Library Forms:

ZIPDEMO - ZipForm Demonstration Library

Alphabetic Numeric Categorized Search

- Transaction Cover Sheet - COVER
- Additional Provisions Addendum - AAP
- Counter Offer - CO
- Lead-Based Paint Disclosure - LBPD
- Standard Listing Contract - SLC

TRANSACTION COVER SHEET

PROPERTY INFORMATION

MLS Number: 12345
 Street Address: 123 Main Street
 City: City
 Township: Local Township
 County: Central County
 State: ST
 Zip Code: 12345

Legal Description:
 Parcel or Tax ID:
 Listing Date:
 Listing Expiration Date:
 Listed Price: \$354,000.00
 Balance of 1st Mortgage: \$1,234.00
 Balance of 2nd Mortgage: \$4,567.00
 Other Liens: \$321.00
 Description of Other Liens: Home Improvement Loan
 Total Encumbrances: \$4,122.00
 Homeowner Assoc. Dues: \$ Homeowner Assoc. Name: _____

Property Includes:
 Property Excludes:
 Leased Items:
 Supplemental Info:

Purchase Price: \$ Settlement Date:
 Purchase Agreement Date: Possession/Occupancy Date:
 Deposit Amount: \$
 Deposit Amount 1st Increase: \$

Enter file information

Entering Data

Look Up fields save you time with information you have already entered

TRANSACTION COVER SHEET
PROPERTY INFORMATION

MLS Number: _____
Street Address: _____
City: _____
Township: _____

789 Main Street
123 Main Street

Click on an entry in the list to automatically fill in this form field.

HOME FORMS
File Edit Tools Help
LOOK UP FIELDS FAST FILL MENU HELP (EDIT MENU)

To remove an item or edit your look up fields, go to the "Edit" menu, then click "Look Up Fields"

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Notes:



Navigating through your forms

TRANSACTION COVER SHEET
PROPERTY INFORMATION

MLS Number: _____
Street Address: _____
City: _____
Township: _____
County: _____
State: _____
Zip Code: _____
Legal Description: _____
Parcel ID: _____
Listing ID: _____
Listing E: _____
Listed Price: _____
Balance of 1st Mortgage: \$ _____
Balance of 2nd Mortgage: \$ _____
Other Liens: \$ _____
Description of Other Liens: _____
Total Encumbrances: \$ _____
Homeowner Assoc. Dues: \$ _____ Homeowner Assoc. Name: _____
Property Excludes: _____
Property Includes: _____
Lead-in Items: _____
Supplemental Info: _____
Purchase Price: \$ _____
Purchase Agreement Date: _____ Settlement Date: _____
Deposit Amount: \$ _____ Possession/Occupancy Date: _____
Deposit Amount 1st Increase: \$ _____
Deposit Amount 2nd Increase: \$ _____
Deposit Amount 3rd Increase: \$ _____
Offer Date: _____
Offer Expire Date: _____ Offer Expire Time: A.M. P.M.
Offer Acceptance Date: _____
Total Amount Financed: \$ _____
Year Built: _____

Change the page

Zoom in/out

Select your form

Expand the form to fill your screen

My Transaction Forms
789 Main Street - Broker ID - 12345
COVER - Transaction Cover Sheet
Page 1
Page 2
Page 3
Page 4


Remove Selected Forms








Library Forms:
ZIPDEMO - ZipForm Demonstration Library
Alphabetic Numeric Categorized Search

.Transaction Cover Sheet - .COVER
Additional Provisions Addendum - AAP
Buy - Sell Agreement (7 Page) - BUYSELL
Counter Offer - CO
Load Based Paint Disclosure - LBPD
Option to Purchase - OTP
Standard Listing Contract - SLC

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Some Useful Form Buttons




-  **Cut / Copy / Paste**
 - Use these buttons to cut, copy, or paste highlighted text in fields
-  **Strike out**
 - Click strike out, then highlight the text you want to line out, or highlight again to remove a strike out (not available in some areas)
-  **Uppercase / Lowercase**
 - Change the text of a field to all uppercase, all lowercase, or capitalize the first letter of each word
-  **N/A**
 - Fill in all blank fields with "N/A" or text of your choosing
-  **Sticky Notes**
 - Post a note on your form (Notes will not print)
-  **Fast Fill**
 - View all of the fields in the form to fill them out quickly
-  **Undo / Redo**
 - Undo or redo the last action on this form

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Notes:

Keyboard Shortcuts

- **Page Up** – Move up one page
- **Page Down** – Move down one page
- **Home** – Jump to the first page of a form
- **End** – Jump to the last page of the form
- **Tab** – Go to the next form field
- **Enter** – Go to the next form field
- **Down arrow key** – Scroll through Look Up Fields
- **Space Bar** – Check off the current check box
- **Space Bar** (in a formatted field, i.e.: date) – Overrides automatic formatting
- **CTRL + C** – Copy
- **CTRL + X** – Cut
- **CTRL + V** – Paste
- **CTRL + Z** – Undo



The File Menu

Helpful menus are at the top of your forms screen

Click to expand the file menu

The screenshot shows the File menu with the following options and callouts:

- NEW TRANSACTION**: Create a new transaction
- TEMPLATE**: Create or apply a template (a saved set of forms)
- OPEN**: Open a saved file
- CLOSE**: Close this file
- SAVE**: Save this file
- SAVE AS PDF**: Save as a PDF to your computer
- PRINT**: Print forms (sub-menu: Print Current Form, Print All Forms, Print Blank Form, Print Sample Form)
- EMAIL**: Send forms to an email address
- FAX**: Fax forms
- eSign**: Send for electronic signatures (sub-menu: Sign, Check Status)
- MENU HELP (FILE MENU)**: Help and FAQs

Notes:

The Edit Menu

Helpful menus are at the top of your forms screen

Click to expand the edit menu

The screenshot shows the Edit menu with the following options and callouts:

- EDIT HEADER**: Edit the name and basic file information
- CLAUSES**: Edit, use or add clauses (saved text for filling in forms)
- NOTES**: Add or edit sticky notes (sub-menu: New Note, Show All, Hide All, Delete All)
- LOOK UP FIELDS**: Edit look up fields (saved form field entries)
- FAST FILL**: View all of the form fields
- MENU HELP (EDIT MENU)**: Help and FAQs

The Tools Menu

The screenshot shows the 'Tools' menu in the zipForm 6 application. The menu items are: SPELL CHECK, MORTGAGE CALCULATOR, MLS CONNECT, OPTIONS, ADDRESS BOOK, and MENU HELP (TOOLS MENU). A yellow arrow points to the 'Tools' menu label with the text 'Click to expand the tools menu'. Below the menu items, callout boxes provide descriptions: 'SPELL CHECK' is for 'Check your spelling'; 'MORTGAGE CALCULATOR' is for 'Calculate mortgage rates and payments'; 'MLS CONNECT' is for 'Import property information from a participating MLS'; 'OPTIONS' is for 'Change settings, such as auto-save intervals'; 'ADDRESS BOOK' is for 'Address Book of contacts'; and 'MENU HELP (TOOLS MENU)' is for 'Help and FAQs'. A dropdown menu for 'SPELL CHECK' is shown with options 'Current Form Only' and 'All Forms In Transaction'. The zipForm 6 logo is in the bottom right corner.

Notes:

Templates

- The electronic equivalent of your “pre-packaged” folders
- Contain the forms for a listing or the forms for a sale based on the type of template created
- Can contain your agent information and other saved information

The zipForm 6 logo is in the bottom right corner.

Creating Templates

1. Click Create Template
2. Label the template
3. (OPTIONAL) You can use an existing template to start your new template

1. Click Create Template

2. Name the Template

3. Apply a template to start (optional)

Notes:

Creating Templates

4. Place forms you need into the template (by either dragging and dropping or double clicking on the forms in the bottom left box)
5. Forms that are part of the template appear under “My Transaction Forms”
6. Fill out the form fields with the data you want in every transaction
7. Save

4. Add forms

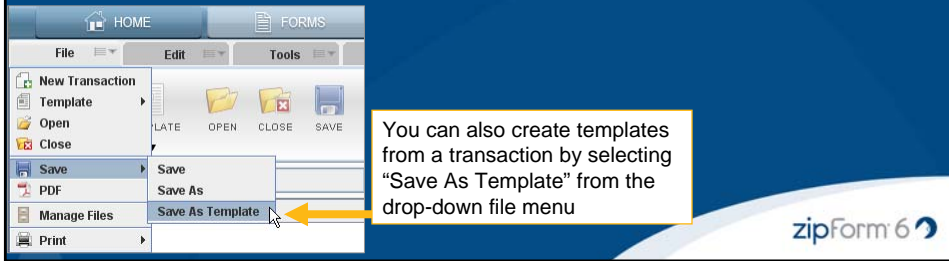
5. Template forms

6. Fill out form fields

7. Save

More on Templates

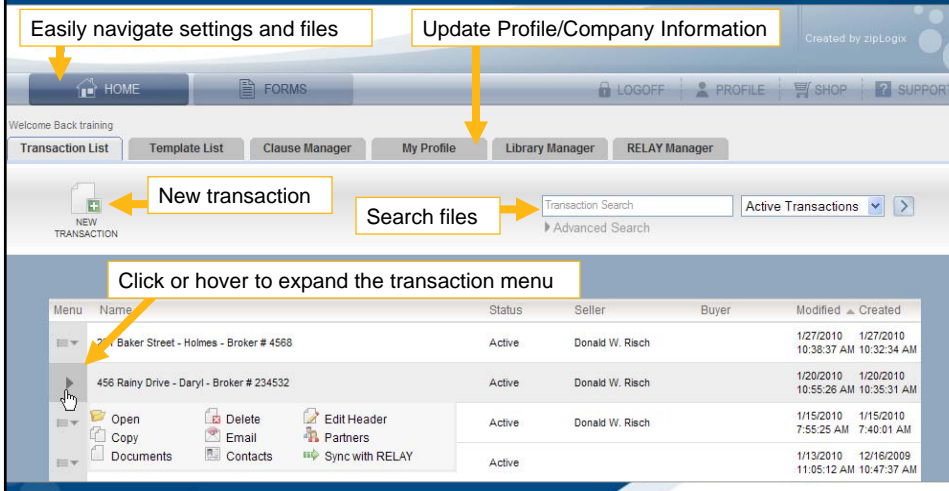
- Fill in all blanks that require your name and address, brokerage, or standard includes, for instance.
- Templates prevent you from needing to retype this information every time you start a new contract.



Notes:

zipForm® 6 Professional Home Page

Work online, from anywhere



zipForm® 6 Elite (Standard + Professional)

Open your Options to connect your Standard (desktop) account to your Professional (online) account

Click Account Tab

Enter your zipForm® 6 Professional username and password

Click OK

Notes:

zipForm® 6 Elite (Standard + Professional)

Click the drop-down file menu to manage files from zipForm® 6 Standard

Check "Include online files"

Also manage Templates and Clauses

See whether a file is stored online or offline

Select one or more files to copy, import, export, or delete

Click "Sync All" to update all files

Transaction Name	Transaction Type	Property Type	Buyer	Seller	Last Updated	Sync Status
Jones Ave	Listing	Residential			02-03-10 11:58	
221 Baker Street - Holmes - Broker # 4568	listing	residential		Donald Risch	01-27-10 10:41	
456 SnowWay	listing	residential			01-15-10 11:07	
Untitled1	Listing				01-08-10 11:07	
456 Main Street	listing				0-09-09 11:27	
123 Oak Park Drive	listing				0-09-08 43	
123 Main Street	listing				1-09-02 53	

Which version is right for me?

- zipForm® 6 Standard Edition**
 - Only works on your desktop, not available from any other computer
 - Use this version if:
 - You do not have regular access to an internet connection
 - You do not want your files backed up online
- zipForm® 6 Professional Edition**
 - Works online, from any computer
 - All you need is a username and password to sign in securely
 - Use this version if:
 - You work at home and in the office
 - You don't want to carry files back and forth
- zipForm® 6 Elite Edition**
 - Allows you to work online or offline
 - Use this version if:
 - You sometimes don't have a steady internet connection
 - You want online backups **and** the convenience of your files online

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Notes:

Broker Enhancements

- zipForm® Professional Broker Version**
 - Broker of record can access all transactions online
 - Work with everyone in your office
- Custom company logos and forms**
 - Add custom company logos
 - Add custom broker forms for your office
- relay® Transaction Management**
 - Access and store transaction files for every agent online or on CD
 - Save money and time with electronic document, workflow, and contact management

Call 866-MY FORMS for pricing and details.

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zipForm® 6

Need Help? Videos and F.A.Q. available 24/7

The screenshot shows the zipForm 6 software interface. At the top, a blue banner reads "Need Help? Videos and F.A.Q. available 24/7". Below this is a navigation bar with "HOME" and "FORMS" tabs, and "LOGOFF", "PROFILE", "SHOP", and "SUPPORT" links. A menu bar includes "File", "Edit", "Tools", and "Help". The "Help" menu is open, showing options like "NEW TRANSACTION", "TEMPLATE", "OPEN", "CLOSE", "SAVE", "SAVE AS PDF", "PRINT", "EMAIL", and "MENU HELP (FILE MENU)". A callout box labeled "Help for this menu" points to the "MENU HELP" option. Another callout box labeled "Support page" points to the "SUPPORT" link in the top navigation bar. A third callout box labeled "Help tab" points to the "Help" menu item. The main workspace shows a form titled ".COVER - .Transaction Cover Sheet" with various fields and a "SELLING BROKER INFORMATION" section. At the bottom, a navigation bar contains icons for "FAQ", "KNOWLEDGE BASE", "ZIPFORM STORE", "HOW TO VIDEOS", "ABOUT ZIPFORM 6", and "HELP". The zipForm 6 logo is in the bottom right corner.

Notes:

Thank You

www.zipLogix.com

Sign in at:

www.zipFormOnline.com

Support.zipLogix.com

The slide has a blue background with a white wave at the bottom. It contains the text "Thank You" in large white letters, followed by three lines of contact information in yellow text: "www.zipLogix.com", "Sign in at: www.zipFormOnline.com", and "Support.zipLogix.com". The zipForm 6 logo is in the bottom right corner.