# **ZipForm***Online*

**Welcome to ZipForm***Online*

The **ZipForm*Online*** application offers the most flexibility and mobility for **ZipForm** users, since it can be accessed via an internet connection. Users create, store, edit and retrieve in process forms directly on the internet.

Please note: you must be connected to the internet to be able to use **ZipForm*Online***.

**Create a Transaction**

**ZipForm*Online*** requires you to install, and periodically update, an Online viewer. The first time you use **ZipForm*Online***, you will be prompted to download the appropriate viewer.

Once you have installed the viewer and logged into your account using your username and password, **ZipForm*Online*** takes you directly to the **Transaction Window**.

The **Transaction Window** lists all of your saved transactions and is where you create new transactions. From the **Transaction Window**, choose **Add** (**Create). ZipForm*Online*** opens a transaction dialog box where you can assign a name to the transaction, define the property and listing type, and choose a template to base your new transaction on.

**Add/Remove Forms**

When the new transaction opens, **ZipForm*Online*** opens the **Form Manager**, allowing you to choose a library and specific forms to include in your transaction. Once you have selected the forms you would like to start with, click OK and you will go to the transaction. If you would like to add or delete forms while you are working on the transaction, open the **Form Manager**. The **Form Manager** can be opened or closed by clicking on the **Navigation Pane** icon in the toolbar.

The **Form Manager**, on the left top half of the window, automatically maintains a list of the forms you have included in your transaction. Forms appear in either black or blue text. Black forms are forms that you have used before and have been downloaded to your computer. Blue forms have not been used before and still reside on the internet or are a new updated form. Double clicking the name of a form in the form library adds it to your transaction. You may select multiple forms by holding down the Control Key and selecting multiple forms.

Clicking on a form in the transaction and then clicking on **Remove Selected Form tab** will delete that form from the transaction. You can use the **Forms Manager** pane to open forms for editing.

With **ZipForm*Online***, you can always be assured that you are working with the most up-to-date forms. Whenever you log-in to ***ZipFormOnline***, your form library will automatically be checked against our Online Database to ensure that it is current. If a new form is available, it will automatically be used in any new transactions.

Please Note: any existing transactions or templates, however, will continue to use the version of the form you began the transaction with.

## Filling Out Forms

A cover sheet should be the first form you add to a new transaction. They are important for a number of reasons. First, completely filling out the cover sheet will fill out a majority of the information in the forms you have included in your transaction. Second, it provides a single point of reference to view and edit all the basic information related to your transaction.

Once you have added a cover sheet to your transaction, be sure to add all the other forms you will need by double-clicking their names in the **Form Manager**. Once you have filled out the cover sheet and added any necessary forms, you can begin to edit and complete the information in your forms.

To select a particular form to complete or edit, double click on the form you want to edit in the forms manager pane to open it in the form window.

Moving through the fields in a form is simple. You can either click directly on a field using your mouse, or use your Tab key to move through the fields. Holding down the Shift key while you tab will move you backwards through the form.

Only the active page is editable. To move through multiple pages in a form, use the forward and backward arrows in the header bar. To open a different form, double click on the form's name in the Form Manager, or use the pull-down menu in the header bar.

You will notice that there are a variety of different kinds of fields in your form.

To save you time typing and formatting, **ZipForm*Online*** includes an auto-formatting feature on certain types of fields. For example, when you enter numbers in a dollar field, **ZipForm*Online*** automatically places the decimal in the correct place. When entering telephone numbers, **ZipForm*Online*** automatically adds parenthesis around the area code.

To reduce the time you spend typing and retyping, **ZipForm*Online*** keeps a record of entries on certain data fields in your forms, such as email addresses, city names, etc., in an easy-to-access drop-down list. When you activate a field like City, you can "look up" Cities you have already used by clicking on the drop-down arrow and selecting the appropriate City. You can also scroll through the list with the arrow keys or a roller on a mouse.

Whenever you need to enter a date on a form, a calendar pops up when you click on the date field. You can use the arrows on the calendar to scroll through the months and select the appropriate date. Or, if you wish to type directly into the date field, you can use the **space bar override**.

**Check Boxes** are simple to mark. You can click directly on the box with your mouse to mark it, and click on it again to unmark it. If you are tabbing through fields, simply hit the space bar when you reach a check box to select it.

**Deleting Look-ups/ Auto-Format Override**

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Under the file menu, in the lookup fields tab, you are able to edit lookup list.

Whenever you need to enter a date on a form, a calendar pops up when you click on the date field. You can use the arrows on the calendar to scroll through the months and select the appropriate date. Or, if you wish to type directly into the date field, you can use the **Space Bar Override**.

**Space Bar Override** - Certain fields include automatic formatting of text or number features; the date field, for example, pops up a calendar and the dollar field automatically enters numbers in dollar amounts. To override this feature, simply click on the field and press the space bar. You can then type the text you need directly into the field.

**Opening/Sorting Existing Transactions**

From the Transaction Window you can import, export, edit, save, delete and email transactions from this window. Existing transactions can be organized and sorted by transaction or property type, or can be located by name by clicking on the heading name.

The **Transaction Window** allows you to search and find existing or inactive transactions. Fill in or select the appropriate information and click **Find**.

To find a particular transaction, use the **Find Transaction/Template** window, which will remain in a separate window layered beneath any open transactions, and enter the criteria you know, such as the transaction name and type. **ZipForm*Online*** will locate the file for you. To sort your list of transactions, simply click on the column you wish to view your transactions sorted by. For example, if you want to view your transactions by the date they were created, click on the column labeled Created. Your transactions will now be listed according to the date they were created, beginning with the oldest. To toggle the order in which they appear—to view the most recently created at the top, for example—click on the column name again.

The **Transaction Window** is where you will manage all your administrative tasks. Each transaction in your list has a drop-down actions list where you can choose which activity you want to perform.

- Open: opens the transaction in the form viewer
- View Header: displays transaction header information
- Edit Header: allows transaction header information to be edited - name and attributes (type/status)
- Save As: allows you to save a copy of a transaction or template with another name and perhaps in a different place or to a removable disk
- Delete: removes the transaction from the list
- Email: allows you to email the transaction as a ZipForm or PDF file
- Export: downloads transaction to your computer for opening in the **ZipForm*Desktop*** application.

With **ZipForm*Online***, you can always be assured that you are working with the most up-to-date forms. Whenever you log-in to **ZipForm*Online*** your form library will automatically be checked against our Online Database to ensure that it is current. If a new form is available, it will automatically be used in any new transactions. Please Note: any existing transactions or templates, however, will continue to use the version of the form you began the transaction with.

**Saving Transactions**

Any time you make changes on a form, the form must be saved before you close the transaction. We recommend that you save after every page. You can save to the current directory where the transaction is located by simply clicking on the disk icon in the toolbar or by choosing **File >> Save**.

To make a copy of the transaction, from the web interface page, select **Save As** from the drop-down actions list on the name of the transaction in the Transaction Window. This will allow you to make a copy of the transaction, making modifications to the transaction without overwriting the original transaction.

To save a transaction onto a disk, CD, or other removable media, from the web interface page, select **Export** from the drop-down actions list on the name of the transaction in the **Transaction Window**. Choose the disk drive you wish to save to and click **Save**.

**Printing Forms**

To print all pages of an active form, simply click on the printer icon in the toolbar. Selecting **Print All** from the dropdown menu next to the printer icon will print a copy of every form in the current transaction.

Selecting **Print Current Form** from the dropdown menu next to the printer icon will only print the current form that is on your screen.

To print a blank form, create a transaction with the form(s) you wish to print and **Print Current Form** or **Print All**.

**Templates**

**ZipForm*Online's*** template feature is a great time-saver when you know you are going to be using the same basic type of transaction repeatedly.

Since templates and transactions are so similar, template management is combined with transaction management in the **Transaction Window**. From the Transaction Window, choose **Add** (**Create)**. **ZipForm*Online*** opens the dialog box where you can name your template and define property and listing type. The key is to make sure that the transaction is identified correctly as a new template by selecting **Agent Template** from the Transaction/Template drop-down list. If you want to base your template on one that already exists, choose the name of the existing template from the **Template** drop down list.

(Administrators of Broker accounts can also add **Global and Location Templates** that can be used by everyone who is in their group.)

Now you can add all the necessary forms and fill in any information that will remain the same from transaction to transaction—agent and broker information, disclaimers and contingencies, for example.

Click on the disk icon to save your template. The new template will be available the next time you create a new transaction. You can base a new transaction on an existing template by selecting a template from the drop down list in the **Add Transaction/Template** window.

**Cut, Copy, Paste**

This is a very common computer feature allowing a user to cut or copy content from another document or from another form and paste it into a field. Highlight the content and click cut or copy. Then put your curser on the field you wish to insert the content in and click paste.

This is particularly helpful when creating clauses with the clauses editor as well as property descriptions and/or numbers from other documents.

**Emailing Transactions**

Emailing ZipForm files to others has never been easier. The most common way to send files over the internet is as a **PDF**, or **Portable Document Format**. **PDF** files emailed through **ZipForm*Desktop*** are locked and are very secure. They cannot be edited or changed. The vast majority or 95% of transactions are sent as PDF files.

You may also send files as a **ZipForm** file. The most common reason to send a file as a **ZipForm** file is if you want the receiving party to be able to make changes to the document. For example if you are sending the file to a teammate, broker or assistant.

You do not have to exit the program to email forms to another party. From the **File** menu, select **Send Mail** or click on the email icon on the top menu bar. You have the option of sending the file as a **PDF** or as a **Transaction File**, and can select and deselect the forms you want to include in the transaction. **ZipForm** then opens a new email message with your selected forms attached. You can enter a message if you want and even attach additional files or a picture perhaps. Then simply enter the recipient's email address and click send to send your file.

You can also send transactions via email without opening the transaction. From the web interface page in the **Actions** dropdown, select Email and follow the above steps.

**Clause Manager and Editor**

**ZipForm*Online's* Clause Manager and Editor** work similar to the way templates work. Many transactions require the same clauses, so the **Clause Manager and Editor** allow you to compose and catalog an unlimited number of clauses. Unlike **ZipForm*Desktop***, you must add clauses through the **Clause Manager** without a transaction being open.

From the web interface page, select **Clause Manager** in the top right corner. There are three levels of clauses that can be set up. Global and Location are for special Broker Online accounts. All Online accounts are able to set up Agent Clauses.

Select the category or Add New, select the title or Add New, then enter the clause or edit a current clause and click save.

Once you have added clauses to your library of clauses through your **Clause Manager** you can add specific clauses to your transactions using the **Clause Editor** from within the program.

Click on a field that is large enough and appropriate to accept a clause, then click on the Clause icon (the pencil on the toolbar). Locate the appropriate clause and select **Use Clause**. The clause will be pasted into the selected field.

**Dialog View**

Using the **Dialog View** is a simple way to fill out forms and/or to check to be certain all field are filled out in a transaction. When you select the **Dialog View** from the toolbar by clicking on the icon, the verbiage of the contract disappears and only the information fields are visible. You can quickly tab or click through the fields and enter information. When you close the **Dialog View**, the contract verbiage is visible, along with the information you entered into each field.

**Strike Out**

Being in the real estate industry, you are probably familiar with striking a phrase in a contract. **ZipForm*Online*** has included **Strike-Out** as an editing feature in its program. **Strike-Out** allows you to mark language you want to cross out without actually deleting the language from the form. Any language you strike-out will print with a line through it.

To access the **Strike-Out** feature, click on the icon in the toolbar (the "S" with the line through it). Your mouse cursor will turn into a hand. Click at the beginning of the area you wish to strike-out, and drag across the language while holding your mouse button down. To continue working on the transaction, simply click on the **Strike-Out** icon again or begin typing in one of the fields. To remove a **Strike-Out**, simply click on the **Strike-Out** icon and then double-click the **Strike-Out** you wish to remove.

Please note, you are not able to use the **Strike-Out** feature on some language in certain forms.

**Spell Check**

**ZipForm*Online*** offers a limited spell-check function that will identify typos and unknown words in your form fields. It does not check spelling in the form text itself. To access **Spell Check**, click on the icon in the toolbar or access from the File Menu >> Spell Check.

Please note, you must spell check each form.

**Mortgage Calculator**

By selecting the **Mortgage Calculator** icon from the toolbar, you can quickly enter the loan amount, number of months, and interest rate to calculate a monthly mortgage payment. You can also calculate Hazard Insurance, Taxes, Mortgage Insurance and other pertinent monthly payments. The amounts can then be copied and pasted into the correct fields. While on the form, click on the appropriate field, then on the Mortgage Calculator, click on the Paste icon to the right of the calculated field and it will populate the appropriate field.

When figuring **Monthly Expenses**, you are able to enter the yearly figure followed by "/" which will convert the total into a monthly expense. You are also able to enter a number (a percentage rate) followed by "%" which will calculate the percentage of the loan value.

**Sticky Notes**

**Electronic Sticky Notes** allow users to "stick" notes anywhere on any open form. To create a new note, click on the **Sticky Notes** icon in the toolbar (the little yellow pad on the toolbar.) A note sheet will appear where you can enter any length of notation.

Click, hold and drag the lower right corner of the note to change the size of the note. To move the location of the note, click, hold and drag the title bar to the desired location.

You may also modify the caption, color and font by clicking on the icon in the top left corner of the note.

To view text hidden by a note, select **Hide All** from the **Notes** icon. To show all the notes again, select **Show All**. **Delete All** removes all sticky notes from the active page.

The sticky notes feature is really for reminders for oneself, a partner or team member. A sticky note will not be visible in a PDF email or when a document is printed.

**Save to PDF**

To save a **ZipForm*Online*** transaction as a **PDF** file, choose **Export to PDF** from the file menu within a transaction. **ZipForm*Online*** will ask you to name the file and choose the location where you want the file saved. If you're not sure where to save the file, keep it in the defaulted **My Documents** file. It can always be moved later. You may want to save your transactions as a **PDF** and put it on a CD for your clients when you are all done with the deal.

This is an alternative way to send your documents in an email as well. Open your email program and attach the saved **PDF** to your email.

**Importing/Exporting with ZipForm*Desktop***

**ZipForm*Desktop*** and **ZipForm*Online*** are designed to be completely compatible with each other and work together seamlessly to share files easily between the programs. Users who work in multiple locations or need to share files with users in another location will discover ZipForm's ease of use…whether using **ZipForm*Desktop*** or **ZipForm*Online***. You can easily export and import from Desktop to Online or vice versus.

**Opening Desktop Files in Online**

When you are working in **ZipForm*Desktop*** and have a transaction that you would like to use in **ZipForm*Online***, it is best to **Save As** to a location that you can easily find.

To open a **ZipForm*Desktop*** file in **ZipForm*Online*** that you have saved on your computer, select **Import** from the **Transaction Window** of the **ZipForm*Online*** program. Locate the transaction on your hard drive or removable media and click **OK.** **ZipForm*Online*** will import the file and open it in the **ZipForm*Online* Viewer** as a new transaction. You are now able to edit the transaction in the **ZipForm*Online*** application. Be sure to save your new **ZipForm*Online*** transaction before logging out.

**From Online to Desktop**

To transfer a file from **ZipForm*Online*** to **ZipForm*Desktop***, on the web interface page, select **Export** from the drop-down actions next to the transaction you wish to export. Or from within the transaction, select **Export to Desktop** from the **File Menu**. Choose the location you want to save to on your computer or removable media and click **OK**. You will now be free to edit your files in **ZipForm*Desktop.***

**Opening Online Files in Desktop**

To open a **ZipForm*Online*** file in **ZipForm*Desktop*** that you have saved to your computer or removable media, simply locate the file and click on it. This will open the program and the file.

If the program is already open, you may select **File >> Open**. Browse to locate the transaction on your hard drive or disk media and click **OK.** **ZipForm*Desktop*** will import the file and open it as a new transaction. Be sure to save your new **ZipForm*Desktop*** transaction before closing.

**Electronic Signatures**

While the industry has quickly adapted to exchanging *documents* electronically, the process of getting a *signature* has long been the show-stopper that delays the completion of transactions. Collecting signatures used to mean physically moving paper from one location to another or relying on faxed copies that are hard to read and legally unreliable. With ZipForm's new ***Esign*** service, physical pen-and-ink signatures are a thing of the past. **ZipForm*Esign*** offers an efficient, cost-effective, and completely legal alternative to traditional signatures, allowing documents to be signed and initialed from anywhere in the world.

Collecting an electronic signature is a simple process. If you can send an email, you can send documents online for clients to sign electronically. The only technical requirements are a valid email address and an internet connection.

***Desktop users must be connected to the internet in order to send files to be signed electronically.***

Users are required to register an *Esign* account and create a personal electronic signature before documents can be sent.

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**.

Please go to www.zipform.com/SignIt for costs and more information.