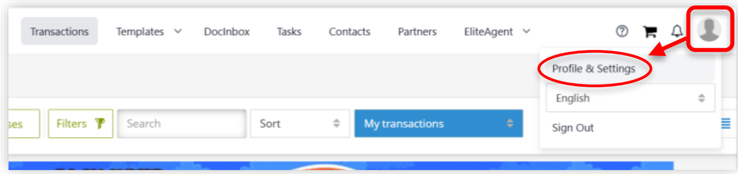
zipForm: Add an Assistant or TC to your zipForm Account

CALIFORNIA ASSOCIATION OF REALTORS®

You can add an Assistant or TC to work on your transactions in your zipForm account. Just assign the username and permissions and send the invitation. The Assistant/TC will create their own password and login with their own credentials. You have control over what the Assistant/TC can and can't do inside your account, and their access can be removed at any time.

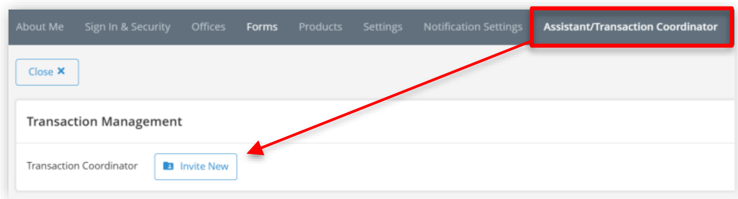
Assign Username, Permissions and Send the Invitation

1. In your zipForm account, click the photo in the top right corner and select **Profile & Settings** from the menu.



2. Click the **Assistant/Transaction Coordinator** tab in the gray navigation bar.

3. Click Invite New.



4. Complete the following fields:

- **First Name** *(required)*
- **Last Name** *(required)*
- **Username** = *(required)* this is commonly their email address.
- **Email Address** *(required)*
- **Phone** *(optional)*
- **Message** = *(optional)* type a message for the email invitation that the Assistant/TC receives.

Permissions

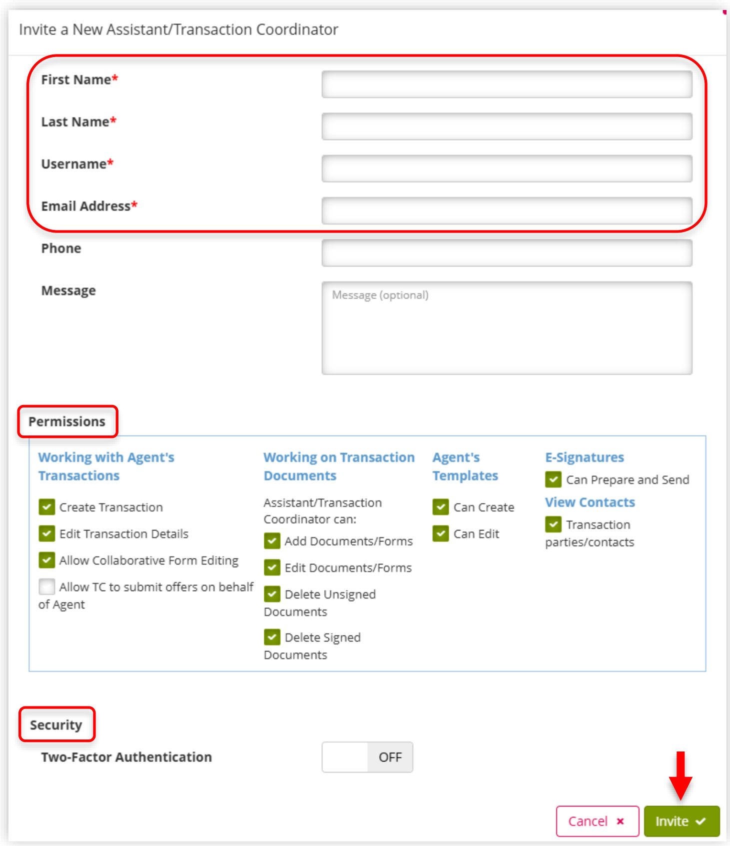
5. Check the boxes for the permissions you'd like the Assistant/TC to have. Uncheck the boxes for permissions you do not want them to have.

Some permissions are pre-selected by default, however, you can unselect those if desired.

Security

6. *(optional)* **Two-Factor Authentication** requires a unique code sent via email or text to the Assistant/TC each time they login.

7. Click Invite ✓ to send the invitation to the Assistant/TC.



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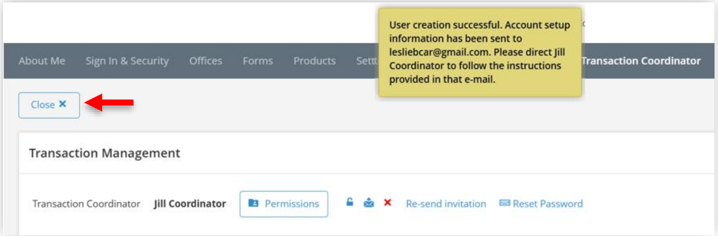
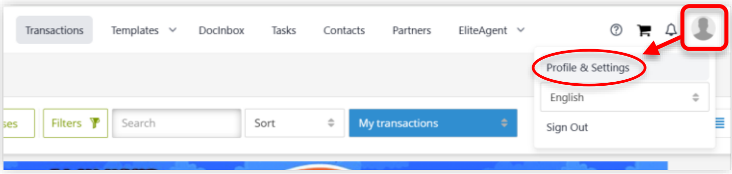
The system will display a notification that the account creation was successful.

8. Click [Close ✕] at the top left to close the **Profile & Settings** menu and return to your transactions.



Edit or Remove Assistant/TC Access

1. In your zipForm account, click the photo in the top right corner and select **Profile & Settings** from the menu.



2. Click the **Assistant/Transaction Coordinator** tab in the gray navigation bar.

3. Click to complete the following actions:

- [Permissions] = edit permissions, turn on/off Two-Factor Authentication
- [lock icon] = lock the account which disables the Assistant/TC login
- [email icon] = send an email to the Assistant/TC
- [✕] = delete the account
- [Re-send invitation] = automatically resend the account setup invitation
- [Reset Password] = automatically send a password reset link

4. When finished, click [Close ✕] at the top left to close the **Profile & Settings** menu.