zipForm® Plus: New Form Editor Basics

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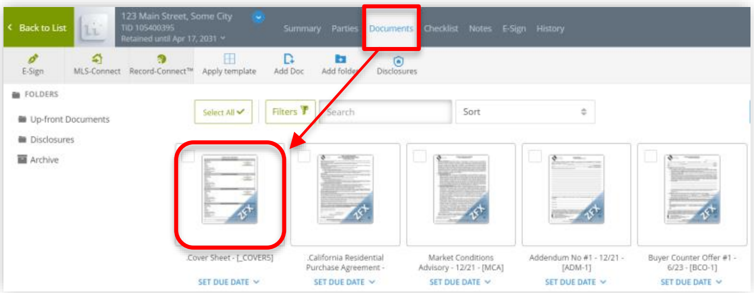
The New Form Editor is an all-inclusive Workspace to edit multiple forms at the same time, add forms from your form libraries, email documents from your transaction, download and print documents, start an E-Sign packet, and much more.

New Form Editor

1. On the **Documents** tab inside your zipForm transaction, click on a document to open it.



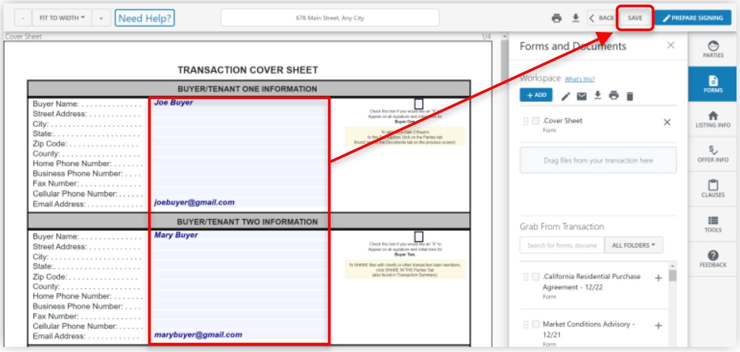
Add Data to Documents

The document you open displays on the left side of the screen, and the Workspace, tools, and other documents in your transaction display on the right.

1. Type to add data in the fields on the document.

2. Click SAVE at the top right to save your changes.

3. Click < BACK at the top right to exit the form editor and return to your transaction.

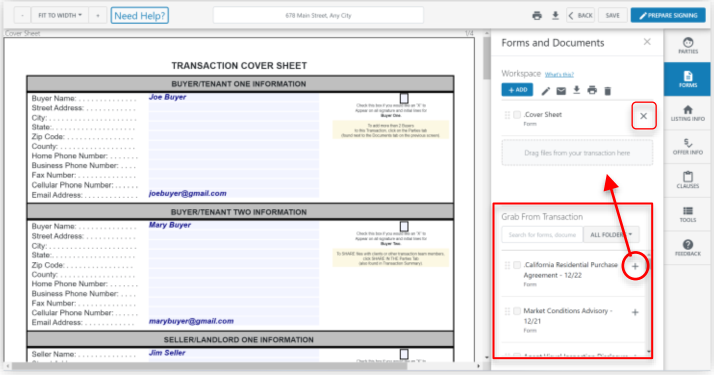


Edit Multiple Documents

You can work on multiple documents at the same time by adding them to the Workspace.

1. Click + next to any document in the **Grab From Transaction** section to move it to the **Workspace**. The documents in the **Workspace** display on the left side of the screen for you to view and edit.

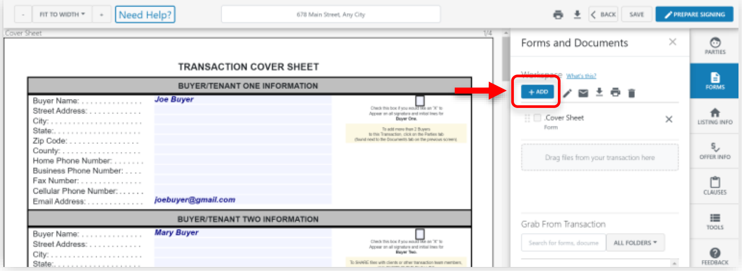
2. To remove a document from the **Workspace**, click X to the right of any document to return it to the **Grab From Transaction** section.



Add New Forms

You can add forms to your transaction from your form libraries or upload a PDF saved on your computer.

1. Click + ADD in the **Workspace**.

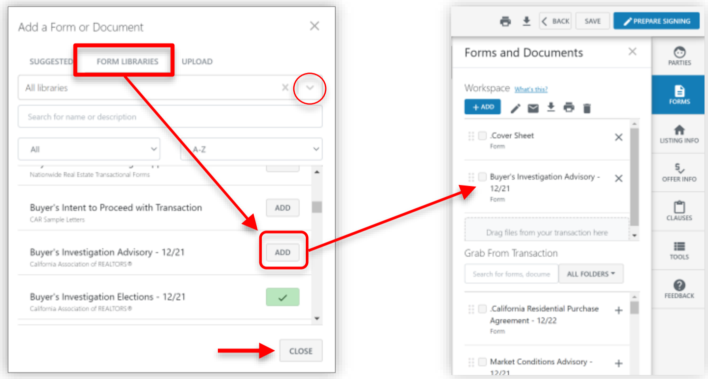


2. Click **Form Libraries** at the top of the popup window.

3. *(optional)* To switch libraries, click the dropdown arrow to the right of "All libraries" and select a library from the list. *(Default is "All libraries".)*

4. Click ADD next to a form to add it to the **Workspace**.

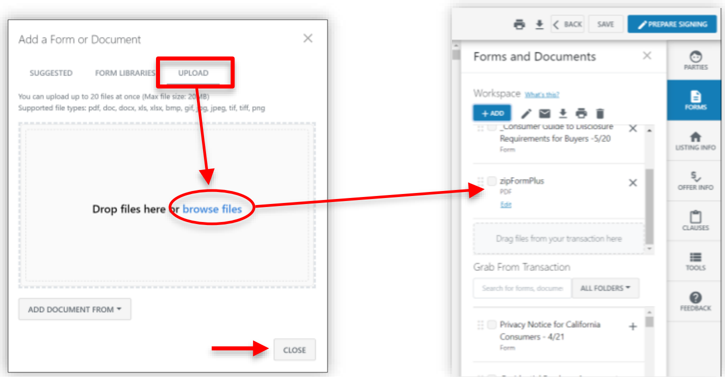
5. Click CLOSE to exit the window.



6. Click **Upload** at the top of the popup window to select a PDF saved on your computer.

7. Click browse files in the middle of the window and select the PDF file saved on your computer to add it to the **Workspace**.

8. Click CLOSE to exit the window.

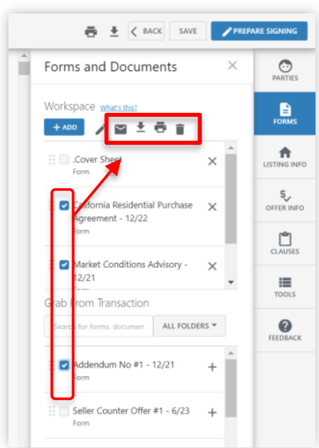


Email, Download, Print, Delete:

SELECTED FORMS

1. Check the box next to the form(s) in the **Workspace** and/or **Grab from Transaction** sections to do the following functions:

- = email selected documents in PDF format
- = download selected documents to your device
- = print selected documents
- = delete selected documents from your transaction

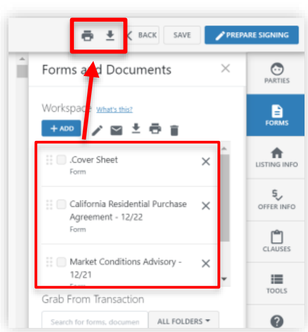


Download and Print:

ALL FORMS

1. The icons in the top taskbar take *all forms* in the **Workspace** and do the following functions:

- = print all documents
- = download all documents to your device



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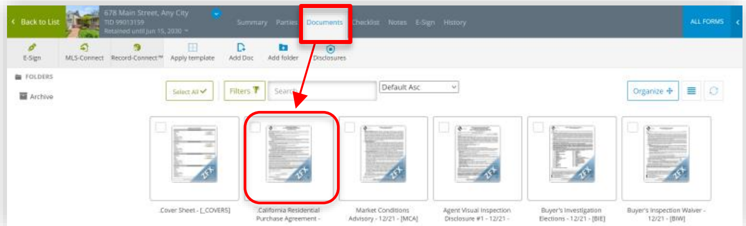
Create Signing Packets

There are two ways to start a signing packet inside the New Form Editor: 1) the pen icon in the Workspace for *selected documents* in the **Workspace** and/or **Grab from Transaction** sections, or 2) the “Prepare Signing” button for *all documents* in the **Workspace**.

1. On the **Documents** in your transaction, click to open a document you’d like to send for signature.

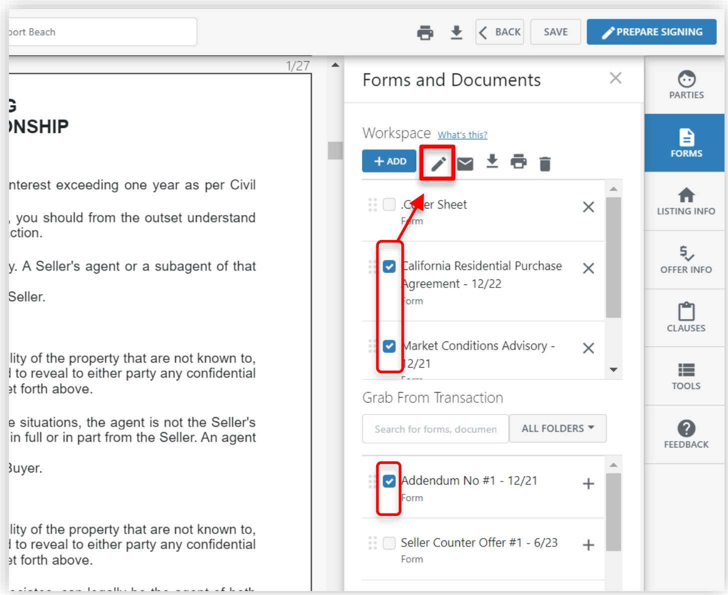


Selected Documents

1. Check the box next to the form(s) in the **Workspace** and/or **Grab from Transaction** sections that you’d like to send for signature.

2. Click  in the **Workspace** to start the E-sign process for the selected documents.

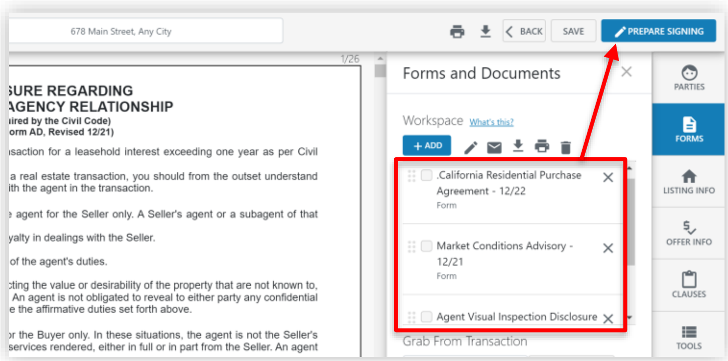
The **Pen** icon is programmed to take only the selected documents in both the **Workspace** and the **Grab from Transaction** sections and put them into a signing packet. On the next screens, you can add or remove documents, rearrange the order of the documents, and upload PDF files, if needed.



All Documents in the Workspace

1. Click PREPARE SIGNING to start the E-Sign process for all documents in the **Workspace**.

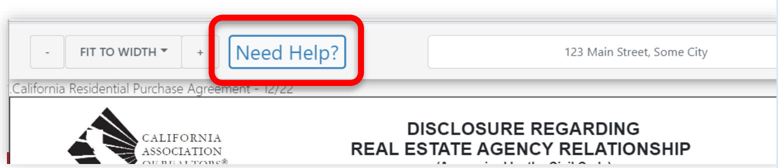
The **Prepare Signing** button is programmed to take *all documents* in the **Workspace** and put them into a signing packet. On the next screens, you can add or remove documents, rearrange the order of the documents, and upload PDF files, if needed.



Need Help?

Inside the New Form Editor

1. Inside the New Form Editor, click Need Help? on the top left side.



2. View videos and a step-by-step guide:

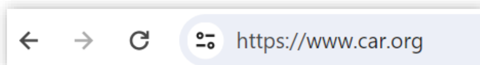
- Form Editor Basics (3 mins)

  This video covers the following topics:
  - Navigating the New Forms Editor
  - The Layout of the Workspace
  - Adding Documents from your Transaction
  - Adding Documents from your Forms Library
  - Sending Documents in your Workspace for Signature
- Form Editor Advanced (4 mins)

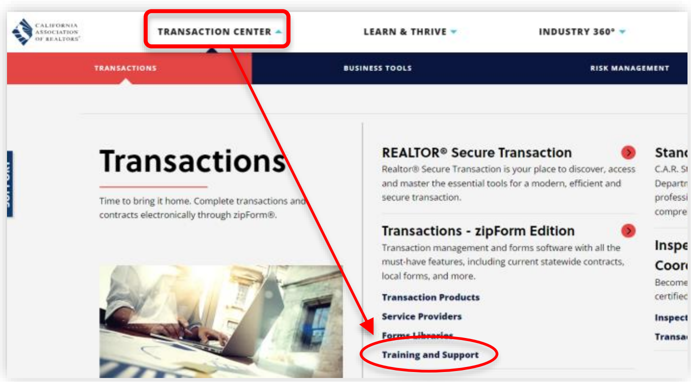
  This video covers the following topics:
  - Saving and Returning to your Workspace
  - How to Add and Edit Parties
  - How to Add and Edit Listing Information
  - How to Add and Edit Offer Information
  - How to Import Other Documents (i.e. PDF)
  - How to Edit PDFs
  - How to use Markup Tools
  - How to Create and Use Clauses
- Full Recorded Demo of Forms (11 mins)
- Quick Start Guide

On the C.A.R. Website

1. In your browser, go to www.car.org to view training guides, videos, and recordings of past training classes.



2. Click **Transaction Center** at the top left, then click **Training and Support** in the "Transactions – zipForm Edition" section in the middle of the page.



3. Click **FREE Training** to register for upcoming webinars and view past webinar recordings.

4. Scroll down the page to view zipTips videos on our YouTube playlist, zipForm FAQs, guides and videos on the New Form Editor, zipCommunity, Digital Signatures, zipForm Mobile, Broker and Team Edition, and more!