zipCommunity™: Help At-a-Glance for Agents

CALIFORNIA ASSOCIATION OF REALTORS®

Secure Document Sharing

zipCommunity™ is an online platform that allows agents to collaborate with clients and other agents on transactions in their zipForm account. The most common use of zipCommunity™ is for client-fillable forms such as the TDS and SPQ, to name a few. This guide details the steps for agents to share documents, view completed documents and send the completed forms for signature.

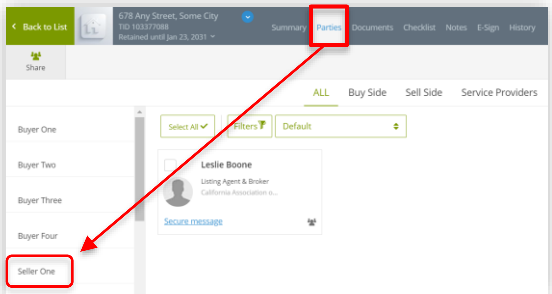
Share documents from your zipForm transaction (Agent)

Add Transaction Party

First, you'll add the Party to your transaction.

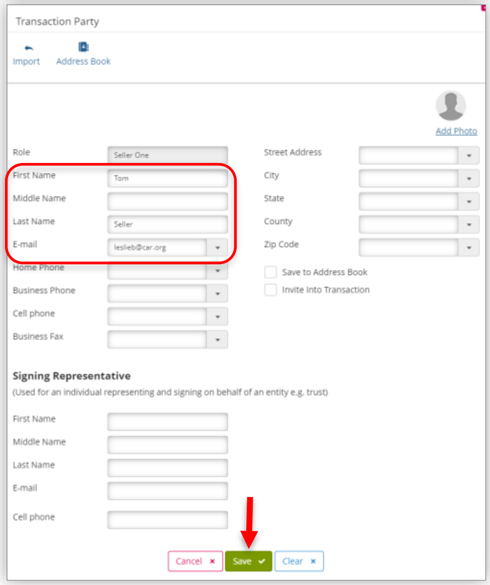
1. Inside your zipForm transaction, click the **Parties** tab in the gray navigation bar at the top of the page.

2. In the left navigation menu, click the **Role** of the person who you'd like to share documents with.



3. Type the party's **First Name**, **Last Name**, and **E-mail** address in the top section.

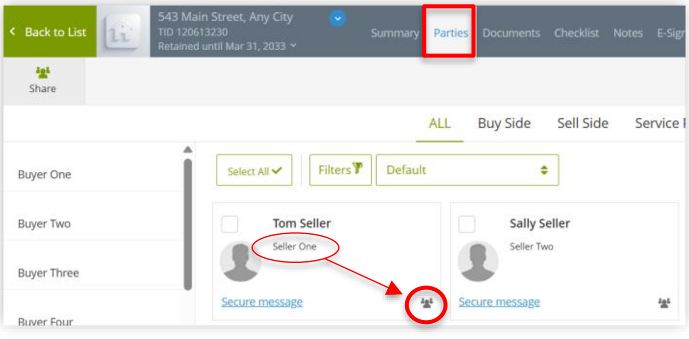
4. Click Save at the bottom of the window to save your changes.



Start Share and Assign Permissions

5. On the **Parties tab**, click the share icon at the bottom right of the tile of the party you want to share with.

IMPORTANT: Confirm which party can edit the form – open the form in the form editor and click on any section highlighted in pink, then view the notification at the bottom right of the screen that displays the party who can edit the fields on the form. For example, seller forms display "Editable by Seller One", which means you would share the form with Seller One in your transaction.

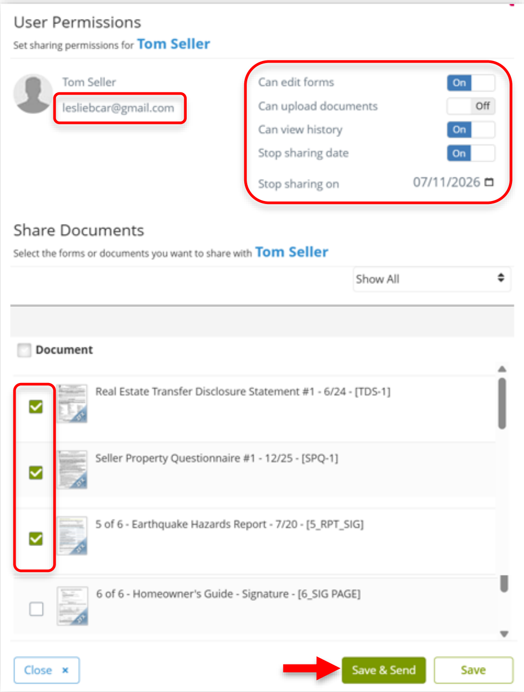


6. Assign the **User Permissions** for the recipient:

- **Edit the user's email address**, if needed.
- **Can edit forms** = turn this ON if you'd like your recipient to add data to or edit forms *(setting is OFF by default)*
- **Can upload documents** = *(optional)* turn this ON if you'd like your recipient to upload documents directly into your zipForm transaction *(setting is OFF by default)*
- **Can view history** = *(recommended)* turn this ON if you'd like your recipient to view the History log of their progress *(setting is OFF by default)*
- **Stop sharing date** = leave this ON *(setting is ON by default)*
- **Stop sharing on** = this date is pre-set for 30 days from today. To select a different date, click on the date to open the calendar *(setting is ON by default)*

7. Check the box(es) next to each form you'd like to share with the recipient.

8. Click Save & Send at the bottom of the window to continue.

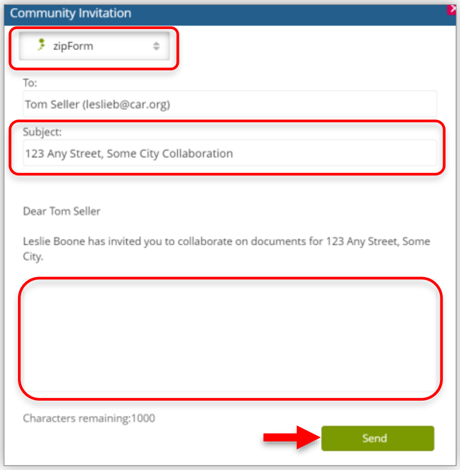


Send Collaboration Invitation

9. On the next window, complete the following:

- **Email Account** = always select "zipForm" from the dropdown menu
- **Subject** = *(recommended)* edit the subject line of the email to include the names of the forms you are sharing
- **Message** = *(recommended)* type a message to the recipient

10. Click Send to send the collaboration invitation to the recipient.



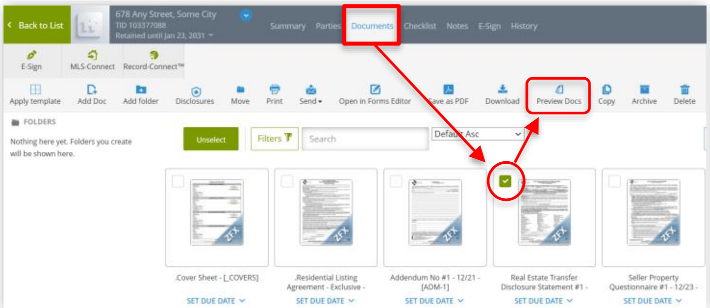
Preview Completed Forms (Agent)

After the recipient completes the form(s), the Agent can view the recipient's answers inside their zipForm transaction.

1. Open your zipForm transaction and click the **Documents** tab in the gray navigation bar at the top of the page.

2. Check the box on the form(s) you'd like to preview.

3. Click **Preview Docs** in the top toolbar to open the form as a PDF.



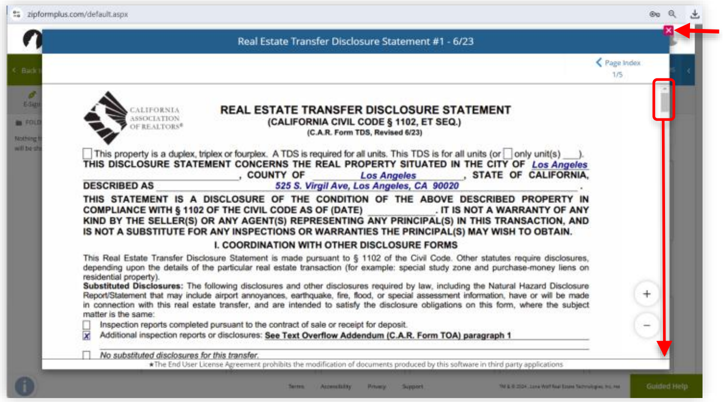
The document will display as a PDF inside your zipForm transaction.

4. Use the scroll bar on the right side to move through the document and read the client's answers, including any text answers that may be on a Text Overflow Addendum.

5. When finished viewing, click the **X** in the top right corner of the window to close the document and return to your transaction.

6. Repeat the above steps for each form you'd like to preview or simply select multiple forms before clicking "Preview Docs".

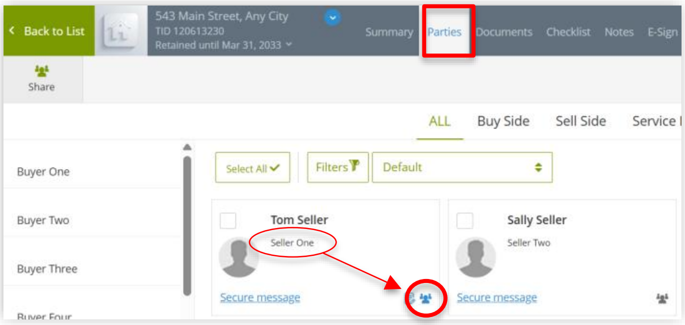
IMPORTANT: Be sure you are *not* viewing the forms in the form editor at the same time the client is filling out the forms as the client's answers will not save.



Stop Sharing, Save as PDF, and Send Documents for Signature (Agent)

<u>Stop Sharing</u>

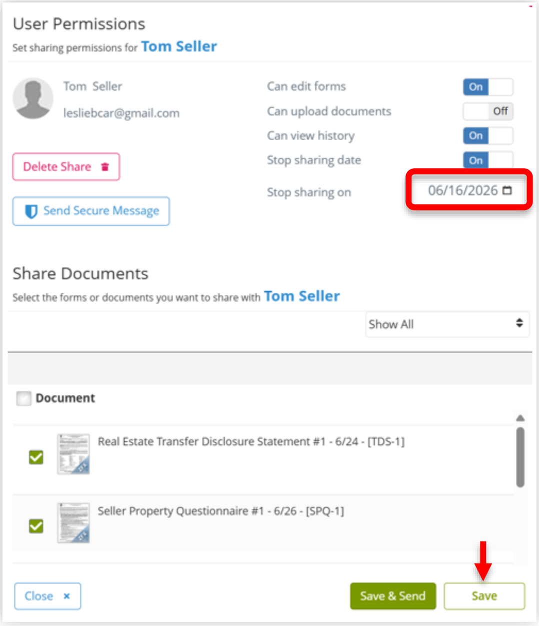
1. On the **Parties tab** in your transaction, click at the bottom right of the tile of the party you are sharing with.



2. Click the date for **Stop sharing on** and change it to today's date.

3. Scroll down and click Save at the bottom of the window to save your changes and return to the **Parties tab** in your transaction.

This step prevents the recipient from making further changes to the completed forms.



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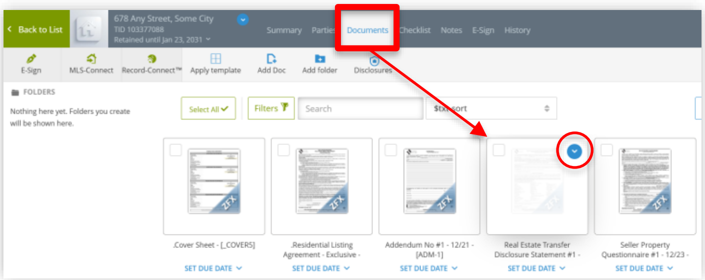
Save as PDF

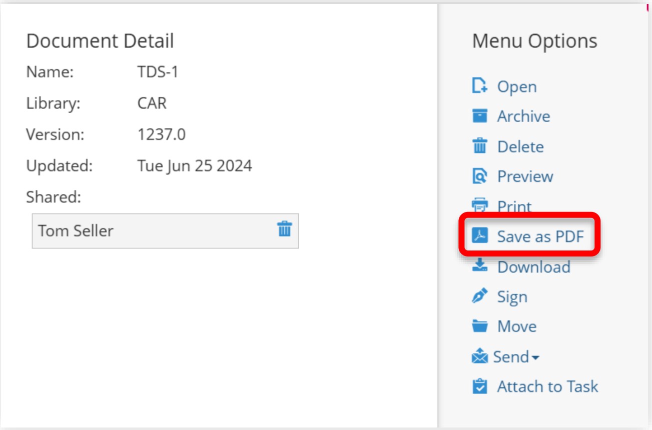
It's important to save the completed form(s) as a PDF before sending it for signing to ensure there are no further changes to the form.

1. Inside your transaction, click the **Documents** tab in the gray navigation bar at the top.

2. Hover your mouse over a form that was completed in zipCommunity and click the blue dropdown arrow to open the **More Actions** menu.

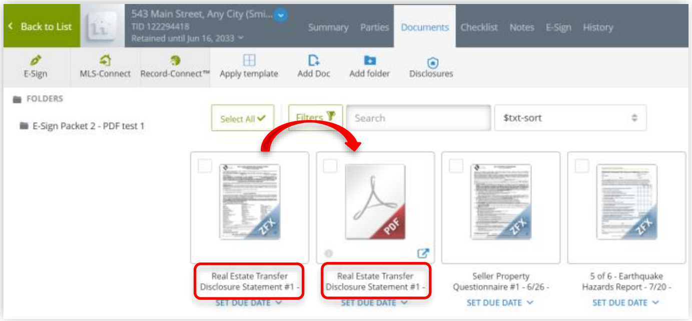


3. Select **Save as PDF** from the menu.



The system will create a PDF version of the form which displays directly next to the original form.

4. Repeat the above steps for each form completed in zipCommunity that you'd like to send for signature.



Send for Signature

1. In the **Documents** tab in your transaction, check the box on each PDF you'd like to send for signature.

2. Click **E-Sign** in the top toolbar to start a signing packet with the selected forms.