zip Vault Training

Adding, storing, and sharing documents, PDF Files, and folders to a zipForm® Plus transaction



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Go Beyond

Welcome to zipVault® training for agents using the new zipForm® Plus.

The zipForm® Vault feature inside of zipForm® Plus allows seamless integration of documents, including PDF files, excel spreadsheets, word documents and property photos within the zipForm® Plus file. Store and share file documents with anyone, and save the zipForm® Plus file securely online for years, as part of the complete zipLogix® transaction.

zipVault® Training Outline

1. Adding documents

- 1. Upload
- 2. Email attachments to zipVault®
- 3. Fax paperwork to zipVault®

2. Share documents

- 1. Email or fax
- 2. Share online
- 3. Organizing the file

4. Storing and saving the file

- 1. The zipVault® Expiration date
- 2. Changing file status to Closed or Inactive
- 3. Downloading a copy of the file



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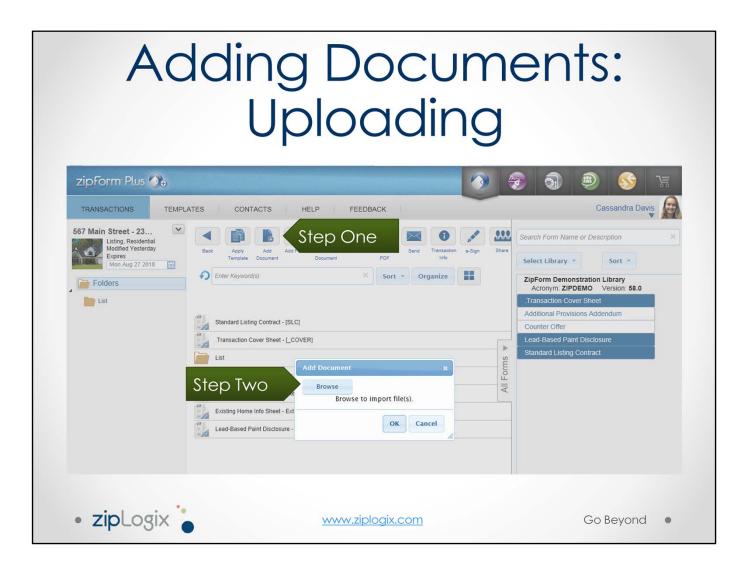
Go Beyond

This training will give you the tools you need to successfully store and manage documents online through the zipVault® feature within zipForm® Plus.

During this training, you will learn how to upload files (including PDFs, word documents, excel spreadsheets, powerpoint presentations, pictures of the property, emails, and more) alongside your zipForm® forms and contracts. This allows you to keep track of all parts of the file from one convenient location, provide links to view documents to file participants, and gives you the opportunity to organize documents and forms into folders and versions as needed.

Once the file is closed, zipVault® documents, including signed files, can be stored online until a set expiration date. As the agent, you can set the expiration date to the day, month, and year that makes the most sense for storing this file online. After that date, the file will no longer be stored online.

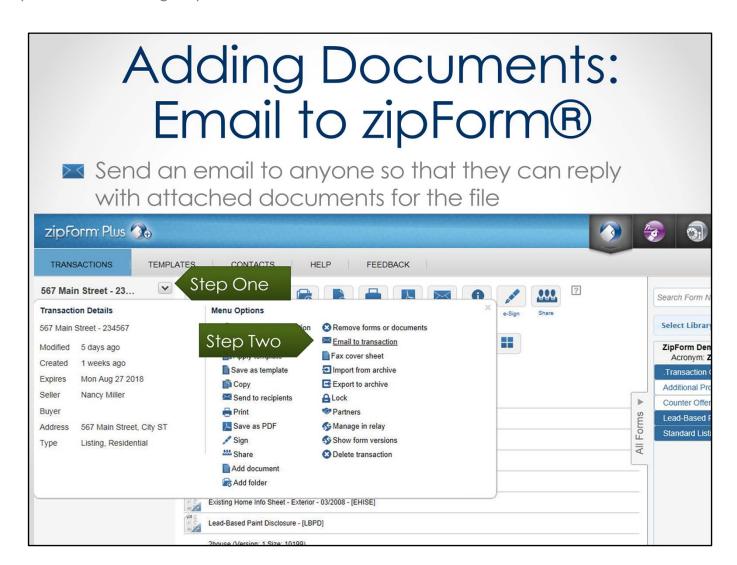
To better manage your files, you are also able to download (export) an archive of the file so that you can save the file contents offline, and you are able to change the file status to Closed or Inactive, which will keep the file (including zipVault® files and zipForm® contracts) online until the expiration date, but will hide it from your main list of transactions.



Documents that are not harmful to your computer or other computers can be uploaded and saved inside of zipVault®.

Browse for a file, such as a PDF, Excel Spreadsheet, Word document, PowerPoint, Image, Email file, or other document stored on your computer, and click on the file name. Click **OK** to upload the document.

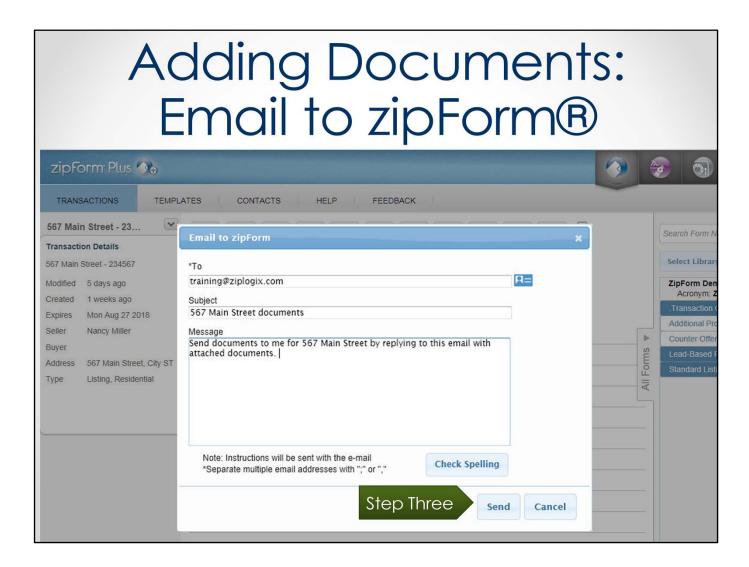
Once documents are uploaded to a zipForm® file, it is considered to be a zipVault® file. It will have an expiration date (visible on the side panel within the transaction), and will have the gray zipVault® icon on the file information in the Transactions page.



The **Email to transaction** option is located within the file menu when you are inside of a zipForm[®] Plus file. To access the **Email to transaction** option:

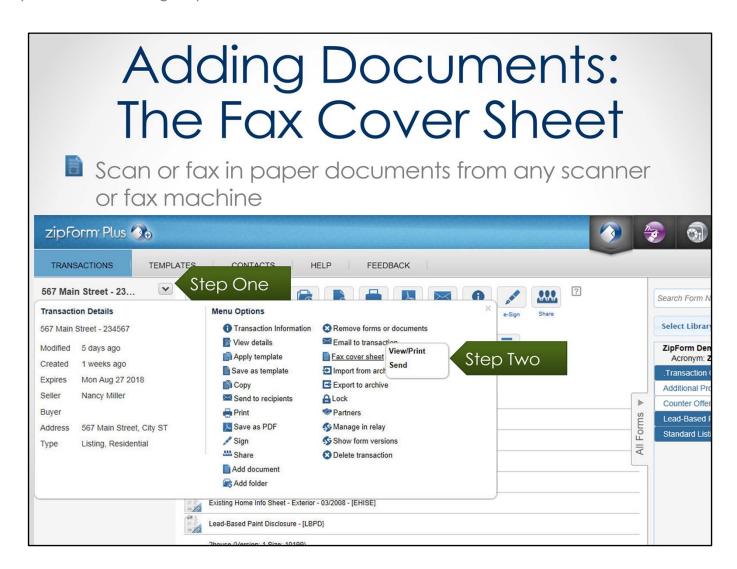
Step One: Click the down arrow button on the left side of the file (next to the photo of the property) to access the file menu within a zipForm® Plus file

Step Two: Click Email to transaction



Enter an email address in the "**To**" field to send the Email to zipForm® request (Tip: enter an email address from a contact saved in your transaction or your zipForm® Contacts by clicking the blue contacts button).

Add a **subject** line and **message** for the recipient, then click **Send.**

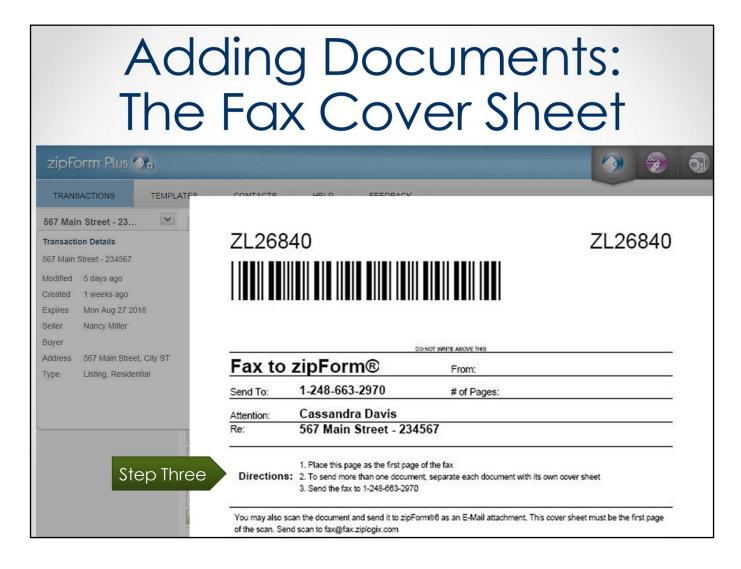


The **Fax cover sheet** allows you to download or send a PDF which can be used to fax or scan documents to zipVault[®]. The **Fax cover sheet** option is located within the file menu when you are inside of a zipForm[®] Plus file. To access the **Fax cover sheet** option:

Step One: Click the down arrow button on the left side of the file (next to the photo of the property) to access the file menu within a zipForm® Plus file

Step Two: Click Fax cover sheet

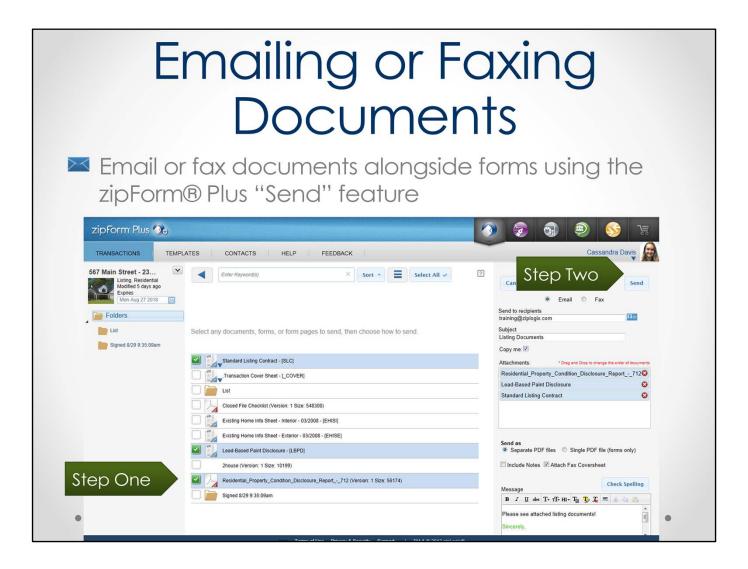
You have the choice of viewing the fax cover sheet or sending it (via email or fax) to another person, for their use.



When the fax cover sheet is opened, it contains the directions for faxing to zipForm[®]. Most importantly, this cover sheet must be the first page of the fax that is sent, so that your documents can be processed properly by the zipForm[®] Plus fax system.

You can also use a scanner that is enabled to send to an email address. Use the cover sheet as the first page of the scan, and send to fax@fax.ziplogix.com

Using this cover sheet, anyone can fax any document(s) to your zipForm® file. Faxed in documents appear as a PDF file, with the fax cover sheet as the first page of the file, within 30 minutes of the fax being sent.



When sending an email or fax from zipForm®, you can also include any documents that have been saved as part of the file by uploading the documents, emailing to zipForm®, faxing to zipForm®, or completing signing through zipLogix Digital Ink® or TouchSign®.

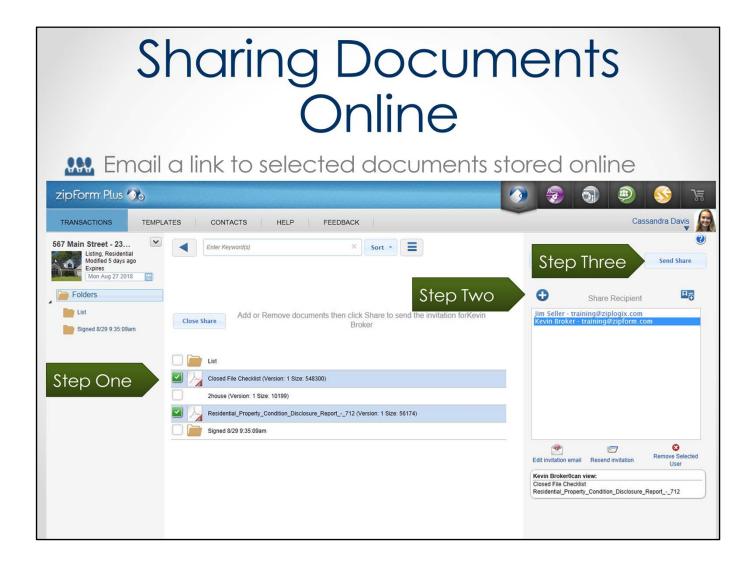
Click to select documents to send alongside forms, choose whether you are going to email or fax the forms, enter a recipient and click **Send**.

You may also select the **Attach Fax Coversheet** option whenever sending documents or forms in order to allow the recipient to fax back the forms to zipForm® Plus.

While forms can be sent as separate PDF attachments or as one single PDF, file attachments are always sent as independent attachments.

It is a good idea to be aware of how much you are attaching to an email. Some email programs will not accept attachments over a certain size. If that is the case, you always have the option to share

documents online in order to avoid potential problems when sharing documents or forms.



Click the zipForm® Share button located on the quick tools menu in the zipForm® Plus file in order to set up documents to be shared with any recipient.

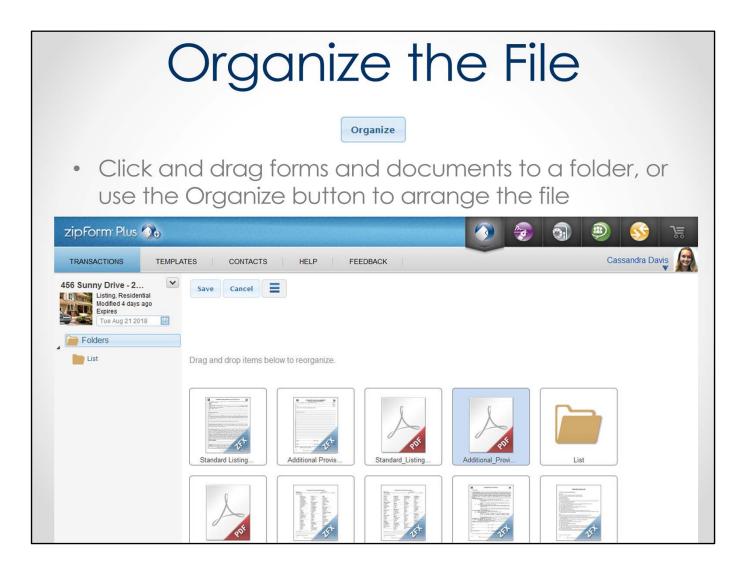
Any documents inside the zipForm® Plus file can be shared.

Check the documents that should be shared, then click the Add (+) button, or the add from contacts button in order to enter a recipient for the documents.

Click **Send Share** to send the recipient an email with a link to view the documents.

Click on a recipient name to edit the documents that he or she can see, or to resend the invitation to view selected documents. The link to view documents will stay active to that recipient until you remove the selected user.

Tip: Share forms as PDF documents by adding them to the file first using the Save as PDF button

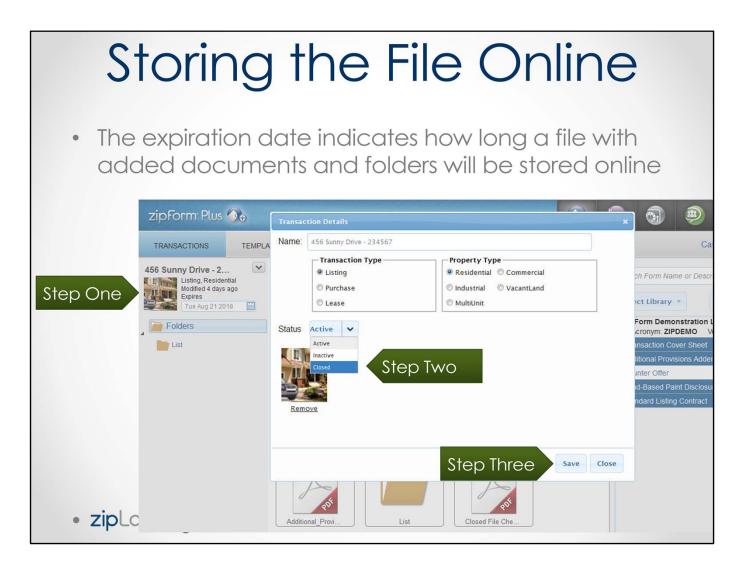


Drag a file or form into a folder in order to place it into that folder at any time.

While you are working inside a file, the default sort order is created by placing the forms, documents, and folders in the order by which they were added to this transaction file.

To change this default order, click the **organize** button, then drag and drop files into the order which you would like them to appear. Click **Save** to save your changes.

You can still search for forms and documents, and even sort them by name as needed. Go back to the **Default** sort order to see the documents, forms, and folders in the order you set by using the organize button.



Files in zipForm® Plus that only have forms are stored for fourteen months after the last change or edit to the forms or file.

Once you have added documents (such as PDF documents) to a zipForm® file, the forms and documents will be stored online until the zipVault® expiration date (unless you delete the file). The **expiration date** is displayed inside the transaction file. Click the calendar button next to the expiration date in order to change the expiration date.

Your transaction files are considered **Active** files, unless you mark them as **Inactive** or **Closed**. All active files appear one your Transactions (Home) screen, the first screen you see when you sign in. You can search for other files, such as closed files, but they do not appear on your main transactions screen. To mark a file as closed (archiving it online until the expiration date), follow these steps:

Step One: Click the property photo to open the Transaction Details

Step Two: Change the Status from Active to Closed or Inactive

Step Three: Click Save

Now this file will appear online, but will not be on your main search for transactions. Search for **All** transactions, or search specifically for **Closed** or **Inactive** transactions to find a file with a status

other than Active.



Click the **Export** button to download a file or files.

Use **Export** on the main transactions page to export many files as .ZIP files.

Use the **Export** option within a file menu (clicking the arrow button [v] for that file) to select specific forms or documents to be included as part of the export.

Follow the download instructions to download a .ZIP file for your records.

Open the .ZIP file, and click **Extract** to extract the full file and file functionality.

Exported files can also be imported back into zipForm® Plus as needed.



Visit www.ziplogix.com for more details about zipForm® Plus and other zipLogix® products.

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