



1. Why should I create an Enforced Template?

As a Broker Administrator, you may decide to create an Enforced Template when you have certain documents or forms that you want your agents to consistently include when creating specific transaction types.

2. Can agents modify an Enforced Template?

An Enforced Template will allow edits and deletions if the Broker has the Compliance Options turned to YES. However, having the Compliance Options turned to NO will ensure agents are in Compliance when using an Enforced Template.

3. What is Placeholder automation?

To turn on placeholder automation, go to your broker settings->automation tab. Once placeholder automation is enabled, agents that fill a placeholder will automatically see that document was flagged/sent for review by their administrator.

4. Can I see everything in my agents' accounts?

Absolutely! As a Broker Admin, you have been granted special access to view all of the accounts under your Multi-User Account. This granted access allows you the capability to monitor and manage the activities of your agents and allows for more transparency in your day-to-day work.

5. What is an Auto Applied template?

When selected, this time saving feature is automatically applied to specified transactions based on transaction and property types.

6. Can documents/files be uploaded while in zipCommunity[™]?

Absolutely! In addition, based on the user permissions set by the Agent for the sharing party, he/she may be able to upload as well.

7. Is there a way to bring tasks from other calendars into the zipForm[®] Plus platform?

Yes! When you sign into another Cloud Calendar (Google, Microsoft, et cetera), it will allow you to sync those tasks into your zipForm[®] Plus Account, giving you total access to all of your calendars from one easy to use platform.

8. What's the significance of the number on the bell located in the top right corner of the page?

This icon represents notifications for the user and as the Broker, you are able to see task details (approval, e-sign, zipCommunity[™] status, et cetera).

9. What's the purpose of re-assigning a transaction?

As a Broker, if you have an agent out of the office for an extended period of time, you may consider re-assigning their transactions to other agents so that transaction management does not stop.