ZipForm*Desktop*

Welcome to ZipForm*Desktop*

The **ZipForm*Desktop*** application has become the standard in electronic forms software. It is installed locally on a computer or network.

Creating a Transaction

Once you have entered your username and password (if necessary), **ZipForm*Desktop*** will open the **Transactions Manager**. This is where you manage all of your transactions—create, delete, and open for editing. We'll begin by learning how to create a new transaction, so choose **Create New**.

Next, select the forms library associated with this transaction from the drop-down list. (If you have access to only one forms library, it will take you straight to the Transaction Header Menu).This opens the **Transaction Header Menu**, where you can define the type of transaction you are creating (listing, purchase or lease), the type of property (residential, commercial, industrial, or vacant land), and basic information about the transaction (property address, buyer and seller name and address).

Completing the transaction header is recommended. This information will populate into the forms you will be selecting, so you won't be wasting your energy. By accurately choosing the transaction and property types, you will later be able to search for transaction using these types as criteria.

If you want to base your transaction on an existing template, you can choose one from the drop-down template list at the bottom of the screen.

Add/Remove Forms

Once you have completed the basic information in the transaction header and clicked OK, the **Form Manager** will open. The **Form Manager** allows you to:

- View forms in organized categories
- Show the forms that you have selected for each transaction
- Add and remove forms from a transaction
- Select a form library
- Open forms for editing

Forms are sorted into categories, which may be viewed on the left side of the window. The forms listed in each category have been determined by your association.

You can locate forms to add to your transaction in one of three ways. First, you can click on a category and scroll through the forms. Or, to view all the forms in a particular library, select the "All Forms" category. If you know the name or number of a particular form, you can also click on the **Search** icon to locate a form.

When you find a form you want to add, highlight the name of the form by clicking on it and select **Add Form** at the bottom of the window. Repeat this process until all the forms you need have been added to the transaction. Or select multiple forms by holding down the **Control Key** and clicking on the desired forms. Then select **Open** to open the transaction.

Icons at the top of the **Form Manager** allow you several options for the lists of forms, including previewing, searching and printing the list.

The **Form Manager** will also allow you to quickly and easily remove forms from a transaction. In the **Transaction** category of the window, select the form you want to delete and click **Remove Form**. To remove multiple forms, hold down the control key while you select each form name and then click **Remove Form**.

To access the **Form Manager** when you have a Transaction open, click on the add/remove forms icon or **Add / Remove Form**… from the **File Menu.**

Filling Out Forms

Completing the **Cover Sheet** is highly recommended for several 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 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, choose which form you wish to complete from the drop-down list of forms or 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 kinds of fields in your form.

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

ZipForm*Desktop* keeps a record of entries on certain data fields in your forms, such as addresses, email addresses, city names, etc., in an easy-to-access drop-down list. This is called a **Lookup 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 down 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 override the Auto-format with 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

To reduce the time you spend typing and retyping, **ZipForm*Desktop*** keeps a record of entries on certain data fields in your forms, such as addresses, city names, states, etc., in an easy-to-access drop-down **Look-up List**. When you activate a field like Address, you can “look up” addresses you have already used by clicking on the drop-down arrow or by using the arrows on your keyboard, scrolling through the data, and selecting the appropriate address.

Look-up lists can be edited for your convenience at any time. From the **Tools** menu of the menu bar, select **Options > > Lookup**. You can select a lookup tag by clicking on the arrow and choosing one from the drop-down list. The list entries will be displayed in the window below the selected lookup tag. To remove an item from the list, select the item and click **Remove**. Select **Add** to add an item to a list. To clear the entire lookup tags menu, select **Clear**.

If the information you need to use is not in the lookup list, simply type it into the field. **ZipForm*Desktop*** will automatically add it to the list for future use.

Certain fields will auto format information to the most commonly used format. These fields include Social Security numbers, phone numbers, money, percentages as well as dates. For date fields, a calendar pops up when you click on the arrow at the right of a 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**.

Auto-Format 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

The **Transaction Manager** opens a list of existing transactions. The **Transaction Manager** window opens when you first enter the program, can be accessed from **File** >>> **Open Transaction** or from the **Open Transaction** icon on the menu bar.

To open an existing transaction, double click on the Transaction you wish to open or highlight the transaction and select open.

The **Transaction Manager** window allows you to search and find transactions. Access the **Search** feature by clicking on the binoculars at the top or the Search button at the bottom. Fill in the appropriate information and **Start Search**.

You may also limit the transaction list by choosing the Transaction Type and/or Property Type. This will only list those transactions that where categorized as such when you created the transaction.

Saving Transactions

Any time you make changes to a form, the form must be saved before you close the transaction. You can save to the current directory where the transaction is located by simply clicking on the disk icon in the toolbar. Or, to save a transaction onto a disk, CD, or other removable media, simply select the **Save Transaction As** option from the file menu. Choose the disk drive you wish to save to and click **Save**. You will receive a confirmation when your file has successfully been saved.

Printing Forms

To print all pages of an active form, simply click on the printer icon in the toolbar. More printing options are found in the **File** menu or by clicking on the dropdown next to the printer icon. For example, selecting **Print All** from the **File** menu will print a copy of every form in the current transaction. **Print Blank Form** prints a copy of a form with blank fields. Selecting **Print Sample** will print a copy of the active form with the words SAMPLE grayed out behind the text. This might be done to give to someone as you are still working on a transaction as a draft copy, or this could be a way to educate a client/prospect on the forms they will need to be filling out to do a real estate transaction.

Templates

The **ZipForm*Desktop*** template feature is a great time-saver when you know you are going to be using the same basic transaction repeatedly. Creating a template is a simple process. First, open an existing transaction or create a new transaction from scratch that will serve as a basis for future transactions of the same type; for example, a listing transaction. The transaction you open or create should contain all of the forms, including the cover sheet, which you will be using repeatedly. You should also enter any data that will stay the same, such as broker name, agent name, addresses, phone numbers etc. You may also put in clauses that are used in all or almost all of these types of transactions.

With the transaction open, select **Save Transaction As Template** from the **File** menu in the toolbar. You can also select **New Template** from the **File** Menu. Name your template and select **OK**. Your template will now be available in the **Transaction Header** window when you create a new transaction.

To modify information contained in an existing template — for example, the address or phone number of your brokerage — begin by selecting **Open Transaction** from the **File** menu. The **Transactions Manager** will open. Click on the Templates folder to the left and highlight the name of the template you wish to modify. Click **Open** to open the template. You can now modify the information in the template's forms, add or delete forms from the template. Be sure to save your changes when closing the transaction.

Please note: if a form is updated, be sure to change that form in your templates.

Cut, Copy, Paste

ZipForm*Desktop* includes typical cut, copy and paste functionality. 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.

Uppercase, Lowercase, Capitalize

ZipForm*Desktop* includes the ability to make all the letters in a field **U**ppercase or **L**owercase or use standard **C**apitalization.

Simply click on the field and the U, L or C in the toolbar.

Emailing Documents

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. The recipient must have ZipForm to be able to edit the transaction. A simple reader is automatically included in the email if you want to send the transaction as a ZipForm file but do not want the recipient to make any changes.

To Email a transaction, with a transaction open, 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 **ZipForm 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.

Clause Editor

The **ZipForm*Desktop* Clause Editor** goes hand in hand with templates. Many transactions require the same clauses, so the **Clause Editor** allows you to compose and catalog an unlimited number of clauses. Once a clause has been added into the Clause Library, it can be recalled and inserted into any form at any time.

The **Clause Editor** can be accessed by selecting the **Clause Editor** icon (the pencil) from the toolbar or by selecting **Clause Editor** from the Tools menu. Once the clause editor window is open, you can create new clauses, insert a clause, edit or delete a clause.

To create a new clause, select **New Clause**. Clauses are stored in categories and named individually for easy future reference. Be sure to enter the category and title of the clause you are creating. Enter or paste the text of the clause into the text window, and select **Save Clause**.

To edit a clause, select the category and title of the clause and click **Edit Clause**. You can change the text of the clause as needed. Be sure to save any changes.

You can also delete any clause by selecting the category and title of the clause you want to remove and clicking on **Delete Clause**.

Once a clause has been added to a transaction, that clause can be edited in the transaction without the saved clause being affected.

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 or deleting a phrase or clause in a contract. **ZipForm*Desktop*** has included strike-outs as an editing feature in its program. **Strike-Out** allows you to mark language or clauses that you want to delete without actually deleting them from the form. Any language you strike out will print with a line through it, allowing you to review changes to your document before finalizing them.

To access the strike-out feature, click on the **Strike-Out** icon (the S with the like through it) in the toolbar. Your 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 remove a strike out, simply click on the strike-out icon and double click on the area that is struck out.

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

Spell Check

With the **ZipForm*Desktop*** spell check feature, users can practically eliminate typos and misspelled words on their forms. By clicking on the **Spell Check** icon, **ZipForm*Desktop*** will check all the fields in your form for misspellings. Users can also add words—such as names, addresses, etc. —to the standard dictionary.

Please note, you must spell check each form in a transaction.

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 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 amount.

Sticky Notes

No doubt you've written your share of reminders and to-dos on those yellow sticky notes and placed them on paperwork, your desk or computer monitor. **ZipForm*Desktop*** offers the same convenient, quick way to make notes — without the mess of yellow paper.

These electronic sticky notes allow users to "stick" notes anywhere on any open form. To create a new note, select **Notes >> New** from the **Tools** menu, or by selecting **New Note** from the **Notes** icon (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.

Applying a Template to an Existing Transaction

You can apply a template to an existing transaction by clicking the Apply Template icon in the toolbar or in the tools menu. When you apply a template, it will add any forms and information in the template to the existing transaction.

Save to PDF

To save a **ZipForm*Desktop*** transaction as a **PDF** file, choose **Export to PDF** from the file menu. **ZipForm*Desktop*** will ask you to select which forms you want to export to PDF, choose the location where you want the file saved and to name the file. 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*Online*

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.

Check for Updates

A screen may appear that refers to checking for updates. This feature will check for software as well as form updates. At this point click **Options** and you may select how often you would like the program to check for updates. When connected to the Internet you will have the option of checking daily, weekly or monthly.

If you are not connected to the Internet or do not wish to check for updates at this time you may press the cancel button.

You may also disable the Automatic check for updates feature from the options button.

While in the updating process, you may **Click here for the revision list**, to view the list of forms that have been added or updated.

You may check for updates at any time by selection **Help >>> Check for Updates**.

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.