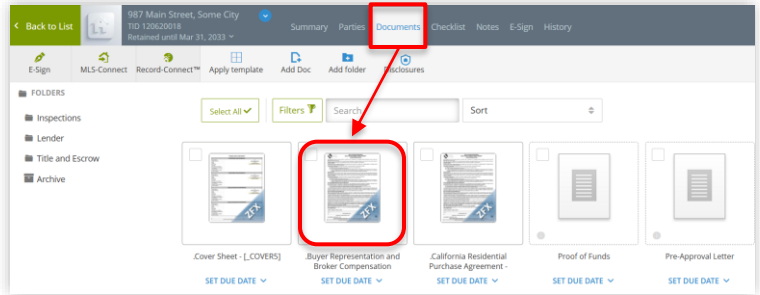


The Form Editor in zipForm is an all-inclusive Workspace to edit multiple forms at the same time, add forms from your form libraries, email documents from your transaction, download and print documents, start an E-Sign packet, and much more.

Using the Form Editor inside a Transaction

1. On the **Documents** tab inside your zipForm transaction, click on a document to open it in the Form Editor.



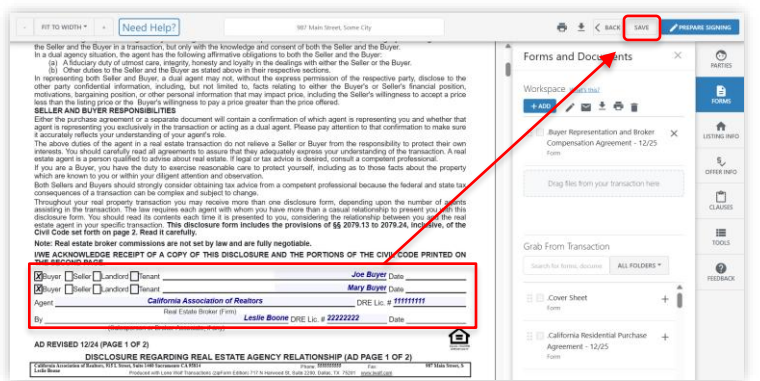
Add Data to Documents

The document is displayed on the left side of the screen, and the Workspace, tools, and other documents in your transaction display on the right.

1. Type to add data in the fields on the document.

2. Click **SAVE** at the top right to save your changes.

3. Click **BACK** at the top right to exit the form editor and return to your transaction.

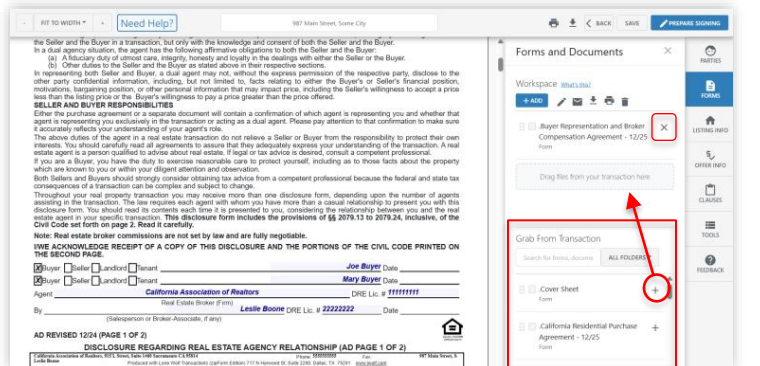


Edit Multiple Documents

Work on multiple documents at the same time by adding them to the Workspace.

1. Click **+** next to any document in the **Grab From Transaction** section to move it to the **Workspace** for any document or form you'd like to view or edit.

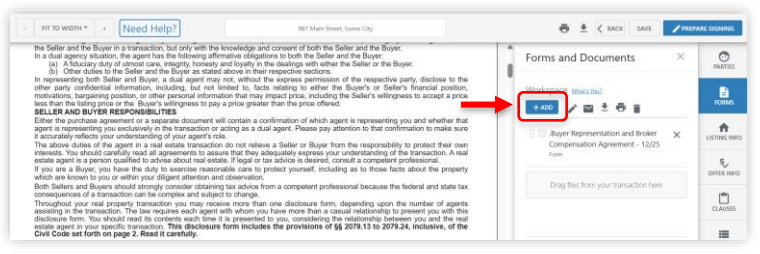
2. Click **X** to the right of any document in the **Workspace** to return it to the **Grab From Transaction** section.



Add New Forms

Add forms to your transaction from your form libraries or upload documents and images saved on your computer.

1. Click **+ ADD** in the **Workspace**.

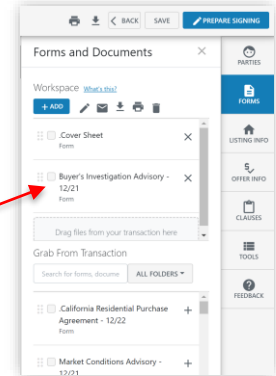
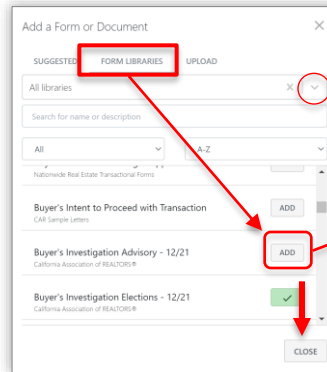


2. Click **Form Libraries** at the top of the popup window.

3. (optional) To switch libraries, click the dropdown arrow to the right of “All libraries” and select a library from the list. (Default is “All libraries”.)

4. Click **ADD** next to a form to add it to the **Workspace**.

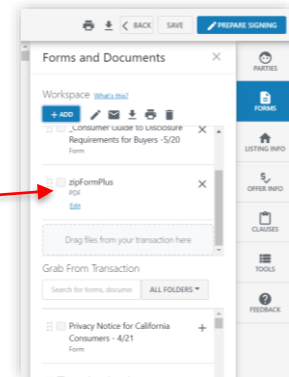
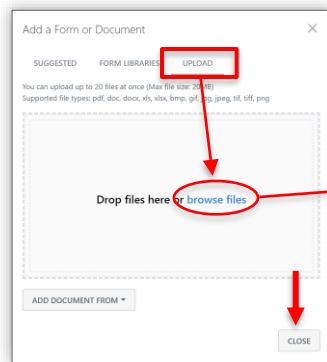
5. Click **CLOSE** to exit the window.



6. Click **Upload** at the top of the popup window to select a document or image saved on your computer.

7. Click **browse files** in the middle of the window and select a document or image saved on your computer to add it to the **Workspace**.

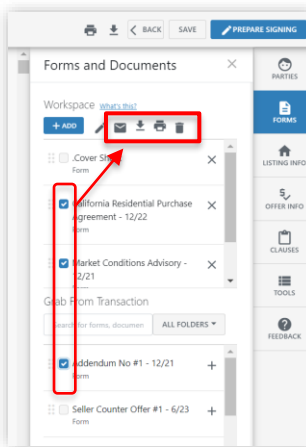
8. Click **CLOSE** to exit the window.



Email, Download, Print, Delete: **SELECTED FORMS**

1. Check the box next to the form(s) in the **Workspace** and/or **Grab from Transaction** sections to do the following functions:

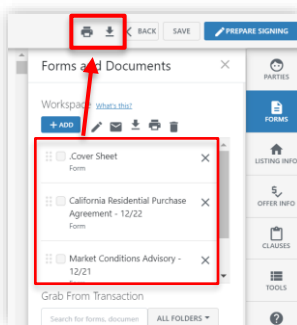
- = email selected documents in PDF format
- = download selected documents to your device in PDF format
- = print selected documents
- = delete selected documents from your transaction



Download and Print: **ALL FORMS**

1. The icons in the top taskbar take **all forms** in the **Workspace** and do the following functions:

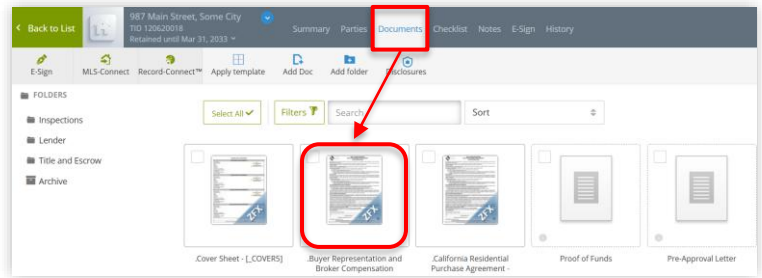
- = print all documents
- = download all documents to your device in PDF format



Create Signing Packets from the Form Editor


There are two ways to start a signing packet inside the Form Editor: 1) the pen icon in the Workspace for *selected documents*, or 2) the “Prepare Signing” button for *all documents* in the **Workspace**.

1. On the **Documents** tab inside your zipForm transaction, click on a document to open it in the Form Editor.

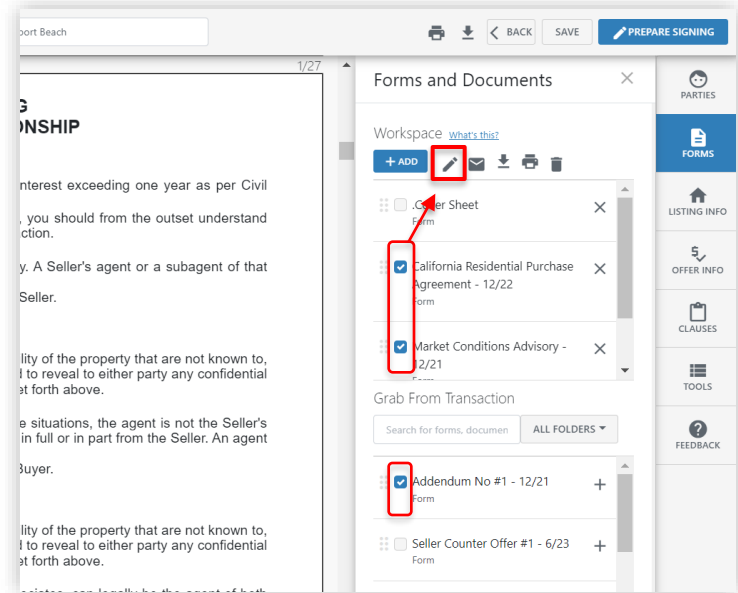


Selected Documents


1. Check the box next to the form(s) in the **Workspace** and/or **Grab from Transaction** sections that you'd like to send for signature.

2. Click  in the **Workspace** to start the E-sign process for the selected documents.

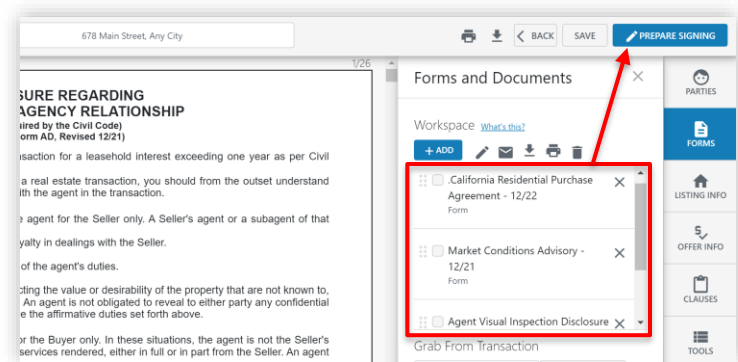
The **Pen** icon is programmed to take only the selected documents in both the **Workspace** and the **Grab from Transaction** sections and put them into a signing packet. On the next screens, you can add or remove documents, rearrange the order of the documents, and upload files saved on your device, if needed.



All Documents in the Workspace

1. Click  to start the E-Sign process for *all documents* in the **Workspace**.

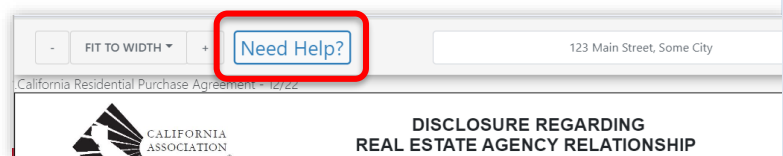
The **Prepare Signing** button is programmed to take *all documents* in the **Workspace** and put them into a signing packet. On the next screens, you can add or remove documents, rearrange the order of the documents, and upload files saved on your device, if needed.



Need Help?

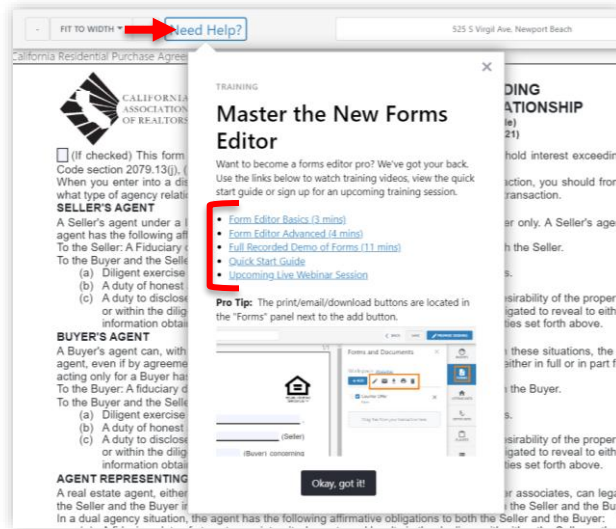
Inside the Form Editor

1. Inside the Form Editor, click  on the top left side.



2. View Lone Wolf videos and step-by-step guide:

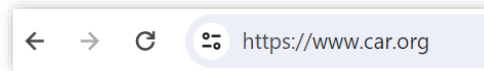
- [Form Editor Basics \(3 mins\)](#)
- [Form Editor Advanced \(4 mins\)](#)
- [Full Recorded Demo of Forms \(11 mins\)](#)
- [Quick Start Guide](#)



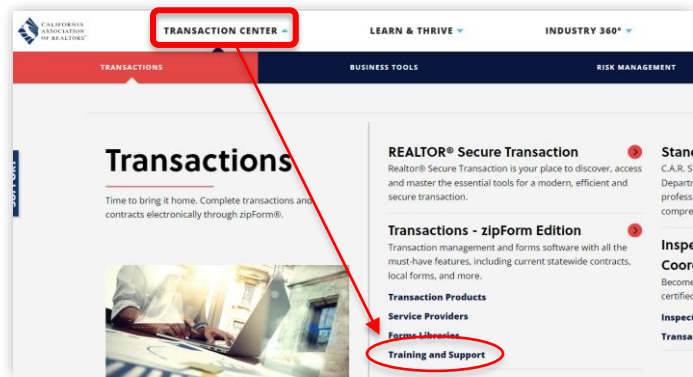
On the C.A.R. Website

View training guides, videos, and past webinar recordings.

1. Open a browser and go to www.car.org.



2. Click **Transaction Center** at the top left, then click **Training and Support** in the “Transactions – zipForm Edition” section in the middle of the page.



3. Click **FREE Training** to register for upcoming webinars and view past webinar recordings.

4. Click one of the tiles below or scroll down the page to view **zipTips videos** on our YouTube playlist, **zipForm FAQs**, guides and videos on the **Form Editor** functions and features, **zipCommunity**, digital signatures, **zipForm Mobile**, and more!

