



## zipTMS® Transaction Management: Soar to the Next Level (Phase 1; Session 2)

### 1. How do you delete a transaction in zipForm® Plus?

Although deleting a transaction is possible in the zipForm® Plus platform, the information within that transaction will no longer be available to you once you do so. Instead, you might consider “Export to Archive” in your menu options, which will remove it from your transaction view, but enable you to retrieve it at a later date, if necessary.

### 2. What is a Template?

Templates are time-saving files within zipForm® Plus, which allow to add a standard set of pre-filled forms, documents, folders, and even tasks/checklists. This data may then be repurposed and applied to specific, selected transaction types.

### 3. I am a Broker Administrator with a multi-user account. Can I create templates for my agents to use?

Absolutely! If you require your agents to use templates you create, you may create “Enforced” templates, and elect for them to be auto-applied for all agents working under your account.

### 4. What is the difference between Tasks and Checklists?

Tasks, located on your zipForm® Plus Navigation Bar, gives you an overview of all items pending completion. The information under “Tasks” encompasses all of your active Transactions. The “Checklist” tab, on the other hand, is Transaction-specific.

### 5. Can you adjust due dates for items in a Transaction?

Yes! Under the “Checklist” tab, click to open the task for which you wish to adjust due dates. Once open, adjust and then click “Save.”

### 6. Why isn't my Agent Dashboard reflecting any changes when I update the status of a Transaction? Help!

Although you have adjusted the status of a Transaction, you must also ensure that certain fields are populated on your Transaction Summary screen (e.g. Closing Date, Listing Expiration Date, Purchase Price, et cetera).

### 7. Why is the information I entered into my Template not showing up on my forms?

Go into your profile and click “Settings.” Scroll down to “General Options,” and check the box for “Use Template Data.” After you save these changes, your information should begin populating your forms.

### 8. Why am I unable to see notifications when sign in to my zipForm® Plus account?

Your notifications must be turned on under “Notifications” in your zipForm® Plus Profile Settings.

Phase 1.2 Rev. 03-28-2018