Welcome to the New zipForm® Plus Platform.

This guide will help New & Existing users navigate through the new platform.

What to expect from the New Platform?

- New Agent Dash board
- Easily track all your transaction metrics
- Quickly Access all your Signature packets
- See all Recent transaction activity and more…

*New users will have exclusive access to the new platform.

Existing users will have the ability to toggle from the old platform to the new platform.

**Note: Please scroll down to continue reading the guide or
Click the image below to attend a Live Webinar.
Existing Users

How to access the “New Platform”?

• Click TRY NEW PLUS
### Navigation Bar

The zipForm® Plus Navigation Bar is where you can navigate to different areas of the application.

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>Review transaction details in your dashboard along with many other useful options such as: create a new transaction, manage transactions and view forms.</td>
</tr>
<tr>
<td>Transactions</td>
<td>Review all your transactions, edit, delete, import/export, and create new transactions using various property types.</td>
</tr>
<tr>
<td>Templates</td>
<td>Review all your templates, edit, delete, import/export, and create new templates using various property types.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Review urgent tasks and statuses for all your transactions, edit, delete, and display these tasks in a calendar view. You may also view any cloud-based calendars you currently access such as Google, MS Live and Office 365.</td>
</tr>
<tr>
<td>Contacts</td>
<td>Review parties involved for all your transactions, edit, delete, create new and import/export. You also have the ability to import cloud-based calendars you currently access such as Google, MS Live, Office 365, Top Producer and Yahoo.</td>
</tr>
<tr>
<td>Partners</td>
<td>Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money.</td>
</tr>
</tbody>
</table>
Dashboard

Welcome to the Dashboard! At a glance, along with interactive widgets, agents can review their entire progress for all of their transactions along with viewing forms, manage transactions, and create a new transaction all from one central location.

Map Display

Details pertaining to property information are also displayed on the map within the Dashboard.
Transaction Information

After selecting the transaction type, you will be able to add the necessary transaction information, including importing from your MLS. Please understand that not all MLS’s participate in the utilization of zipFormMLS-Connect®. Please contact your MLS for further details.

Transaction Information

Name
Enter Transaction Name

MLS Property Address

Property Type
- Residential
- Commercial
- Industrial
- Vacant Land
- Multifamily
- Farm and Ranch
- Condominium
- Manufactured Home

Comment
Transaction Comments

Select Template
Select Template

Cancel  Save
Getting around zipForm® Plus: Icon Assistance

Once you are in your transaction, you may notice some new icons and menu options. Please take a moment, familiarize yourself, and see what’s new.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
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<tbody>
<tr>
<td>🏡</td>
<td><strong>Transaction Summary</strong>: Enter Property Information, Listing Information, and Purchase Information.</td>
</tr>
<tr>
<td>👤</td>
<td><strong>Transaction Parties</strong>: Create new parties involved with the transaction. Edit existing parties and collaborate with parties using Private Share.</td>
</tr>
<tr>
<td>📄</td>
<td><strong>Form/Document Access within Transaction</strong>: Access form libraries, add documents, add folders, apply templates and send documents for approval.</td>
</tr>
<tr>
<td>📦</td>
<td><strong>Checklists and Tasks</strong>: Create new checklists, view/edit existing checklists and urgent tasks, delete checklists and view Calendar.</td>
</tr>
<tr>
<td>📝</td>
<td><strong>Notes</strong>: Create reminders that pertain to the transaction. You can choose to e-mail, save as PDF and/or print notes.</td>
</tr>
<tr>
<td>⌚️</td>
<td><strong>History</strong>: Track progress of transactions, review comments, and document approvals.</td>
</tr>
<tr>
<td>🌐</td>
<td><strong>Partners</strong>: Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money.</td>
</tr>
<tr>
<td>✉️</td>
<td><strong>Private Share</strong>: Collaborate with parties by sharing documents. Import parties using your ziplogix™ contacts or pull contacts in from one of your cloud base accounts.</td>
</tr>
<tr>
<td>🌐</td>
<td><strong>Public Share</strong>: Collaborate with parties by creating a public link for parties to access your documents.</td>
</tr>
</tbody>
</table>
Transaction Summary

While in the “Transaction Summary” you can perform a number of actions by quickly accessing the menu you see below:

Transaction Parties

Within the Transaction Summary, you can also access your transaction parties.
Private and Public Share

Within the transaction parties tab, you have the ability to create new parties involved with the transaction. Edit existing parties and collaborate with parties using PrivateShare.

Private Share

Create a private Share, documents and permissions will be granted only to specified user.

Public Sharing

Turn Public Transaction sharing "On": Set an expiration date for the public links to expire. Then select the type of public link to create. Preview the link then copy to your clipboard.

Public Sharing: On
Stop Sharing Date: 08/09/2017

Copy Link: https://r.zipformplus.com/?par=eyIwdWJsawNTaGFyZSI6IjpaMTgtTUJUM3w

Public Share Link:
Select forms and/or documents from below. Click "Preview" to view the link. Click "Copy Link" to copy to your clipboard.

- 987 Habel Road
Form/Document Access

Access form libraries, add documents, add folders, apply templates, and send documents for approval.

Checklists and Tasks

Within “Transactions,” create new checklists, view/edit existing checklists and urgent tasks, delete checklists and view Calendar (A). A checklist can also be created in “Templates”. Once created, these templates, along with the checklists, can automatically be added to your transaction (B).
Notes

Notes containing supplemental information can be added to any transaction.

History

Track progress of all transactions, review comments, and check on the status of a digital signature packet.
Partners Section

zipAlliance™ Partnership Program

Review our growing list of partners. Our zipAlliance™ Partnership program is designed to provide you with products and services that will save you time and money. Sort through categories and learn about the best solution for you.

Guided Help

Guided Help

We understand changes take some time to get used to. We have taken extra steps to make sure we are always there for you when you need assistance. Explore the enhanced Guided Help feature and get step-by-step instructions during your entire transaction creation process.
Support

CAR.ORG/

WEBINAR: knowledge/webinars/zipform/

TRAINING CENTER: zipform/training/

Additional Support: zipform/forms/

C.A.R Customer Contact Center: (213)739-8227

Email: CS@CAR.ORG