



The Electronic Transaction

Storing documents and archiving files on zipVault™



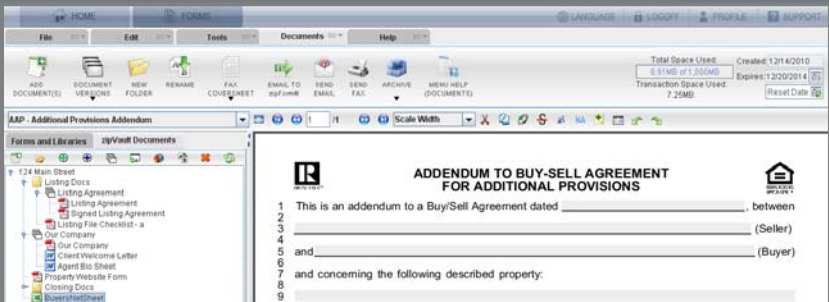
www.ziplogix.com/zipvault



Organized and Online

zipVault™ keeps your documents online, where you need them

- Store documents in your zipForm®6 Professional files
- Send or receive documents via email or fax
- Store and organize folders and document versions
- Archive complete transaction files



The screenshot displays the zipVault web application interface. The top navigation bar includes 'HOME', 'FORMS', 'LANGUAGES', 'LOGOFF', 'PROFILE', and 'SUPPORT'. Below this is a menu with 'File', 'Edit', 'Tools', 'Documents', and 'Help'. A toolbar contains icons for 'ADD DOCUMENTS', 'DOCUMENT VIEWS', 'NEW FOLDER', 'RENAME', 'FAX COVER SHEET', 'EMAIL TO PDF LINK', 'SEND EMAIL', 'SEND FAX', 'ARCHIVE', and 'MENU HELP (DOCUMENTS)'. On the right, a status box shows 'Total Space Used: 8.91MB of 1.00MB' and 'Transaction Space Used: 7.29MB'. The main content area shows a document viewer for 'AJAP - Additional Provisions Addendum'. The document title is 'AJAP - Additional Provisions Addendum'. The document content includes a logo for 'R' and 'ADDENDUM TO BUY-SELL AGREEMENT FOR ADDITIONAL PROVISIONS'. The text reads: '1 This is an addendum to a Buy/Sell Agreement dated _____, between', '2 _____ (Seller)', '3 _____', '4 and _____ (Buyer)', '5 _____', '6 and concerning the following described property:', '7 _____', '8 _____', '9 _____'. The document viewer also shows a 'Scale Width' control and a 'Reset Date' button.

Start Storing Documents Online

1. **Sign in to zipForm® 6**
 - a) To add zipVault™ to your zipForm® 6 account, click the Add Storage button on your HOME page
2. **Open a Transaction**
3. **Add Documents to your zipVault™**
 - a) Upload documents from your computer
 - b) Email in attachments
 - c) Fax in paperwork
4. **Organize Documents with Folders and Versions**
5. **Send or Save Documents**
 - a) Store the files online for a set period of time
 - b) Email or fax documents to anyone
 - c) Download complete file archives

products by ziplogix



Opening zipVault™

zipVault™ can be opened within any zipForm® 6 file

The screenshot shows the zipForm® 6 software interface. At the top, there are navigation tabs for HOME, FORMS, LANGUAGE, LOGOFF, PROFILE, and SUPPORT. Below these are menu options: File, Edit, Tools, Documents, and Help. A toolbar contains icons for NEW TRANSACTION, TEMPLATE, OPEN, CLOSE, SAVE, SAVE AS PDF, PRINT, EMAIL, FAX, xSign, and MENU HELP (FILE MENU). The main window displays a document titled 'SLC - Standard Listing Contract'. On the left side, there is a 'Forms and Libraries' pane with a 'zipVault Documents' folder highlighted. A blue callout box with an arrow points to a zipVault™ icon in the document's header area, containing the text: 'Click to open zipVault™ for this zipForm® 6 file'. The document content includes sections for 'STANDARD LISTING CONTRACT Exclusive Right to Sell', 'LENGTH OF LISTING', 'PRICE & TERMS', and 'PROPERTY: Legal Description'.

Adding Documents

Upload documents from your computer

The screenshot displays the zipVault application interface. At the top, there are tabs for 'HOME' and 'FORMS'. Below this is a menu bar with 'File', 'Edit', 'Tools', 'Documents', and 'Help'. The 'Documents' menu is open, showing options: 'ADD DOCUMENT(S)', 'DOCUMENT VERSIONS', 'FOLDER', 'FAX COVERSHEET', 'EMAIL TO zipForm®', 'SEND EMAIL', 'SEND FAX', 'ARCHIVE', and 'MENU HELP (DOCUMENTS)'. A blue box highlights the 'ADD DOCUMENT(S)' option with the text 'Click here to add documents'. Below the menu is a 'Forms and Libraries' section with a tree view under 'zipVault Documents'. A blue box points to the 'ADD DOCUMENT(S)' icon in this tree with the text 'Or click here to add documents'. To the right, a preview of a 'STANDARD LISTING' form is visible, with a blue box pointing to the 'zipVault™' tab in the interface with the text 'You can also right-click on the zipVault™ tab and select Add Document(s)'. The form preview includes fields for 'Listing Firm', 'LENGTH OF LISTING', and 'PRICE & TERMS'.

Adding Documents

Selecting documents

The screenshot shows a standard Windows 'Open' dialog box. The 'Look In:' field is set to 'Transaction Documents'. The file list contains several PDF files and one message file: 'Listing Agreement.pdf', 'OnlineRealEstate.pdf', 'preclosingchecklist[1].pdf', 'Property_Website_Form_V_1[1].pdf', 'Purchase Agreement.pdf', and 'RELAY Activity Notification.msg'. Four blue arrows point from a text box to the first four files, with the text 'Hold down the CTRL key to select more than one document'. The 'File Name:' field at the bottom contains the names of the four selected files: 'Agreement.pdf', 'preclosingchecklist[1].pdf', 'Purchase Agreement.pdf'. The 'Files of Type:' dropdown is set to 'All Files'. At the bottom right, there are 'Open' and 'Cancel' buttons. A blue box points to the 'Open' button with the text 'Click Open to add these documents'. The zipVault logo is visible in the bottom right corner of the slide.

Adding Documents

Naming documents

Change document names or folder

Enter the names of your documents

Add to folder: 124 Main Street

| File Name | Document Name |
|----------------------------|------------------------|
| Listing Agreement.pdf | Listing Agreement |
| preclosingchecklist[1].pdf | preclosingchecklist[1] |
| Purchase Agreement.pdf | Purchase Agreement |

Click OK and documents are saved online

zipVault

Adding Documents

Email Documents into zipVault™

Click to invite someone to email documents to your zipVault™ file.

Enter a message for the person sending the documents

Click Send

Adding Documents

Fax in Documents to zipVault™

The screenshot displays the zipVault web interface. At the top, there are tabs for 'HOME' and 'FORMS'. Below these are menu options: 'File', 'Edit', 'Tools', 'Documents', and 'Help'. A toolbar contains various icons for document actions: 'NEW', 'RENAME', 'FAX COVER SHEET', 'EMAIL TO zipForm®', 'SEND EMAIL', 'SEND FAX', 'ARCHIVE', and 'MENU HELP (DOCUMENTS)'. A callout box with a blue border and arrow points to the 'FAX COVER SHEET' icon, containing the text: 'Click to print, view, or send a Fax Coversheet that can be used to fax in documents to zipVault™'. Below the toolbar, a file tree on the left shows a folder structure for '124 Main Street', including 'Listing Docs', 'Our Company', and 'Closing Docs'. On the right, a preview of a 'Fax to zipForm®66' cover sheet is shown, featuring a barcode, the number 'ZL123', and fields for 'Send To: 1-248-663-2962' and 'Attention: Cassandra Davis, 124 Main Street'. The Adobe Reader logo is visible in the top right corner of the preview window.

Organize Your File

Drag and drop to store documents together

The screenshot shows the 'Forms and Libraries' section of the zipVault interface, specifically the 'zipVault Documents' view. A toolbar at the top includes icons for 'Add Folder', 'Add Document', 'Move', 'Copy', 'Paste', 'Delete', and 'Refresh'. A callout box with a blue border and arrow points to the 'Add Folder' icon, containing the text: 'Add folders to stay organized'. Below the toolbar, a file tree for '124 Main Street' is shown, with a folder named 'Listing Docs' containing several document versions: 'Listing Agreement', 'Listing Agreement', 'Signed Listing Agreement', and 'Listing File Checklist - a'. A callout box with a blue border and arrow points to the 'Signed Listing Agreement' document, containing the text: 'Click and drag to move a document'. Another callout box with a blue border and arrow points to the 'Add Document' icon, containing the text: 'Add document versions to group together copies of the same document'. The zipVault logo is visible in the bottom right corner.

Thank You

www.zipLogix.com

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www.zipFormOnline.com

Support.zipLogix.com

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