

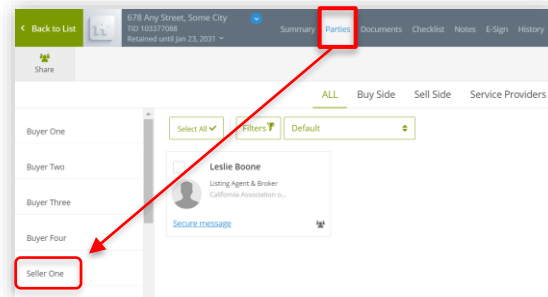
Secure Document Sharing

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)

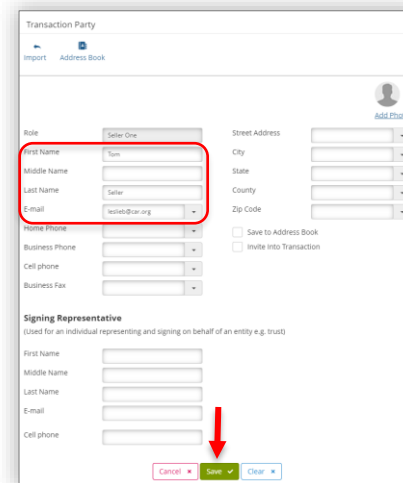
1. Inside your zipForm transaction, click the **Parties** tab in the gray navigation bar at the top of the page.

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

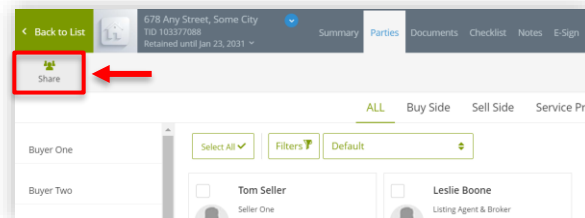


3. Type the party's **First Name**, **Last Name**, and **E-mail** address.

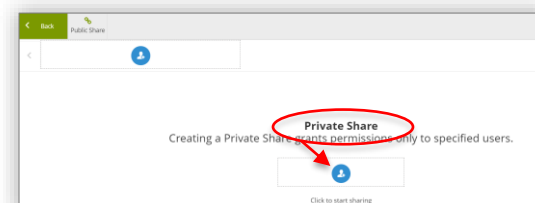
4. Click  at the bottom of the window.



5. Click  in the top toolbar.



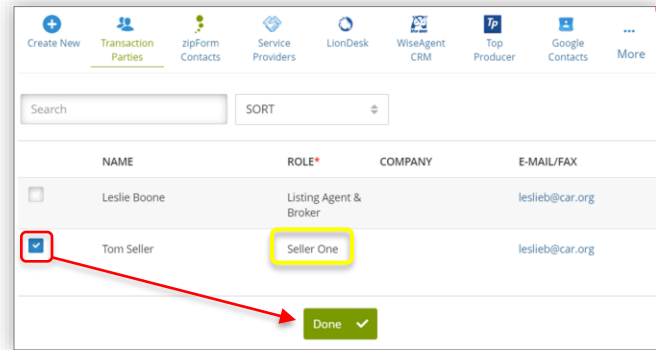
6. Under **Private Share**, click  to get started.



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.

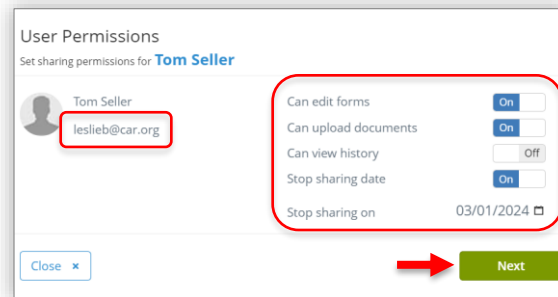
8. Click  to continue.



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

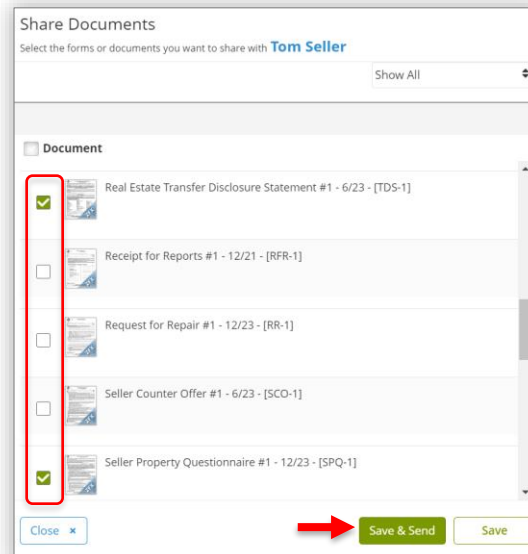
- **Edit the user's email address**, if needed.
- **Can edit forms** = turn this ON if you'd like your recipient to add data to or edit forms (*setting is OFF by default*)
- **Can upload documents** = (*optional*) turn this ON if you'd like your recipient to upload documents into your zipForm transaction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




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

12. Click  to continue.



13. Complete the following:

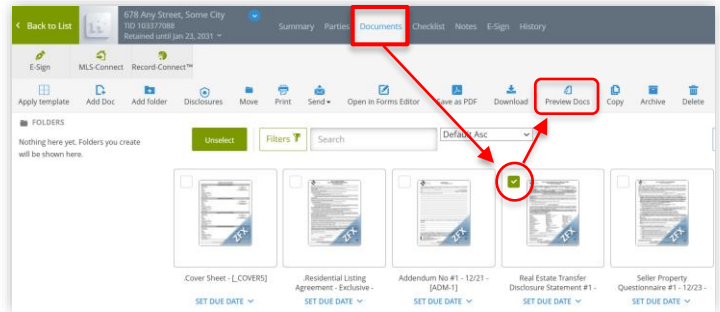
- **Email Account** = select “zipForm” from the dropdown menu.
- **Subject** = (*optional*) edit the subject line of the email.
- **Message** = (*recommended*) type a message to the recipient.

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

Preview Completed Documents (Agent)

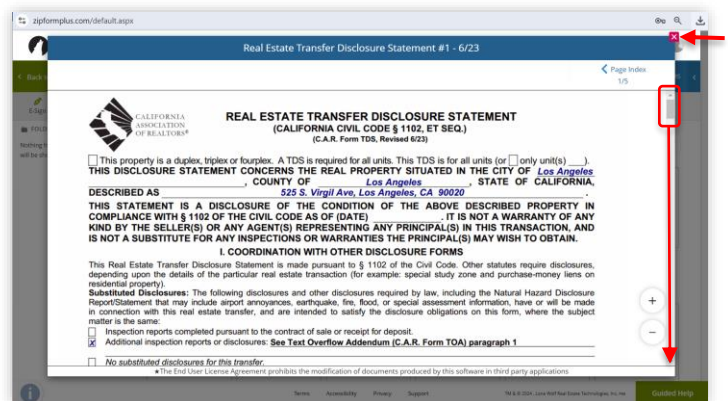
After the recipient completes the form(s), the Agent can view the recipient’s answers inside their zipForm transaction.

1. Open your zipForm transaction and click the **Documents** tab in the gray navigation bar at the top of the page.
2. Check the box on the document you’d like to preview.
3. Click **Preview Docs** in the top toolbar to open the document.



The document will display as a PDF inside your zipForm transaction.

4. Use the scroll bar on the right side to move through the document and read the client’s answers.
5. When finished viewing, click the X in the top right corner of the window to close the document and return to your transaction.
6. Repeat the above steps for each form you’d like to preview.



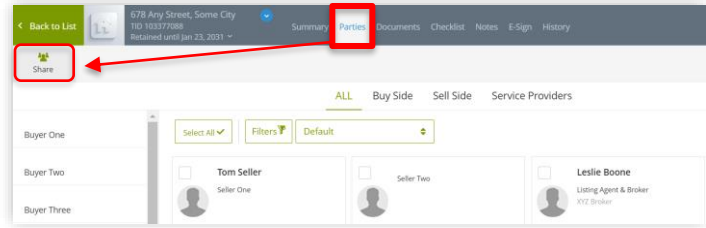
IMPORTANT: It is *not* recommended to preview the documents in the form editor. Be sure you are *not* viewing the documents in the form editor at the same time the client is filling out the forms.

Stop Sharing, Save as PDF, and Send Documents for Signature (Agent)

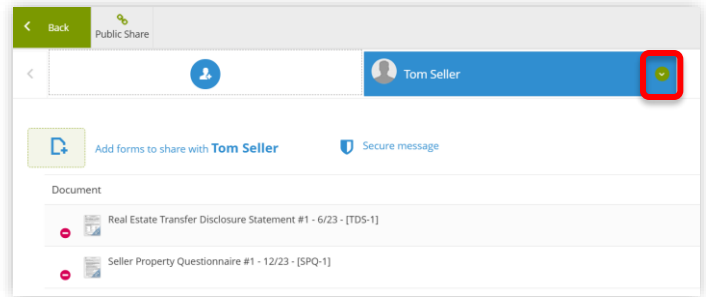
Stop Sharing

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

2. Click  in the top toolbar.

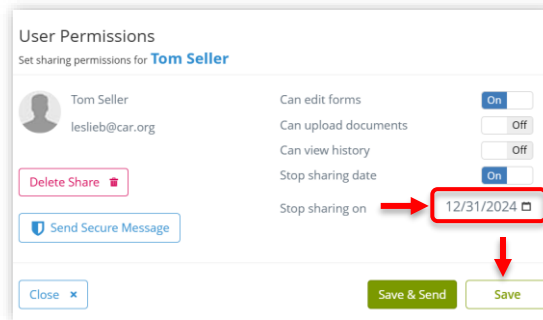



3. Click the dropdown arrow next to the person's name that you shared with.

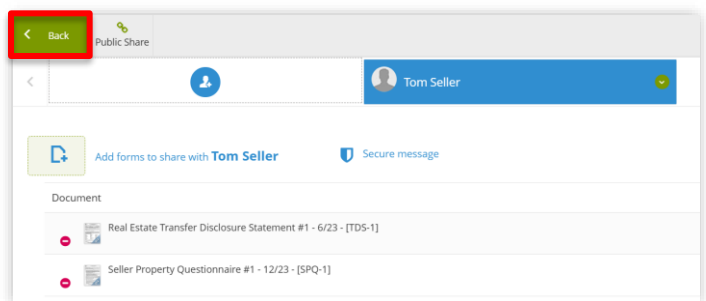


4. Click the date for **Stop sharing on** and change it to today's date.

5. Click  at the bottom of the window.



6. Click  to return to the **Parties** tab in your transaction.

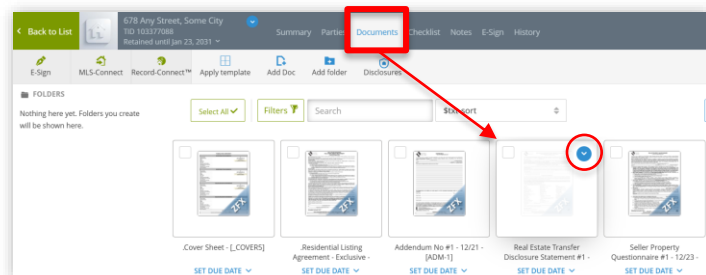


Save as PDF

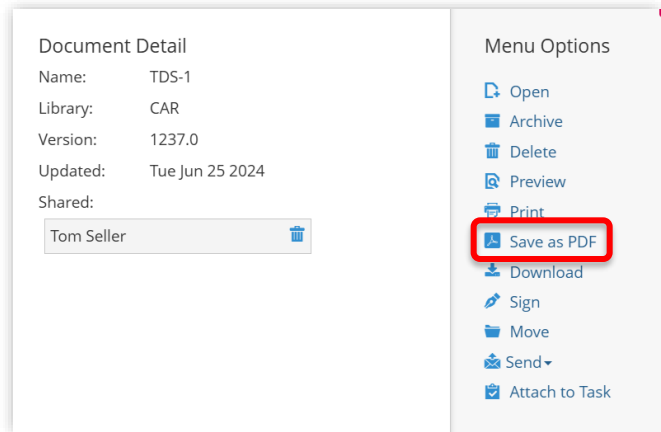
It's important to save the completed form as a PDF before sending it for signing to ensure there are no further changes to the document.

1. Click the **Documents** tab in the gray navigation bar.

2. Hover your mouse over a form that was completed in zipCommunity and click the blue dropdown arrow to open the **More Actions** menu.

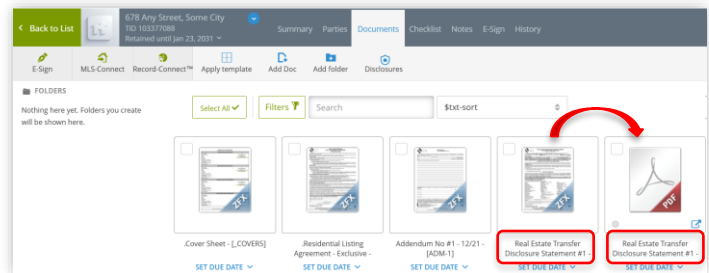


3. Select **Save as PDF** from the menu.



The system will create a PDF version of the form which will display directly next to the form.

4. Repeat the above steps for each form completed in zipCommunity that you'd like to send for signature.



Send for Signature

1. In the **Documents** tab in your transaction, check the box on each PDF you'd like to send for signature.

2. Click **E-Sign** in the top toolbar to start a signing packet with the selected forms.

