zipCommunity™: Help At-a-Glance for Agents

CALIFORNIA ASSOCIATION OF REALTORS®

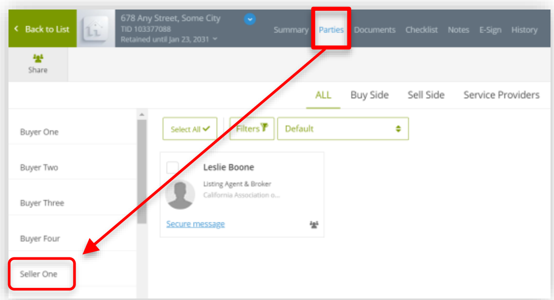
Secure Document Sharing

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 and view completed documents.

Share documents from your zipForm transaction (Agent)

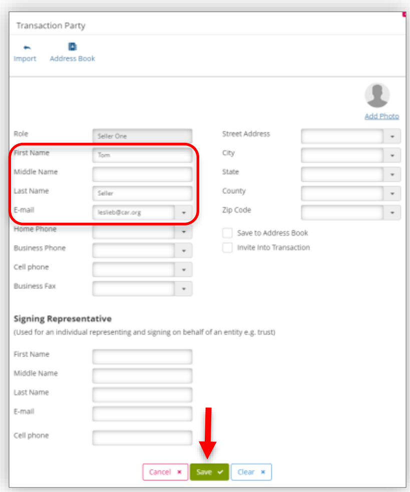
1. Inside your zipForm transaction, click the **Parties** tab in the gray navigation bar at the top of the page.

2. Click the **Role** of the person in the left navigation menu who you'd like to share documents with.

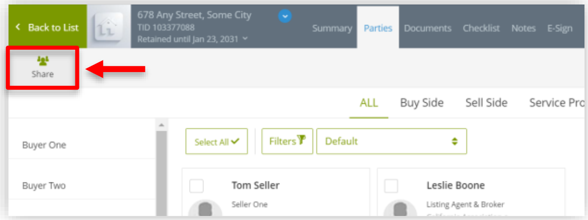


3. Type the party's **First Name**, **Last Name**, and **E-mail** address.

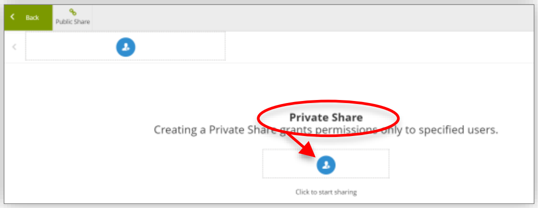
4. Click Save at the bottom of the window.



5. Click Share in the top toolbar.



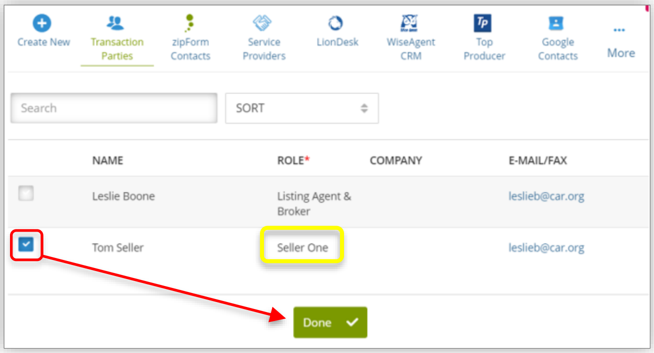
6. Under **Private Share**, click to get started.



7. Check the box to the left of the party you would like to share with.

NOTE: Confirm which party can edit the document. Usually, documents are fillable by the person with the role of Seller One, Landlord One, Buyer One, Tenant One in your transaction.

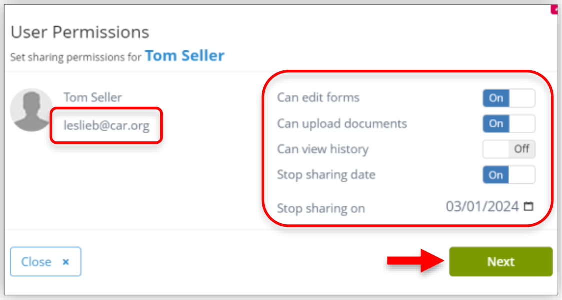
8. Click Done ✓ to continue.



9. Assign the **User Permissions** for your recipient:

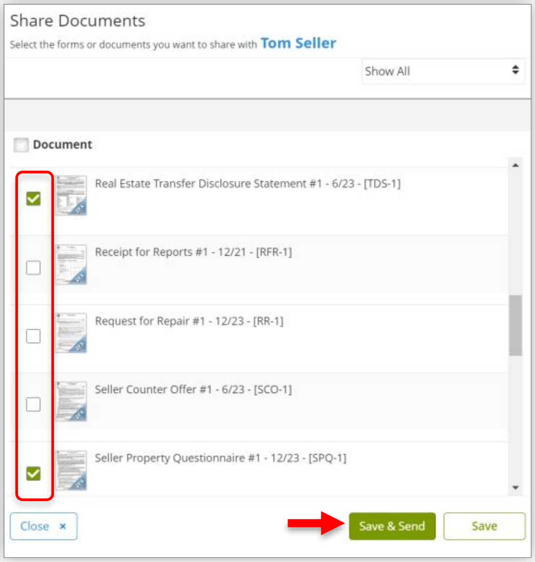
- **Edit the user's email address**, if needed.
- **Can edit forms** = turn this ON if you'd like your recipient to add data to or edit forms *(setting is OFF by default)*
- **Can upload documents** = *(optional)* turn this ON if you'd like your recipient to upload documents into your zipForm transaction *(setting is OFF by default)*
- **Can view history** = *(optional)* turn this ON if you'd like your recipient to view the History log of your interactions with them *(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)*

10. Click Next to continue.



11. Check the box next to each document you'd like to share with your recipient.

12. Click Save & Send to continue.



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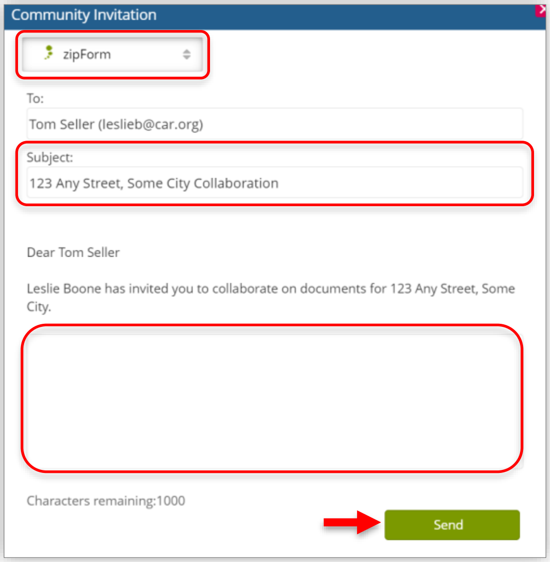
13. Complete the following:

- **Email Account** = select "zipForm" from the dropdown menu.
- **Subject** = *(optional)* edit the subject line of the email.
- **Message** = *(recommended)* type a message to the recipient.

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

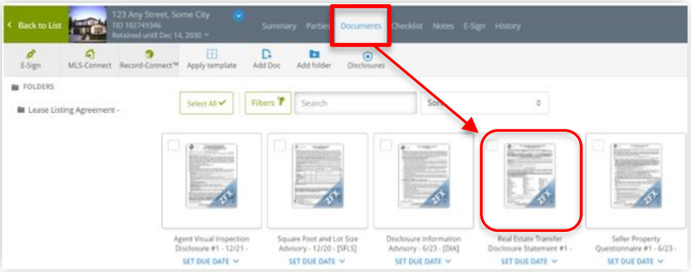


Preview Completed Documents (Agent)

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.

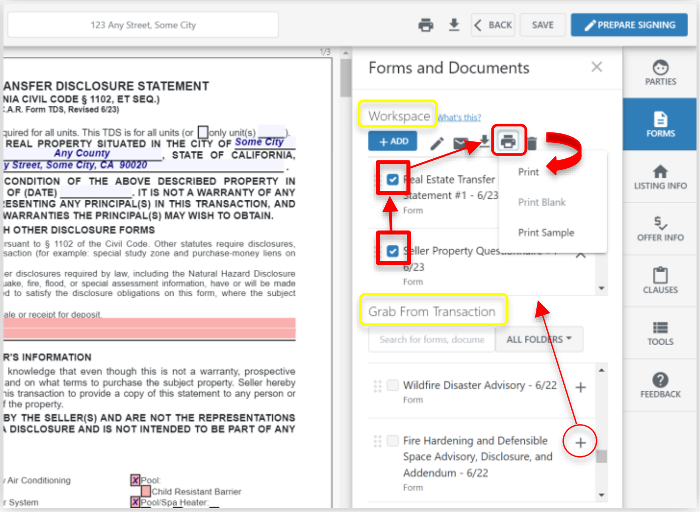
2. Click to open a form that was shared with the recipient.

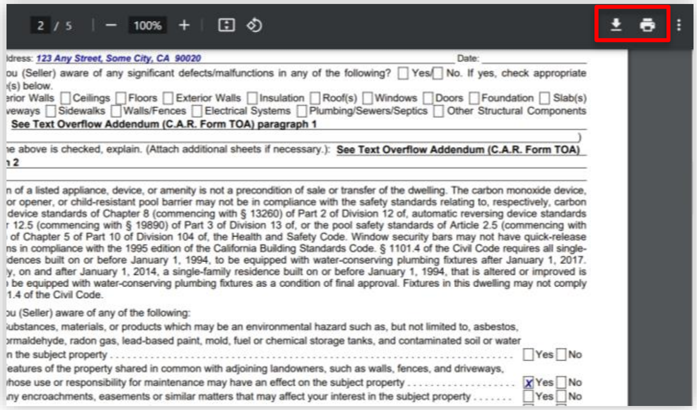


3. *(optional)* If you'd like to view multiple documents that the recipient completed, then add the remaining documents to the **Workspace** from the **Grab From Transaction** section by clicking the plus sign to the right of the document name.

4. Check the box(es) next to the form(s) in the Workspace, then click the **Print** icon.

5. Select **Print** from the menu.



The document will open in PDF format in your browser. **6.** *(optional)* Do one of the following steps: • Click **Download** in the top right corner to download the document to your computer. • Click **Print** in the top right corner to save as PDF or send the document to your printer.	
7. When you are done viewing the document, click the "X" to close the browser tab and return to your transaction.