zipForm® 6 Broker Guide

by zipLogix

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Welcome to your zipForm® 6 Professional Administrator Account!

zipForm® 6 Professional offers many powerful tools to allow administrators to customize their accounts. Administrative features may be accessed at any time by clicking on the Agent List and Office List tabs located in the Home main tab.

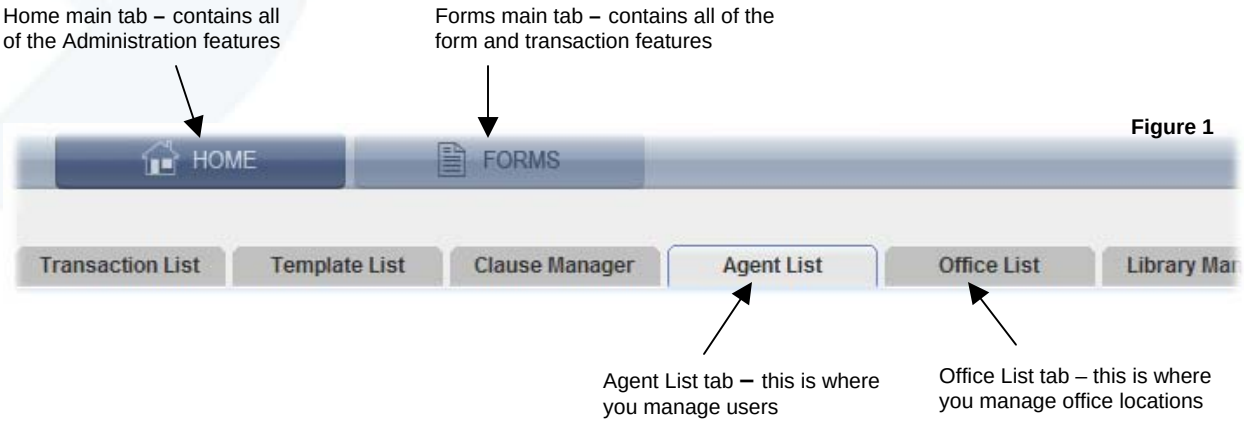


Figure 1

Office List Tab

Not every brokerage will require multiple offices. If you will use multiple offices in your brokerage account, it is important to set them up *before* you create users. The reason is that you will be required to associate your users with an office when they are created.

All zipForm® 6 Professional brokerage accounts will have at least one office – this being the Corporate Office that is created by zipLogix to open your account.

If you intend that all of your agents will operate out of a single office, you can attach all of your users to the Corporate Office, and you will not need to create additional offices. If this is the case you can skip ahead to the *"Users – Agent List"* section below starting on page 7.

Adding Offices (Figures 2 and 3)

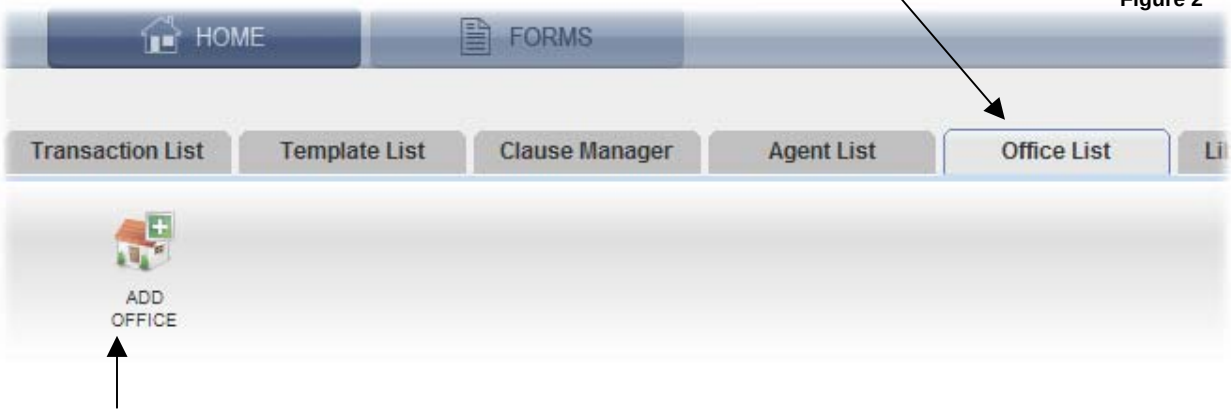
If you are going to use multiple offices to manage your users, it is important to add these offices before adding users.

To add an office to your zipForm® 6 Professional account you must have available seats. "Seats" is a term used to describe the number of users that can be attached to the brokerage account – one office, one seat.

When all of the seats are "filled", the Broker Administrator cannot add more offices until some offices are removed. You may purchase additional office seats if necessary by calling 866-627-4729.

Step 1: To add an office to your brokerage account, click on the Office List tab.

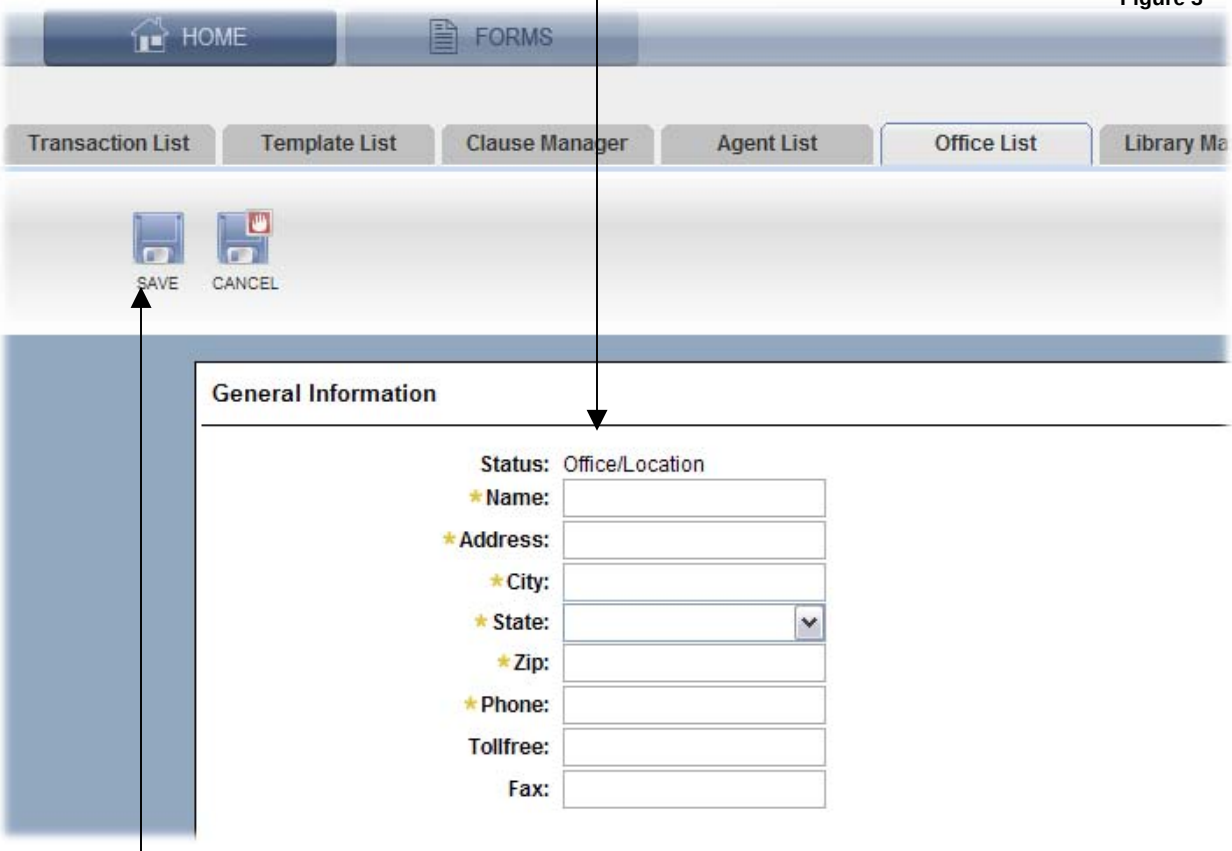
Figure 2



Step 2: On the Office List tab, click on the Add Office button.

Step 3: On the General Information page you will be able to fill in information about the office: name, address, city, state, zip, phone, toll free phone and fax.

Figure 3



Step 4: Click on the Save button to store the new office or click on the Cancel button to return to the Office List page without saving anything.

Finding an Office (Figure 4)

When you log into zipForm® 6 Professional as an administrator, you are placed in the Agent List tab by default. However, you can access your Office List by clicking on the Office List tab.

Offices may be found by their name, address, agent's username or status using the Advanced Search. Most, if not all offices will be "Office/Location" status.

Find a specific office by filling in some criteria in one or more of the fields provided. You can use the Reset button to reset the filters to their default state.

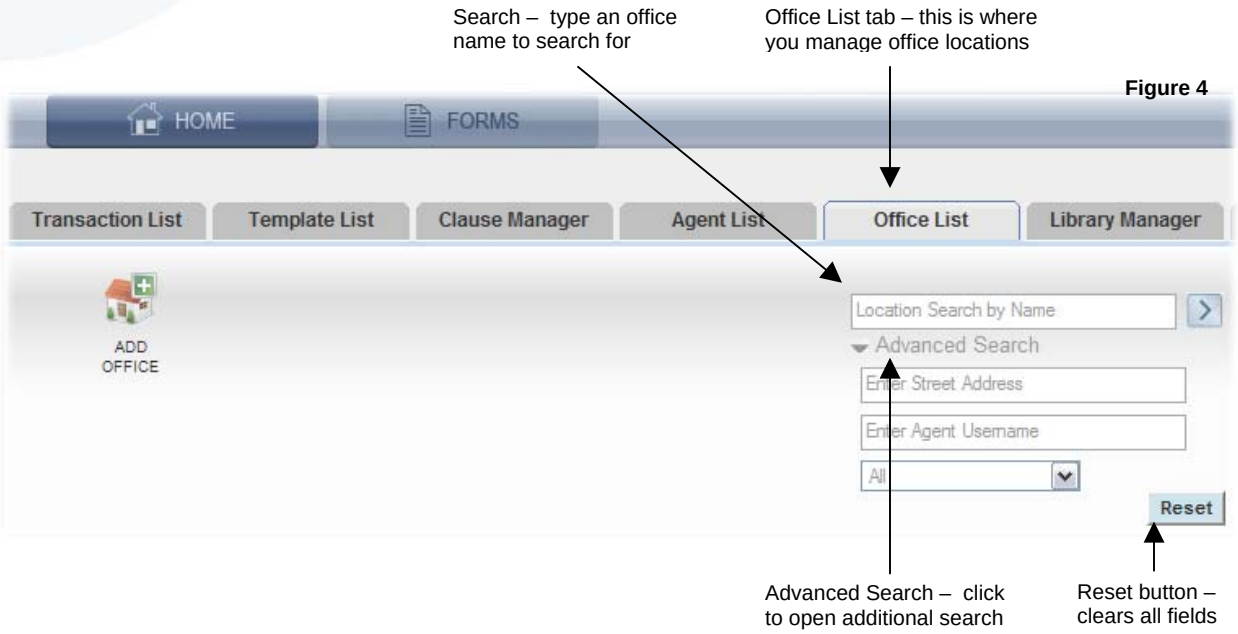


Figure 4

Working with Office Actions (Figure 5)

On the Office List tab, you can choose an action to operate on a specified office. To the left of each office on the list is a drop-down arrow. Move your mouse pointer over these drop-down arrows, next to the office you wish to perform an action on.

View	Opens the View Office page. You can view the office information, but you cannot edit it. Click OK to return to the Office List tab.
Edit	Opens the Edit Office page. You can edit any of the office information. Click the Save button to make the change or click Cancel to return to the Office List rejecting all changes.
Delete	Opens the Delete Office page. You can view the office information and delete the office if desired. Click the Delete button to remove the office or click Cancel to return to the Office List without deleting anything.

Changing Office Information (Figure 5)

As a Broker Administrator you can use the Office List tab to find the offices linked with your brokerage account. By choosing the Edit action, you can change any of the office information including the name.

The changes made will only take effect on new transactions. Existing transactions will print the office information that the user was assigned to at the time that the transaction was created.

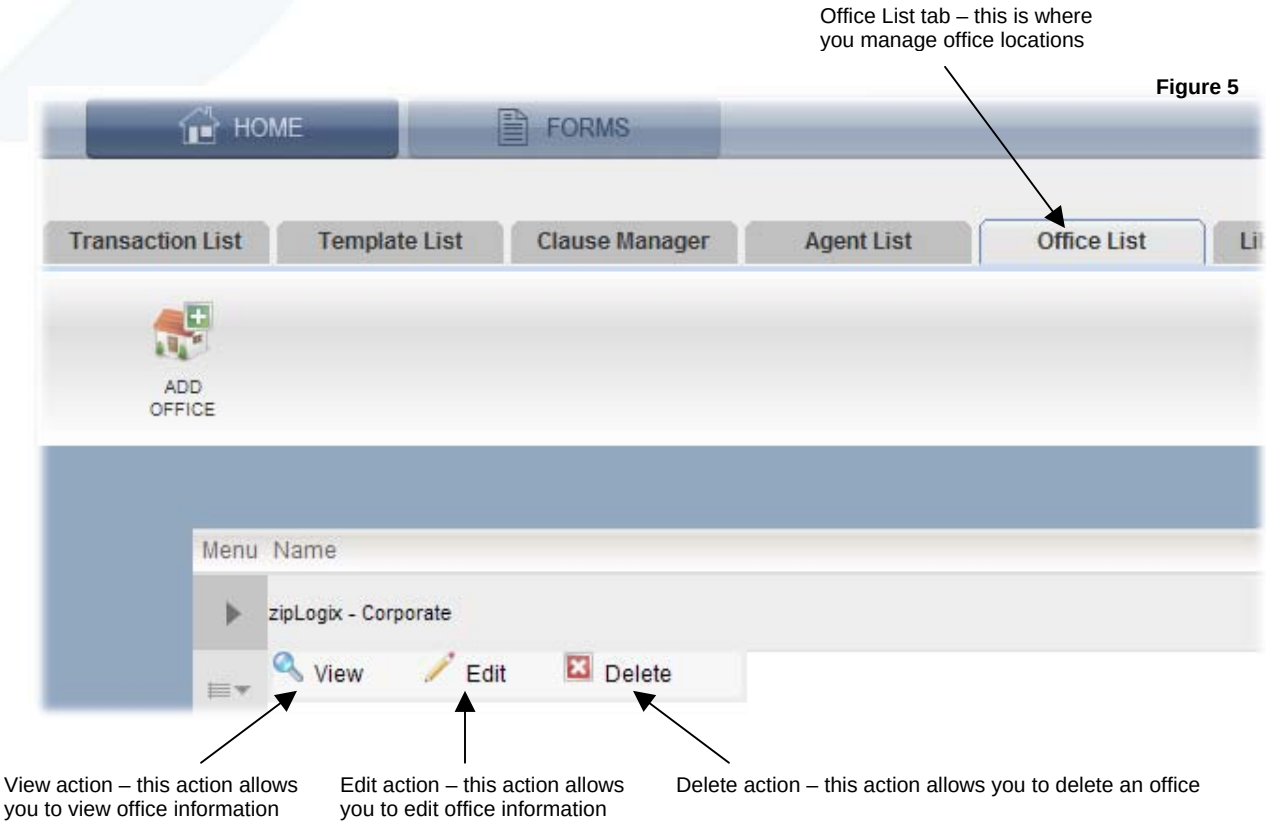


Figure 5

Users – Agent List Tab

On the Agent List page, an Office Administrator will see all agents who are associated only with the Corporate Office, and all agents associated with their office. A Broker Administrator will see all agents regardless of office.

User Roles

- **Broker Administrators** – A zipForm® 6 Professional brokerage account consists of some number of users and – optionally – offices with a Broker Administrator managing them. The Broker Administrator is responsible for managing users, offices, templates and clauses. The Broker Administrator also has the ability to generate reports on users, view user transactions and reassign them to other users.
- **Office/Location Administrators** – In large brokerages, it may not be practical to have only one administrator managing the account, so the brokerage account can be subdivided into Offices. Each Office will have its own Office/Location Administrator who has the ability to manage users, templates and clauses within their office. Each office may have multiple Office/Location Administrators; also one Office/Location Administrator may manage more than one office. Office/Location Administrators only have the ability to manage users and templates that are in the offices to which they are assigned. Only the Broker Administrator has the capability to manage all users, templates and clauses within all offices.
- **Agents** – Agents are not administrators, however, they do have some control over their own accounts and transactions.

Adding Users (Figure 6 and 7)

To add users to your zipForm® 6 Professional account you must have available seats. “Seats” is a term used to describe the number of users that can be attached to the brokerage account – one user, one seat.

When all of the seats are “filled”, the Broker Administrator cannot add more users until some users are removed. You may purchase additional seats if necessary by calling 866-627-4729.

At least one administrator must always be associated with an office. A user may be an administrator in multiple offices, and an office may have multiple administrators.

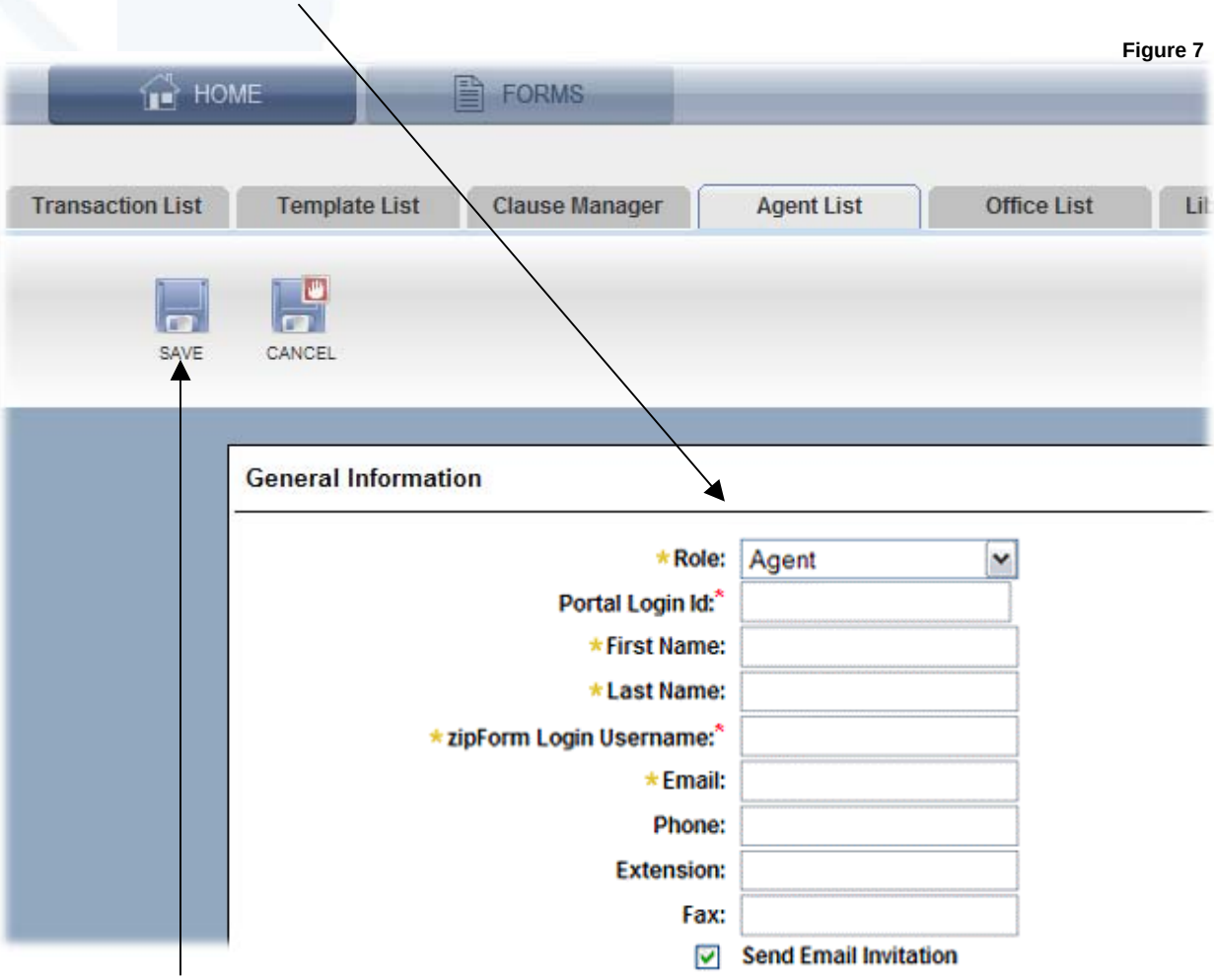
Step 1: To add a user to your brokerage account, click on the Agent List tab.

Figure 6

Step 2: On the Agent List tab, click on the Add Agent button.

Step 3: On the General Information page you will be able to fill in information about the user: role, first name, last name, email address, zipForm login username, phone, extension, fax, which office they are a part of, which form libraries the user will be assigned, and whether or not you wish to send the user an email invitation. The Portal Login Id field should be left blank unless your account belongs to a specific portal.

Figure 7



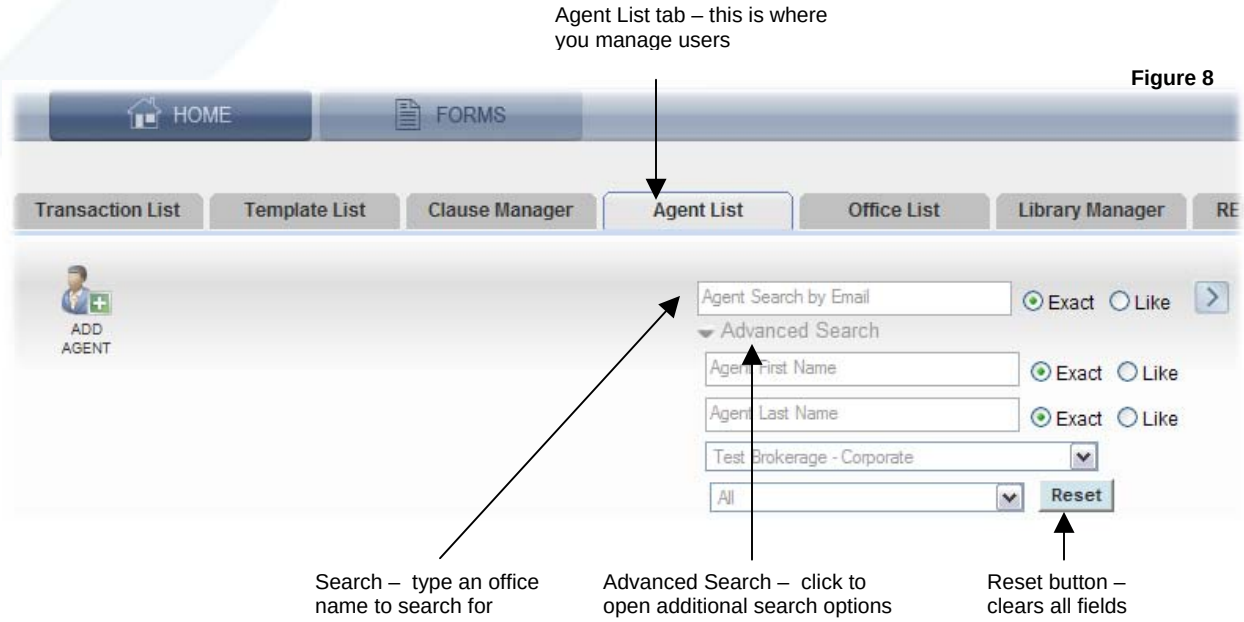
Step 4: Click on the Save button to store the new user or click on the Cancel button to return to the Agent List page without saving anything. When a new user is added, the password is blank by default. The new user must log in with the username that you created for them, leave the password field blank, and click on the “Sign In” button. They will then be prompted to create a password for their account.

Finding Users (Figure 8)

Agents may be found by their email address, first name, last name, office or status using the Advanced Search. Find a specific agent by filling in some criteria in one or more of the fields provided. You can use the Reset button to reset the filters to their default state.

Each user is color-coded to match the role that each user fulfills. A Broker Administrator is shown in pink, an Office Administrator is shown in blue and all other users are shown in green.

Figure 8



Working with Agent Actions (Figure 9)

On the Agent List tab, you can choose an action to operate on a specified agent. To the left of each agent on the list is a drop-down arrow. Move your mouse pointer over these drop-down arrows, next to the agent you wish to perform an action on.

Whenever you delete a user, please be aware that all transactions in the user's account are reassigned to the Broker Administrator. User transactions are not automatically deleted when the user account is removed. The Broker Administrator will find these transactions on their transaction list where the transactions can be deleted or reassigned to another user. A good rule to follow before you delete a user is to first inspect the user's account and take a look at the transactions (if any). Delete or reassign these transactions before you delete the user's account.

View	Opens the View Agent page. You can view the agent's information, but you cannot edit it. Click OK to return to the Agent List tab.
Edit	Opens the Edit Agent page. You can edit the agent's information. Click the Save button to make the change or click Cancel to return to the Agent List rejecting all changes.
Reset Password	Resets the password for the selected agent.
Delete	Opens the Delete Agent page. You can view the agent's information and delete the agent if desired. Click the Delete button to remove the agent or click Cancel to return to the Agent List without deleting anything.
Transactions	This action is available to the Broker and Office Administrators. For the agent selected, this action opens the agent's list of transactions where they may be opened and inspected.

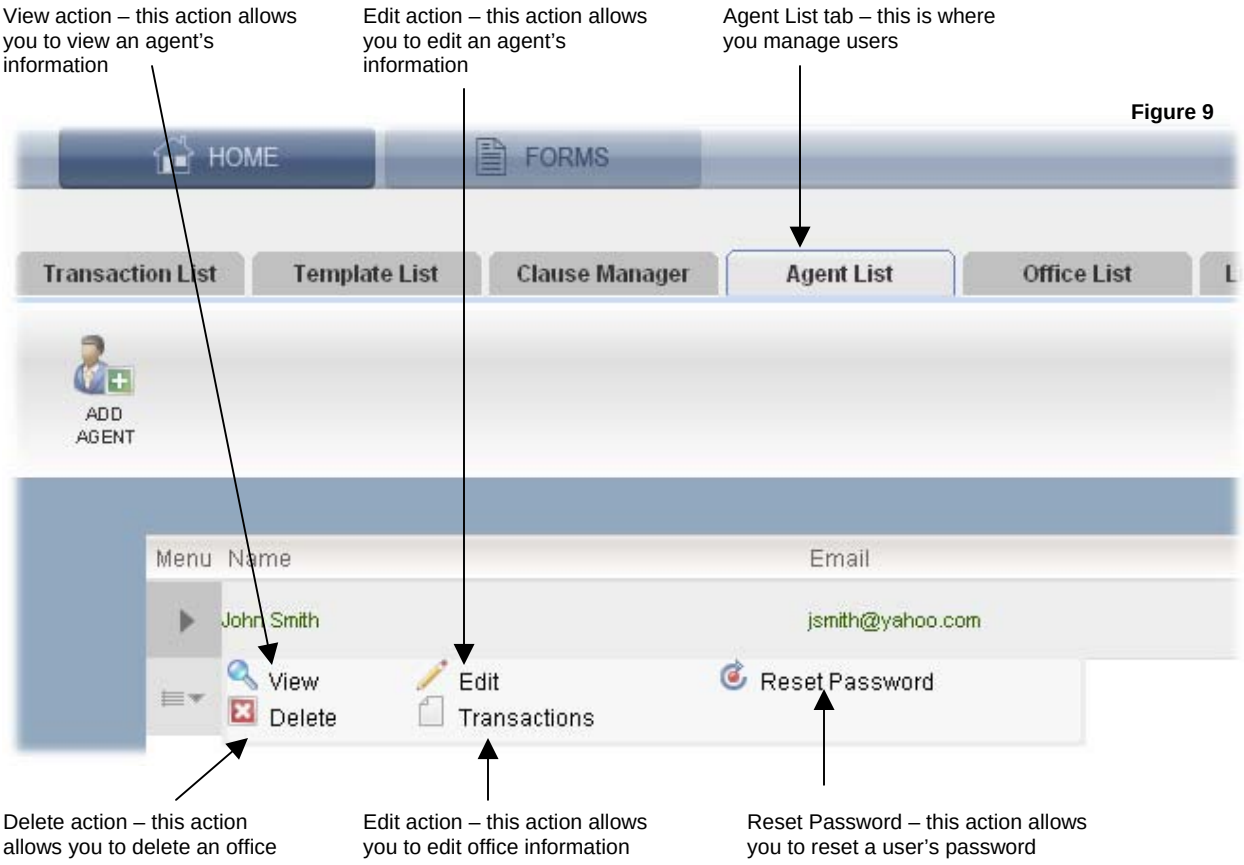


Figure 9

Reassigning Transactions (Figures 10, 11, and 12)

One of the important capabilities of the administrator is to reassign transactions.

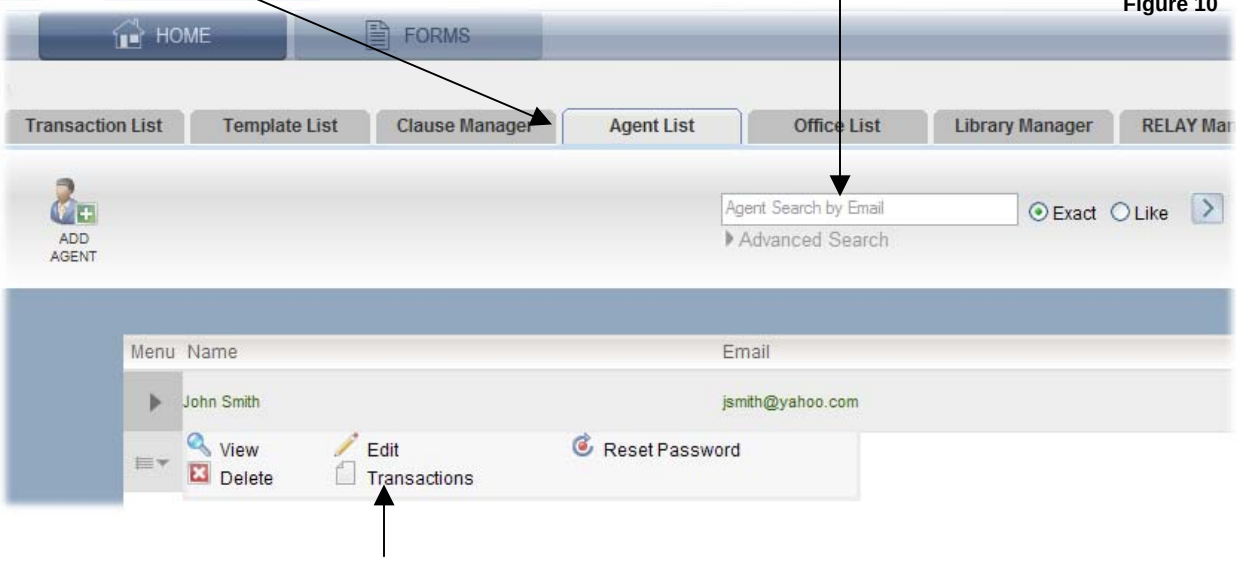
For example, when an agent is removed (deleted) from zipForm® 6 Professional, all of the agent's transactions are automatically reassigned to the Broker Administrator. A good rule to follow before you delete a user is to first inspect the user's account and take a look at the transactions (if any). Delete or reassign these transactions before you delete the user's account.

Other reasons to reassign transactions may be an agent on leave or disability, or maybe a transaction or referral coordinator will take over the process.

Step 1: To reassign a user's transaction to another user, click on the Agent tab.

Step 2: Search for the user whose transactions you wish to reassign.

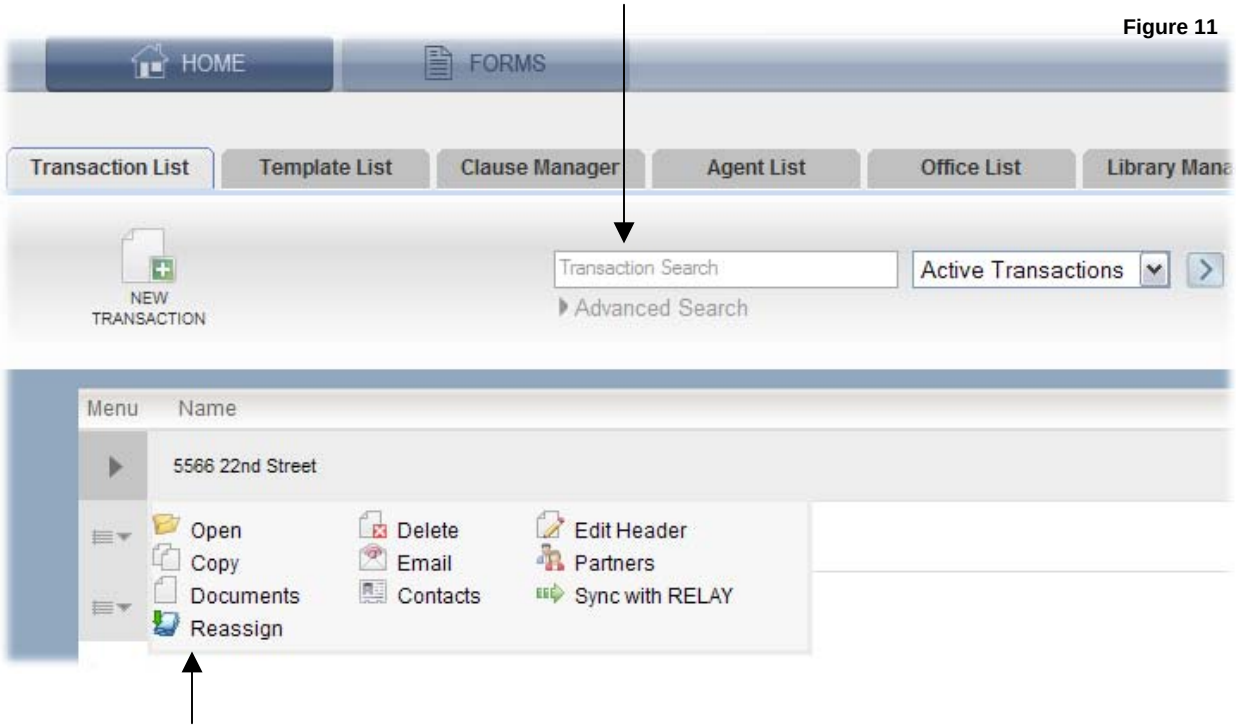
Figure 10



Step 3: Use the Transactions action by clicking on the drop down arrow next to the user whose transactions you wish to reassign.

Step 4: You will now be placed in the user's transaction list that you selected in Step 3. Search for the transaction that you wish to reassign.

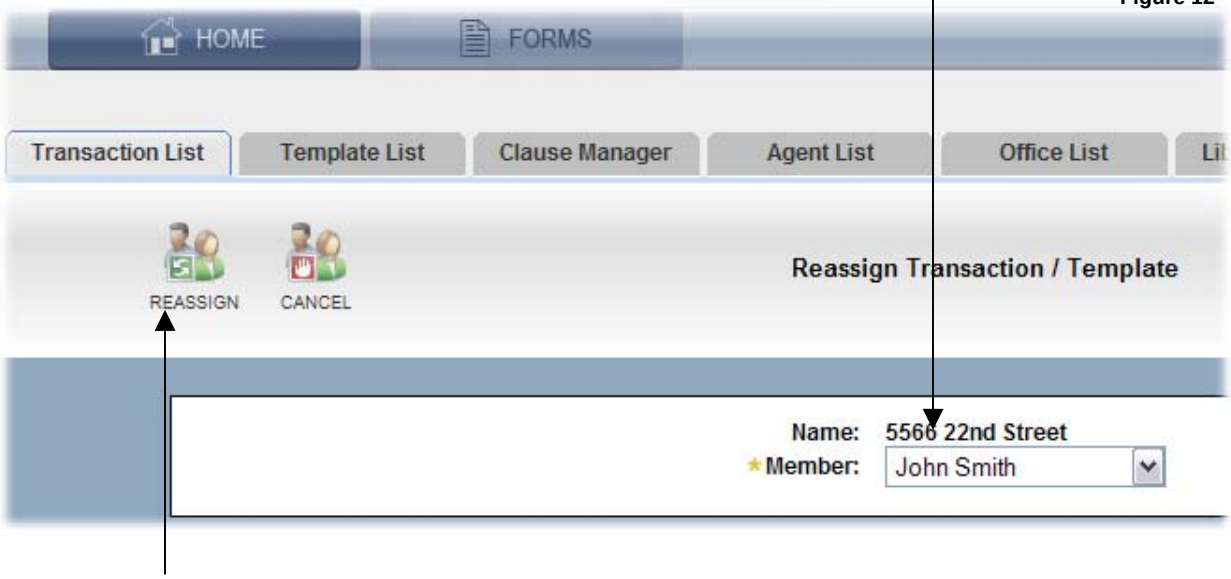
Figure 11



Step 5: Use the Reassign action by clicking on the drop down arrow next to the transaction you wish to reassign.

Step 6: Select the user you wish to reassign the transaction to.

Figure 12



Step 7: Click on the Reassign button to reassign the transaction to the selected user, or click on the Cancel button to return to the user's transaction list.

Moving Agents Between Offices (Figures 13 and 14)

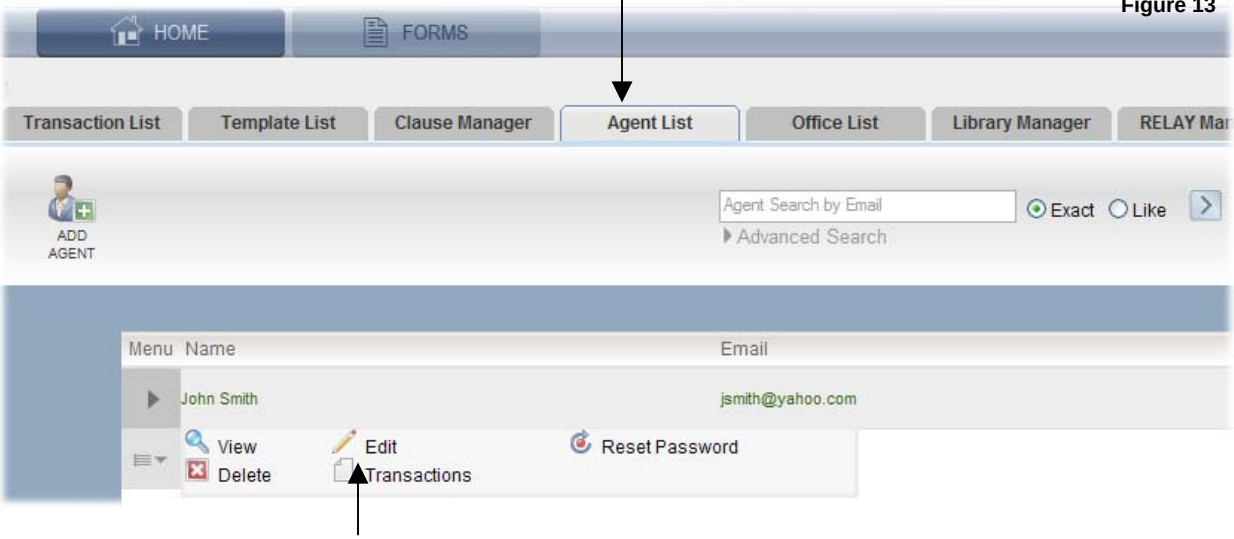
It is possible to move users from one office to another with the same Broker account. You cannot move an agent from a separate account into your account.

When a Broker Administrator logs in, the Agent List is the default view where they can see all of the users in the brokerage and all of the offices. The Agent List is also the default view of an Office Administrator.

However, an Office Administrator can see users assigned solely to the Corporate Office *in addition to* users assigned to the office.

Step 1: To move a user into an office, click on the Agent tab.

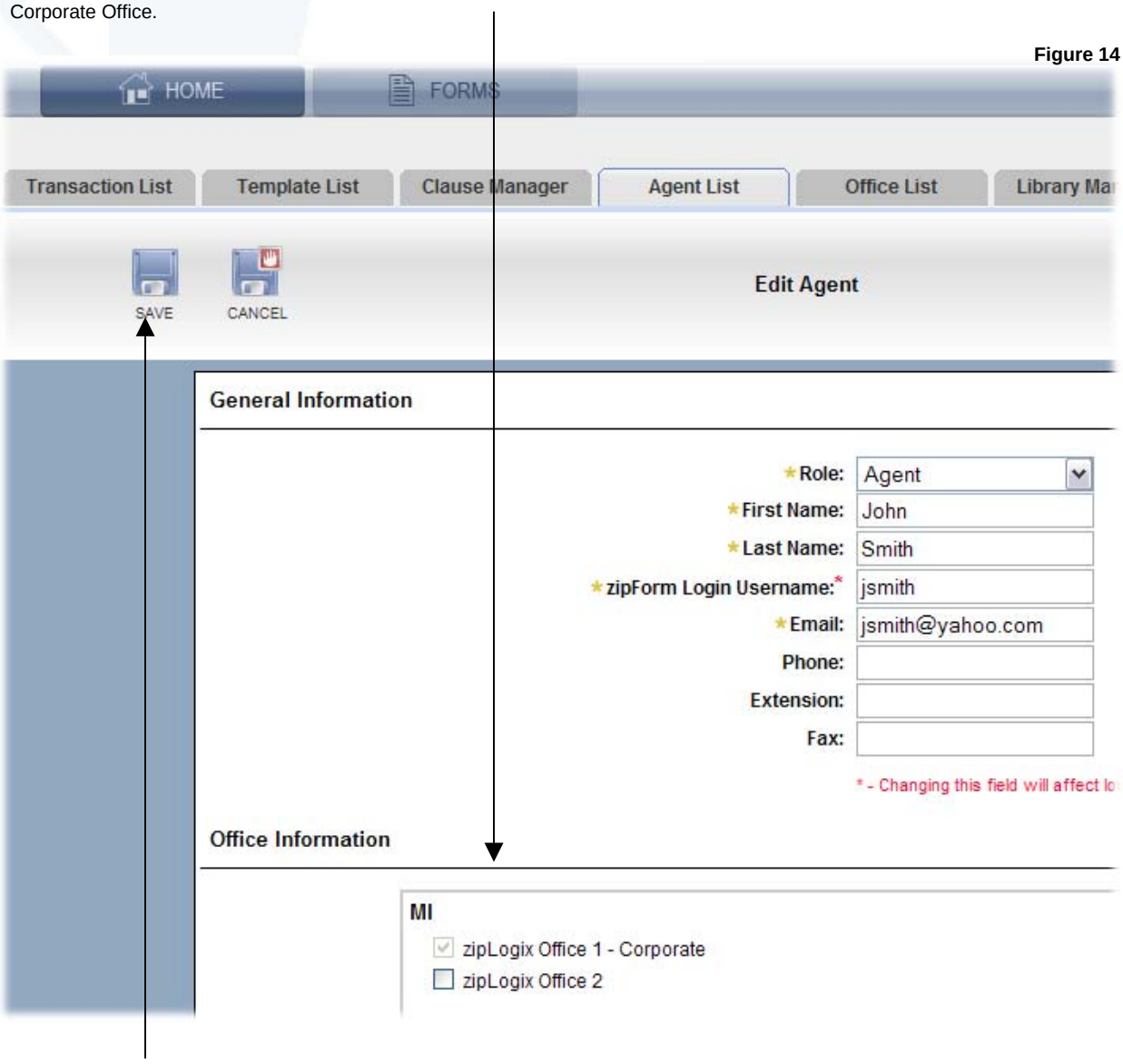
Figure 13



Step 2: Use the Edit action by clicking on the drop down arrow next to the user you wish to move.

Step 3: Under *"Office Information"* you will see a list of the offices available. Simply place a check next to the office you wish to assign the user to, or uncheck the box if you wish to remove the user from that office. You cannot remove the check from the Corporate Office.

Figure 14



Step 4: Click on the Save button to save your changes, or click on the Cancel button to return to the Agent List tab.

Managing Passwords (Figures 15, 16, and 17)

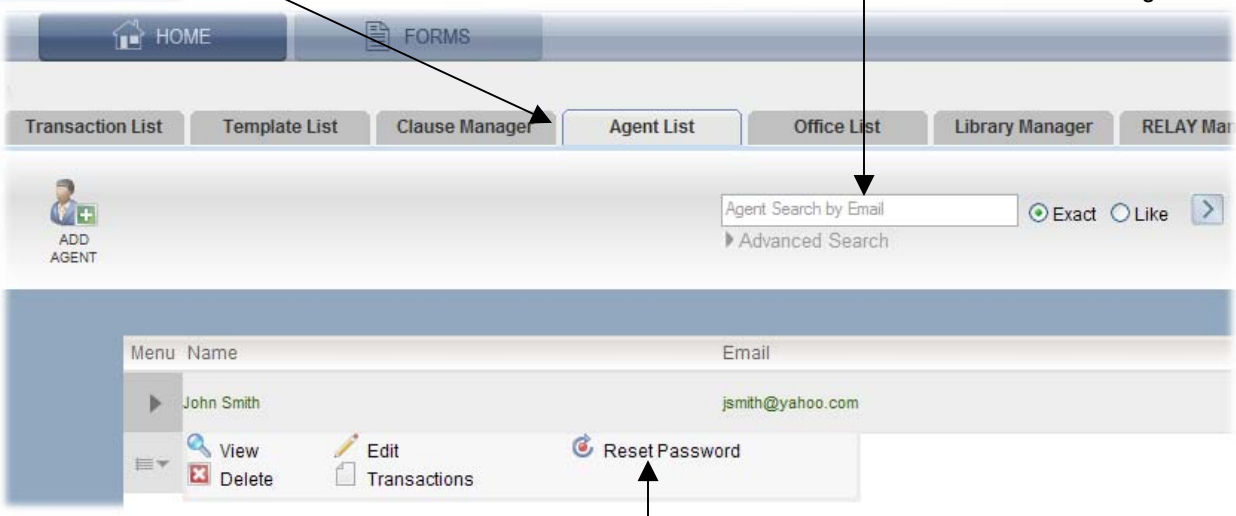
In addition to the *"Send Invitation Email"* message received by a newly set up user, there are other ways to manage passwords. The Reset Password action is found in the Agent List tab.

This action is used to reset a user's password. Once the password has been reset, the user will be sent an email to the email address on the account. This email will contain a link. When the link is clicked, the user will be prompted to create a new password.

Step 1: To reset a user's password, click on the Agent tab.

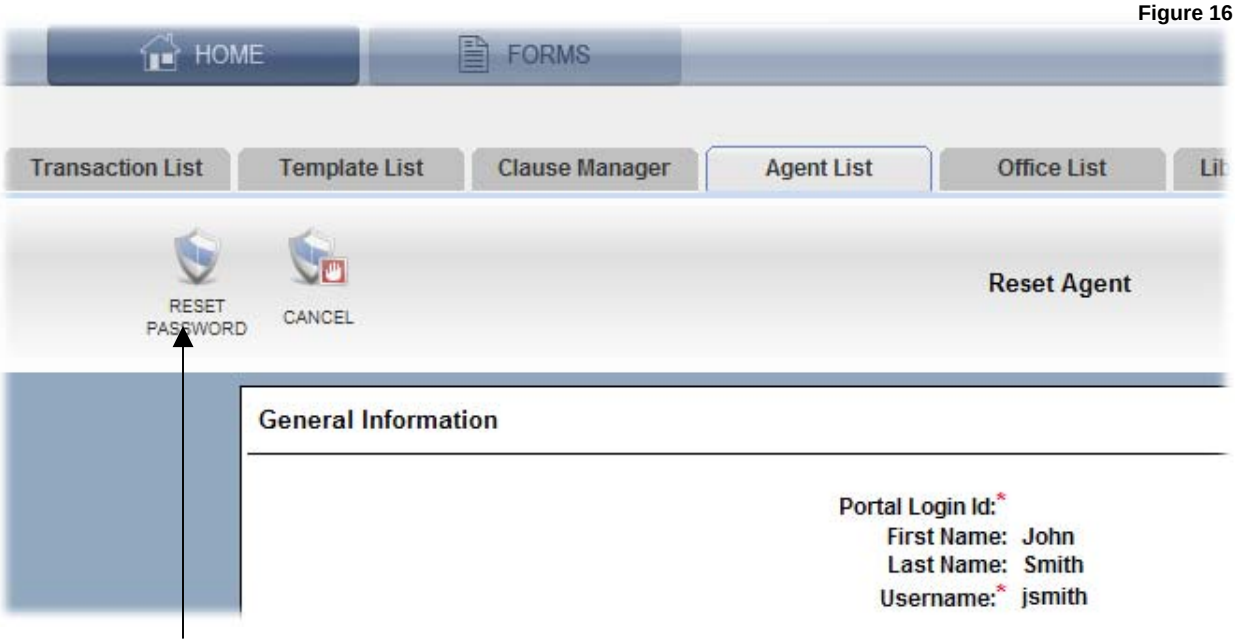
Step 2: Search for the user whose password you wish to reset.

Figure 15



Step 3: Use the Reset Password action by clicking on the drop down arrow next to the user whose password you wish to reset.

Figure 16



Step 4: Click on the Reset Password button to reset the user's password, or click on the Cancel button to return to the Agent List tab without resetting a password.

The user can also reset the password themselves by clicking on the *"Forgot Password"* link on the zipForm® 6 Professional log in page. The user will receive an email at the email address on the user account. This email will contain a link to the Set Password page.

Figure 17

Click on the Forgot Password link to reset your password.

Templates

A template is a group of forms that you frequently use for your transactions. This packet of forms can have non-specific transaction data stored within the template. As an example, you can create a template that contains the forms required for a listing, your company and your agent information.

Once you have created a template you can either start a transaction using the template or apply a template to one of your existing transactions.

Creating Templates (Figures 18 and 19)

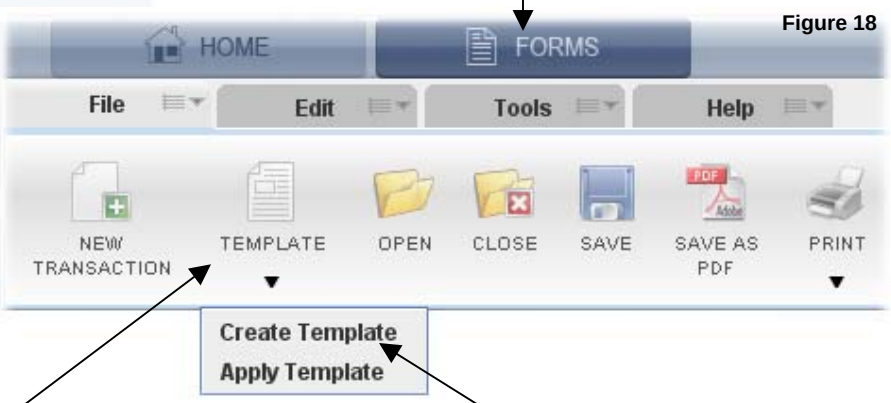
Templates may be created at the global, office or agent level.

The three template statuses are:

- **Global Template** – A Global Template is a template that all users will see and be able to use. Only a Broker Administrator can create this level of template.
- **Location/Office Template** – A Location or Office Template is a template that only users from a certain office will see and be able to use. An Office Administrator or Broker Administrator can create this level of template.
- **Agent Template** – An Agent Template is a template that only the agent that created it can see and use. All users (including administrators) may create and use their own templates at this level.

Step 1: Click on the Forms main tab to get access to the form and transaction options.

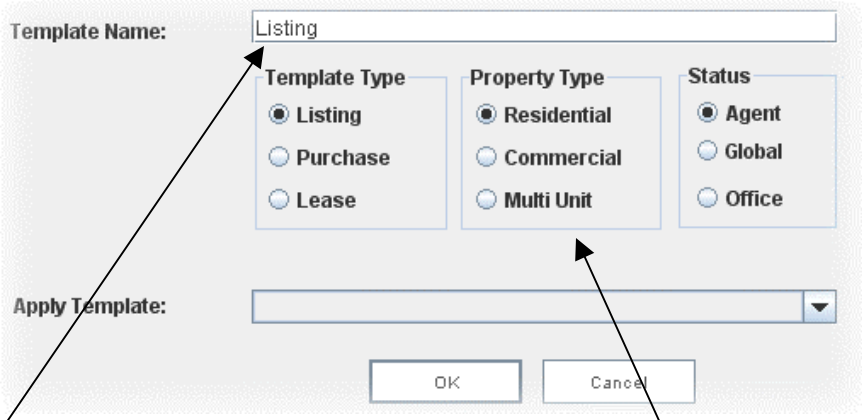
Figure 18



Step 2: Click on the Template button in the File tab.

Step 3: When the drop down menu appears, click on Create Template.

Figure 19



Step 4: Enter a name for the Template.

Step 5: Select the Template, Property type, and Status.

Clause Editor

By using the Clause Editor, an administrator may create and store "*Office*" or "*Broker*" clauses. Agents cannot create or edit clauses at these levels but they can apply them. Office clauses are available only to users assigned to a specific Office. Broker clauses, on the other hand, are available to all users in the organization.

Managing Clauses (Figures 20, 21 and 22)

In the Clause Editor you can manage clauses using the following general procedure:

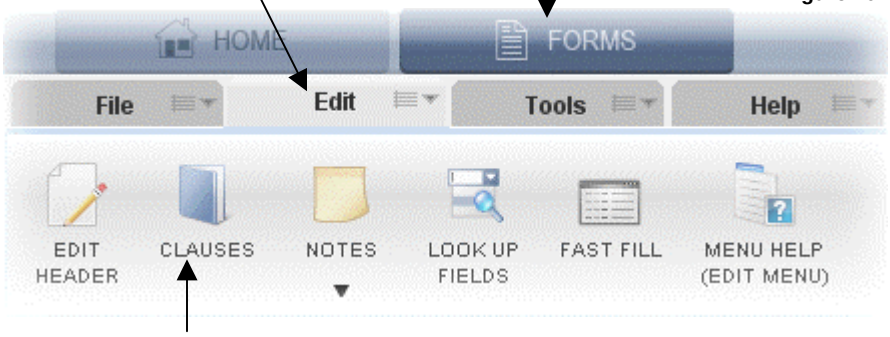
Choose the level you want to work with:

- **Broker** – An Office Administrator and Broker Administrator can both create Broker clauses.
- **Office** – When using the Office level, you must choose an Office. An Office Administrator can choose the Corporate Office and the Office with which they are associated. A Broker Administrator can choose from all Offices.
- **Agent** – All users (including administrators) may create and use their own clauses at the Agent level. Only the individual agent can access and use Agent clauses.

Step 1: Click on the Forms main tab to get access to the form and transaction options.

Step 2: Click on the Edit tab.

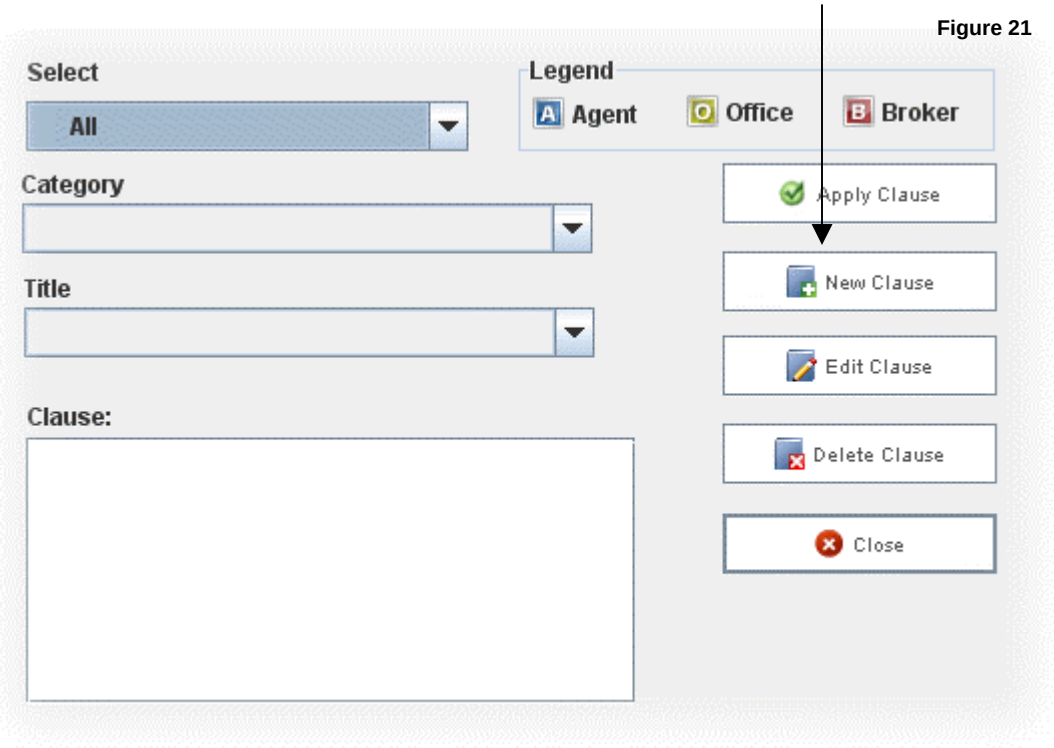
Figure 20



Step 3: Click on the Clauses button in the Edit tab.

Step 4: Click on the New Clause button.

Figure 21



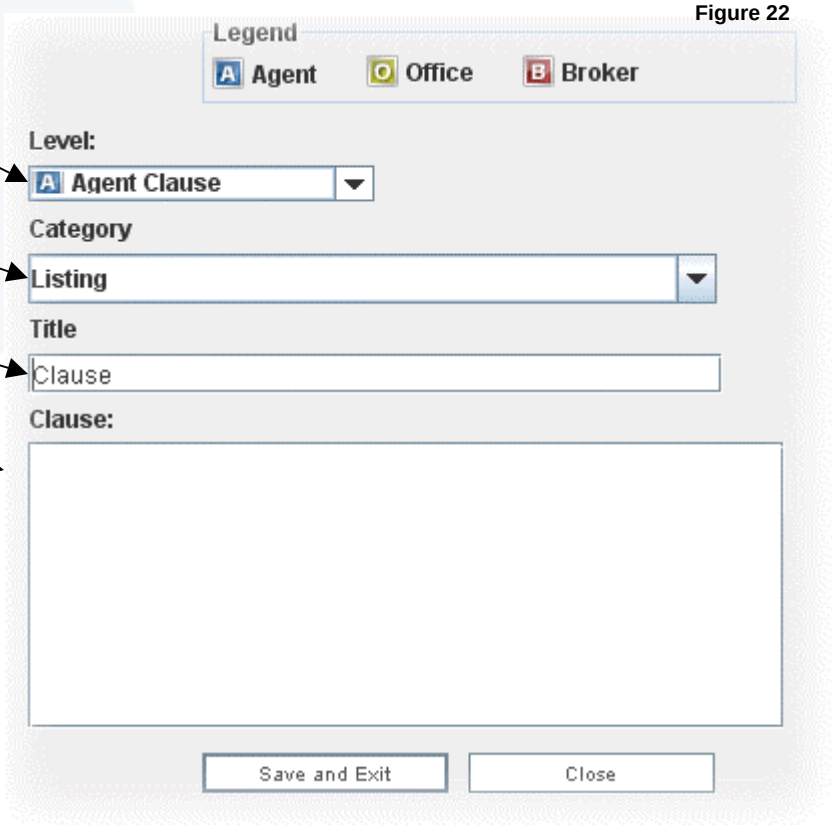
Step 5: Select the Clause Level described above.

Step 6: Select an existing Category or create a new one.

Step 7: Type in the Title for the Clause.

Step 8: Type in the text for the Clause.

Figure 22



Reports

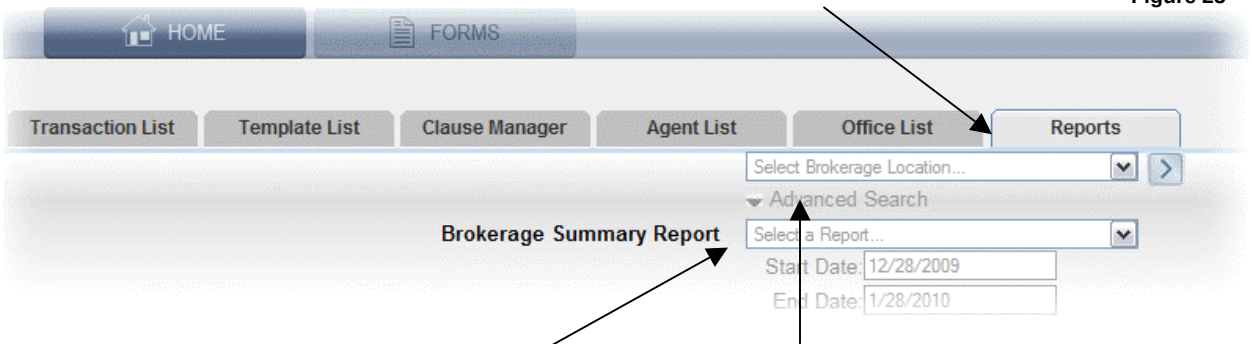
There are reporting tools available for Broker Administrators. Currently the reports that are available are: Seats By Library, Transactions By Location, Transactions By User and Users Transactions By Location.

Running Reports (Figure 23)

To access reports, click on the Reports tab within the Home main tab of zipForm® 6 Professional.

Step 1: Click on the Reports tab.

Figure 23



Step 2: Click on the drop down menu labeled "Select a Report" to choose the type of report you would like to run.

Step 3: You can click on the "Advanced Search" link to run a report based on start and end dates and Locations/Offices.

Product Support Information

Product support is available from our Help Desk only to registered zipForm® 6 users between the hours of 8:00 a.m. and 8:00 p.m. Eastern Time Monday through Friday.

HelpDesk:
http://support.ziplogix.com
Fax Number :: 586-790-7582

Sales:
Email :: sales@ziplogix.com
Fax Number :: 586-790-7582

Mailing Address:
zipLogix
18070 15 Mile Road
Fraser, MI 48026

zipForm Internet Site:
www.ziplogix.com

www.ziplogix.com

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