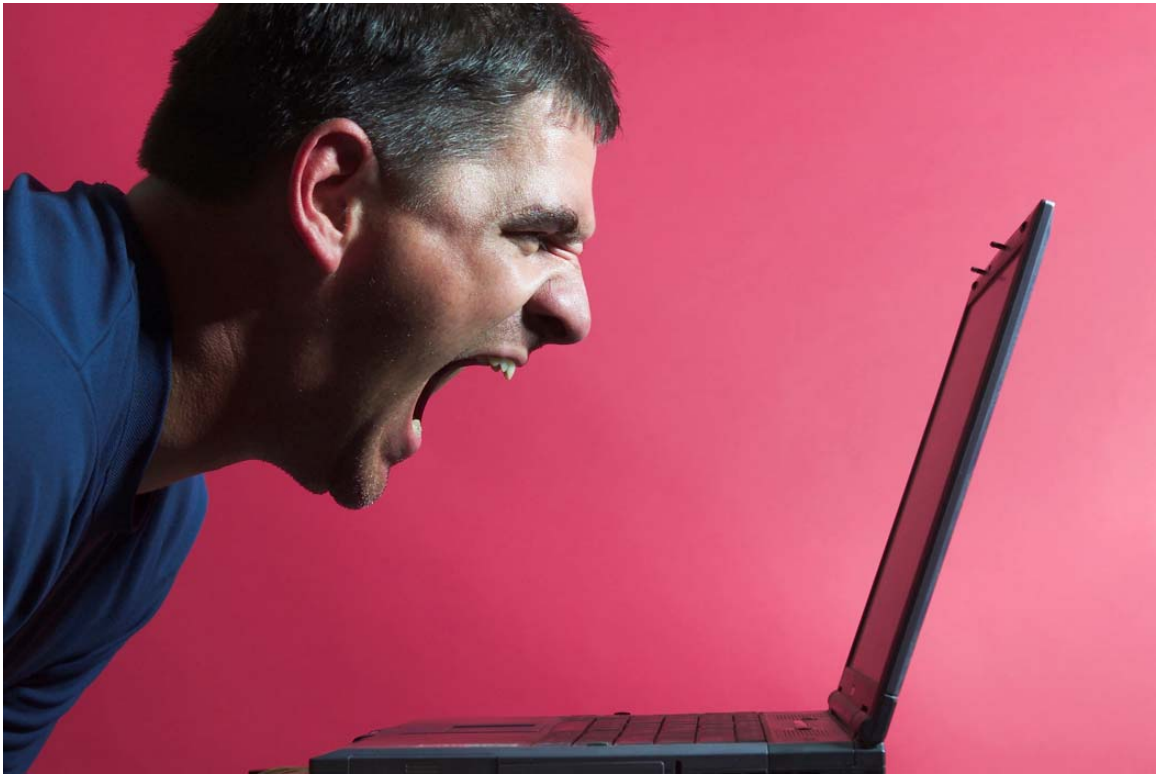


ARIZONA ASSOCIATION OF REALTORS®

ZIPFORM® ONLINE USER'S GUIDE



Start reading here and we'll get you there!

Downloading ZipForm Online:

- Go to www.aaronline.com
- Click the ZipForms in the grey bar (top of page)
- Enter in your email and password then click submit (if you do not know your email address and password please call 602-248-7787)
- Click **Register for online**
- Select your local association and click "Proceed with Your Online registration."
- On the registration form enter your email address and a password and confirm your password (your password must be 6-10 characters.) Confirm all information is correct and click Next
- On the order summary click CHECK OUT NOW (located on the right side of the screen)
- On the next page you will have a current order showing you have a balance of zero, click Continue
- You are now ready to login. Enter the email address and password you just created and click LOGIN.

In the future please go directly to www.zipformonline.com to access your forms online. For more help visit www.zipform.com.

164 :: ZipFormOnline :: Registration Step 4 - Windows Internet Explorer

https://www.zipformonline.com/index.asp

mywebsearch Search Smiley Central Screensavers Cursor Mania PopSwatter Fun Cards

164 :: ZipFormOnline :: Registration Step 4

ZipForm^{Online} *GoBeyond*

OFFICIAL FORMS SOFTWARE OF THE NATIONAL ASSOCIATION OF REALTORS®

Thank you for your order!
 You have NOT been billed as the amount indicated is \$0.00. You may want to print this page for your records by using your browser Print function. [Click here](#) to log in and start using ZipForm Online today.

Order Summary

Item	Exp. Date	Full Price	Proration	Prorated Price	Discount	Premium	Charged Amount
ZipForm Online Base Service	1/2/2009	\$59.95	\$0.00	\$59.95	(\$59.95)	\$0.00	\$0.00
Arizona Regional MLS, Inc.	1/2/2009	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Arizona Assoc. of REALTORS	1/2/2009	\$49.95	\$0.00	\$49.95	(\$49.95)	\$0.00	\$0.00
Items(s) Subtotal							\$0.00
Grand Total							\$0.00

Login

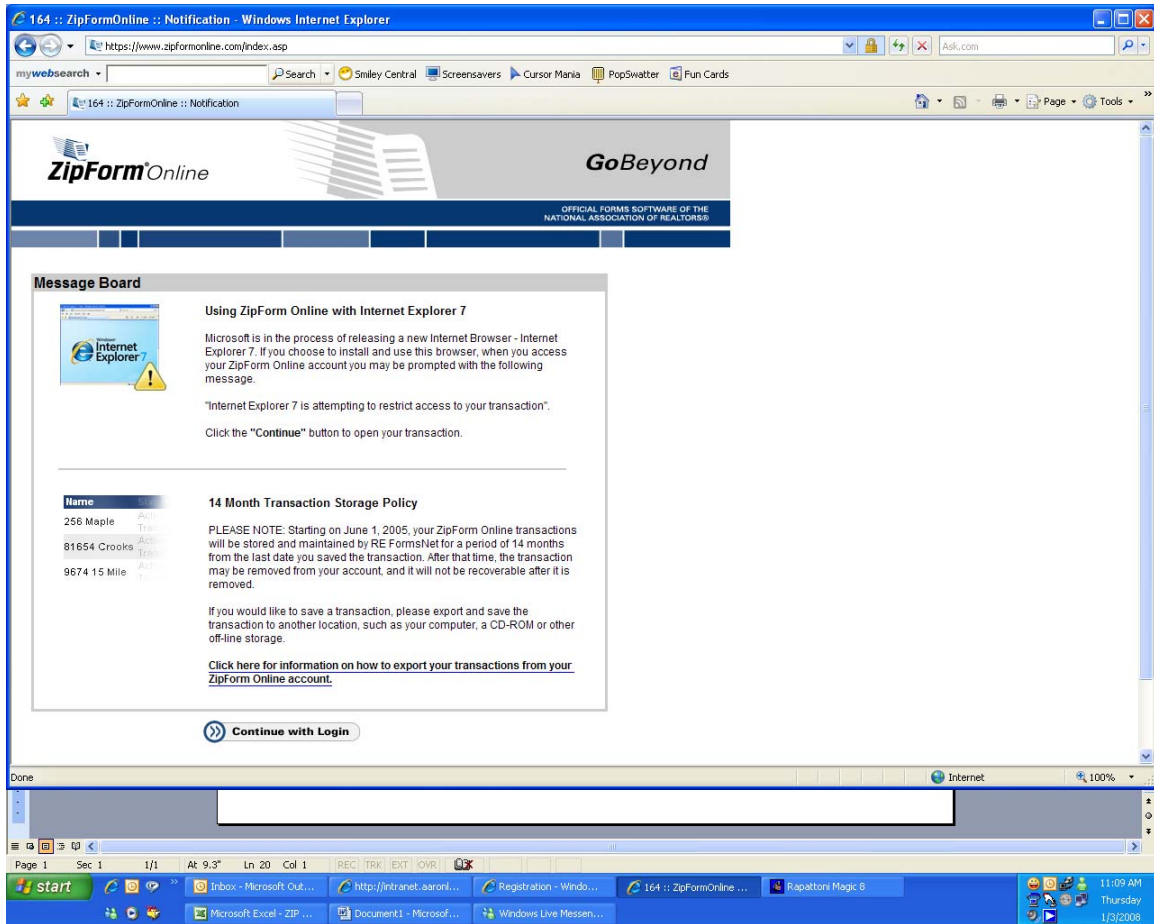
Secure click Benefits [Terms of Use] [Copyright] [Privacy & Security] [Support] PRODUCTS BY RE FormsNet®

Done Internet 100%

start Microsoft Outlook Microsoft Excel - ZIP Document1 - Microsoft Windows Live Messenger

11:08 AM Thursday 1/2/2008

- Next, a MESSAGE BOARD will appear explaining the usage of ZipForm Online and the 14 month storage policy (as seen below). After reading, click **CONTINUE WITH LOGIN** which will direct you to www.zipformonline.com (which is where you will go from now on to use ZipForm Online).



Creating a Transaction:

1. Navigate to www.zipformonline.com in your web browser and log in with our user name and password.
2. Click the **ADD (Create)** button (on the right, middle of page).
3. Assign a name to the transaction; Common name you might use could be the Seller, the Property address, or another identifier that you choose. You can choose the Transaction Type and Property Type by using the pull-down menus.
 - There is an option for using a Template to start or "seed" a transaction (explained later in the hand out). If you want to use a Template that you have already created, choose it from the Template pull-down menu. Click the Add button to continue. The Form Viewer will open automatically.
4. With the Form Viewer open, choose a form to start your transaction. If you have multiple libraries available to you, you will be able to select one of them via a pull-down menu. You must select at least one form.

5. With the Form Manager pane open, you will see the forms in your transaction listed in the Transaction Forms pane. Forms that are available to be added to the transaction are listed in the Library Forms pane. If you have multiple libraries available to you, you will be able to select one of them in the Library Forms pane via a pull-down menu. Double-click a form in the library to add to your transaction.
 - Forms that show up in the Library Form pane will be either black or blue in color. Forms that are black have been downloaded and stored locally on your computer. This happens automatically as you select forms for your transaction.
 - Forms that are blue have not been downloaded yet; double-clicking on the blue form will cause that form to be downloaded and added to your transaction. Once the form has been downloaded once, it will turn black in the library. The reason for storing forms locally is so that you don't have to keep downloading the same form over and over again. Whenever an updated version of the form becomes available, however, the form color will change to blue again. When you double-click on it the form will be downloading again in its new version.
6. When you are finished adding forms and information to your transaction, click the save icon in the tool bar to save the transaction.

Cover Sheets

It is recommended that you include The Arizona Association of REALTORS® Cover Sheet as one of the forms in your Transaction. The information (data) on the Cover Sheet will flow to the other forms which are required for that transaction. Completely filling out the Cover Sheet will fill out the majority of information in the other forms in your transaction. It also provides a single place to look at basic information about the transaction.

Navigating and Entering Information in the Form Viewer

In the Form Viewer, you can move between fields on the active form page by either clicking into a data field with your mouse or by using the tab key to move from one field to the next. Only the active page is editable. You can easily navigate between forms and pages in two ways.

1. Use the Navigation toolbar features. Choose the form in your transaction that you want to work with by selecting from the Selected Form pull-down menu. Use the "VCR" buttons in the header bar to move forward or backward to different pages in the form.

2. You can also click on the form and page icons in the Transaction Forms pane to move between forms and pages. Notice that some form fields include a pull-down menu. A city name field would be an example. Any information that you enter in such a field will be stored in a list and can be accessed from other similar fields so that you don't have to retype identical information. To use information in a list to fill the field, select the drop-down list with your mouse and click on your choice, or use the cursor keys on your keyboard to move through the list and press the Enter key to select your choice. You can edit these lists. Look on the File menu for Lookup Fields. Another type of field that uses a pull-down menu is a date field. Clicking the pull-down menu in a date field pops up a calendar. You may move around the calendar by days or by months. By clicking on a date and clicking OK you have now placed that date in your field.

- **NOTE:** If you want to override the default formatting in a field, place the cursor in the field and hit the space bar. The field will turn green which tells you that it is set to accept free-form text. This is effective for date, dollar and percentage fields. As you move between forms, you will notice that information from your Cover Sheet auto-populates into appropriate fields on other forms. If there is information on the Cover Sheet that does not show up in a field where you expect it, click on that field and see if there is a pull-down list. If there is, open it and you should see the information you want in the list. Simply highlight your selection in the list and it will come forward onto the form field.

Saving Transactions

Any time information is entered or changed, you'll have a chance to save it before closing the transaction. When you choose File -> Close, ZipFormOnline opens a dialog box prompting you to save. You can also save the transaction by clicking the Save icon in the header bar, or File -> Save from the menu bar.

Opening an Existing Transaction

Any existing transactions may be opened from the Transaction / Template List page. To open a transaction, click on the Select Actions dropdown menu at the right end the transaction line and choose the Open action. The Form Viewer will open the desired transaction.

Transaction / Template Page Features

An important one-click, time-saving feature allows you to filter your working list between agent templates and active transactions. Simply click on the appropriate word in the Transaction / Template List header. There are also a number of actions you can perform with transactions and templates. Notice the Select Actions field at the right side of each transaction or template. The available actions are:

- Open – Allows you to open a transaction or template in the Form Viewer so you can work with the forms and data.
- Email – Allows you to email the transaction (in ZipForm Transaction format) or separate PDF documents.
- Edit Header – Displays transaction header information and allows you to edit the transaction name and its attributes (e.g. type and status).
- Save As – Allows you to save a copy of a transaction or template to another name.
- Export – Moves transaction to local storage where it can be opened with ZipForm Desktop.
- View Header – Displays transaction header information (similar to Edit Header action except that the information is not editable.)
- Reassign – Allows an administrator to assign a transaction to another user. Normal users do not see this action.
- Delete – Allows you to delete a transaction.

Program Features

Strike-Outs

Another feature built into ZipForm Online is the Strikeout. Click on the toolbar icon to access the strikeout feature. Position the cursor at one end of the text you want to strike out, hold the left mouse button down and drag the cursor across the text. You'll notice that the text being struck out is highlighted black. Click away from the struck-out text to see the strikeout in place. With the strikeout feature active, you can remove a strike out by double-clicking on any part of the lined-out text. The strikeout feature will remain active until you click on the strike-out icon again or begin typing information into a field.

Templates

A powerful feature, the template is a special kind of transaction that can be used to start (or "seed") another one. Templates usually contain forms and information that don't change from transaction to transaction like your name, phone numbers and office address. Templates can save time and assure accuracy when you know you are going to be using the same

basic transaction repeatedly. They are also useful for assembling packages of forms such as "listing" or "sales" packages.

Template management is combined with transaction management in the Transaction/ Template List because templates are very much the same as transactions, so the system is much more efficient by handling them both on one page.

Find Template. The easiest way to get a list of Agent Templates is to click on the word "Template" in the Transaction / Template List header. Your list will be filtered to show only "agent templates". (You can also click on the word "Transaction" in the Transaction/ Template List header to filter out a list of active transactions.)

As an alternative, you can use the Find Transaction/ Template window of the Transaction/ Template List page and open the Transaction/ Template drop-down list. Choose Agent Template and click the Find button. Your list will be filtered to show only "agent templates".

(If you have not created any agent templates, this list will be empty.) Also, whenever the Transaction/ Template List page is first displayed, it lists Active Transactions by default.

Add a Template. There are two ways to add a template.

1. Save As. Choose an existing transaction. Click on the Select Actions drop-down menu choose the Save As action. Name the template. Open the Transaction/ Template list and choose "Agent Template." Click the Copy button. Use the Find Templates procedure to find the template and the Open action to edit the template
2. Add Transaction. Click the Add (Create) Transaction button. Name the template. Open the Transaction / Template list and choose "Agent Template." Click the Add button. The template will open in the Form Viewer where you can add forms and data.

Editing Tools

ZipForm Online includes standard Windows Cut, Copy and Paste tools.

Clause Manager

Notice the [Clause Manager] link on the Transaction/ Template List page. The Clause Manager allows you to compose, catalog and store an unlimited number of clauses. Create and store a clause when you have specific text that you want to use over and over. Clauses are effective when lengthy or complex text is used occasionally or using a

template is unwarranted. When a clause is always required in a specific case or used on a frequent basis, consider using a Template. You may create, edit or delete your own clauses. In addition, an administrator may create and store "Location" or "Global" clauses. If these "higher" level clauses are available for you to use, you can use them but you will not be able to edit or delete them. Location (or "office") clauses are available to users assigned to a specific location while "global" (or "broker") clauses are available to all users in the organization. In the Form Viewer, clauses may be recalled and pasted into a field, saving you from having to type the clause repeatedly. To use a clause that you have already created, click on the field of the form which you want to add the clause to and open the Clause Editor. Find the appropriate clause and click on the Use Clause button. The clause will be pasted into the active field.

Printing

You can print the current form from the Toolbar. Use the Print icon button in the Toolbar to print the active form on your default printer. You may also print all of the forms in the transaction by clicking on the arrow to the right of the print icon and selecting Print All Forms.

Mortgage Calculator

A simple mortgage calculator is provided that can help with loan payments and amortizations. Use the Mortgage Calculator icon button in the Toolbar.

Sticky Note

Sticky notes are handy because you can exchange information and draw attention to specific form areas with them. You can place a note wherever you want on the active page and add what ever text you want. Place as many notes as you want in the transaction. Use the Sticky Note icon button in the Toolbar. Please note: sticky notes will not show up if you save or email in the PDF format.

Spell Check

Use the Spell Check feature to check the spelling of information you have added to a transaction. NOTE. The form text itself is not checked. Use the Spell Check icon button in the Toolbar.

Dialog View

Any active page that has fields on it can be reduced to its “dialog” view. The dialog view of a page shows only the data fields and labels without the form text. This can be a handy way to concentrate on the fields of a page for rapid data entry. Use the Dialog View icon button in the Toolbar

Emailing Transactions

ZipForm Online takes advantage of web-based email so there are no configuration issues or email programs to install. Documents may be emailed in a ZipForm Transaction format or an Adobe PDF format. Adobe PDF is the most common format used to share electronic documents. PDF files are smaller in size, yet maintain all of the content and formatting of the original document. PDF files created by ZipForm Online are locked and cannot be edited or changed once they are created. Further, a PDF document may not be re-imported into the ZipForm Online or ZipForm Desktop programs. If you want to email and share the transaction with someone who will use ZipForm Online to edit the information, send the transaction in ZipForm Transaction format.

- To email a transaction from the Transaction / Template List page:

1. Select the transaction that you want to email and choose the Email action.
2. Type in the To: and Cc: addresses in the field provided. You may type Additional Comments if you wish. These will precede the instructions about how to download the appropriate viewer (ZipForm Transaction viewer or PDF Reader).
- 3a. You may want to send the forms in PDF. PDF documents by their very nature are already locked and do not require a password, so leave the password fields blank.
- 3b. If you want to share the transaction with another ZipForm user so that they may import it and use it, send the transaction in ZipForm Transaction format. The document will be sent “locked.” You may enter a password to further secure the document. (You do not have to enter a password.) A locked transaction may not be edited in ZipForm Online or ZipForm Desktop until it is unlocked with the proper password. Use a password that you will remember.
4. Click the Email button. A dialog box appears that lists all the forms in the transaction.

5a. If you want to send the attachment as a ZipForm Transaction, make sure you uncheck the Convert to PDF box. Use this window to choose which forms will be visible to the recipient (since all of the forms are included in the emailed transaction). If you click on the check box next to a form and remove the checkmark, the form will not be viewable by the recipient.

5b. If you are sending PDF documents, make sure the Convert to PDF box is checked. (NOTE. This box is checked by default.) Use this window to check the forms you want to send and uncheck those you don't want to send.

6. Click the OK button to complete the process

- To email a transaction from inside the Form Viewer:

At any time you can also prepare email from inside the Form Viewer. Choose File ->Email or click the Email icon.

Other Helpful Tips

Form Updates One of the many advantages of ZipForm Online is that you don't need to worry about updating your forms when a new version of the forms becomes available. When updated forms are made available, new library index will appear in the Form Viewer Library Forms pane. The form names in the index will appear blue. Double-clicking on a form downloads it from the server, automatically adds it to the open transaction and stores it on your computer so it doesn't have to be re-downloaded. You may choose to download all of the library forms at once by clicking the icon to the right of the Library Forms drop-down list. The amount of time required to download all of the forms will depend on the number of forms in the library and your available bandwidth (Internet connection speed).

Exporting a Transaction to ZipForm Desktop

If you want to access transactions when you are not connected to the Internet and you have ZipForm Desktop available, you can store ZipForm Online transactions on your hard drive or network. You must have a functioning installation of ZipForm Desktop to edit locally stored transactions. You may purchase a copy of ZipForm Desktop by visiting our website or by contacting our HelpDesk (1-800-383-9805). You can export (download) a transaction to your local computer from the Transaction / Template List page. Choose the transaction that you want to export. Click on the Select Actions drop-down menu choose the Export action.

You will be prompted to choose a location to store the transaction. If you are unsure, choose the Desktop. You can move it elsewhere later.

Importing a Transaction from ZipForm Desktop

If you have ZipForm Desktop transactions stored on your local computer, you may import (upload) them and work with them in ZipForm Online. This could be the case if you use ZipForm Desktop or if you previously exported a ZipForm Online transaction to the desktop. You can import a transaction from your local computer from the Transaction / Template List page by clicking on the Import button. This action will launch the Add Transaction page as described above under Creating a New Transaction. Note that the Import checkbox has a checkmark in it. A dialog window lets you locate the transaction you want to import. (**NOTE**. This file will have a ".ZFX" extension.) Locate the transaction on your hard drive and click OK. Once the import is complete, the Form Viewer will display the transaction. Save the transaction by follow the Saving Transactions instruction above.

Getting Help

Product support is available from our HelpDesk only to registered ZipForm Online users between the hours of 8:00 a.m. and 8:00 p.m. Eastern Time

Monday through Friday.

HelpDesk:

- support.zipform.com
- Fax Number :: 586-790-7582

Mailing Address:

RE FormsNet, LLC
18025 Fifteen Mile Road
Clinton Twp., MI 48035

Sales:

- Phone Number :: 866-693-6767
- Email :: sales@zipform.com
- Fax Number :: 586-790-7582

ZipForm Internet Site:

- www.zipform.com