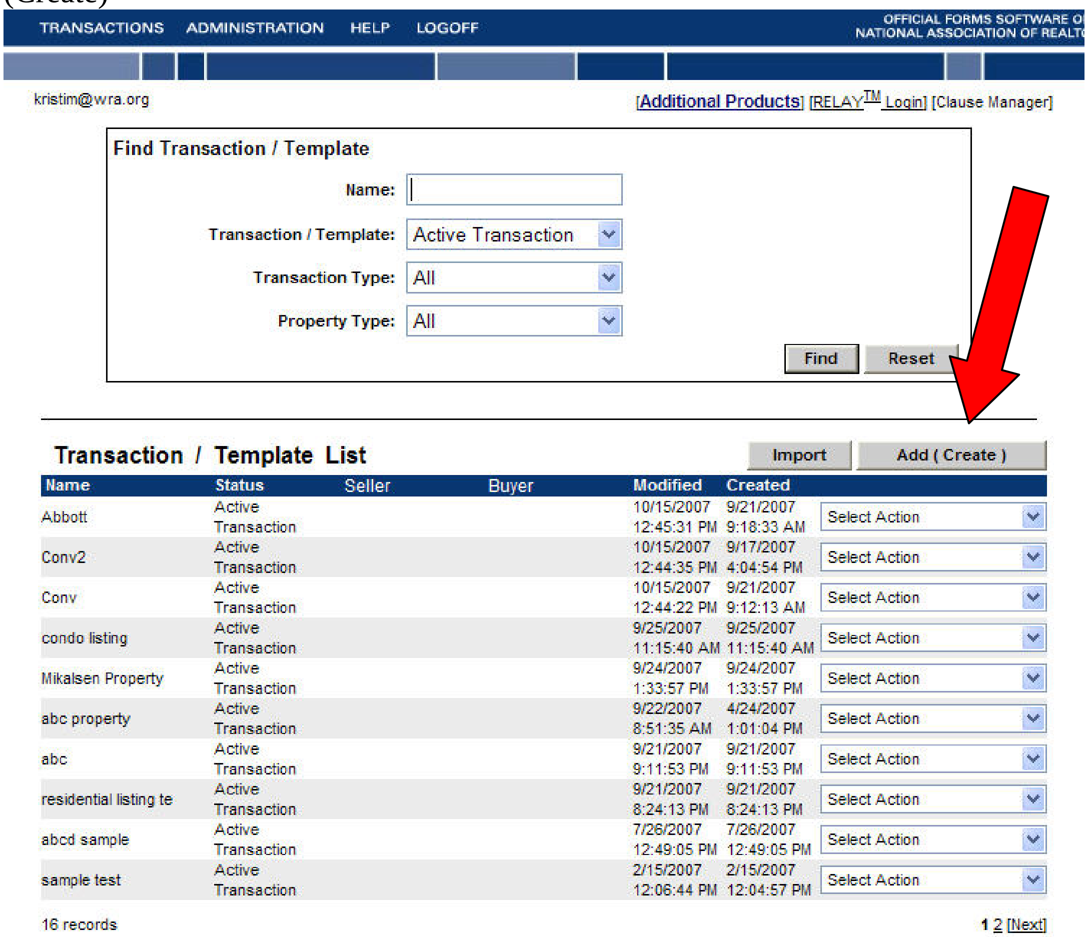
Creating a Transaction in ZipForm Online

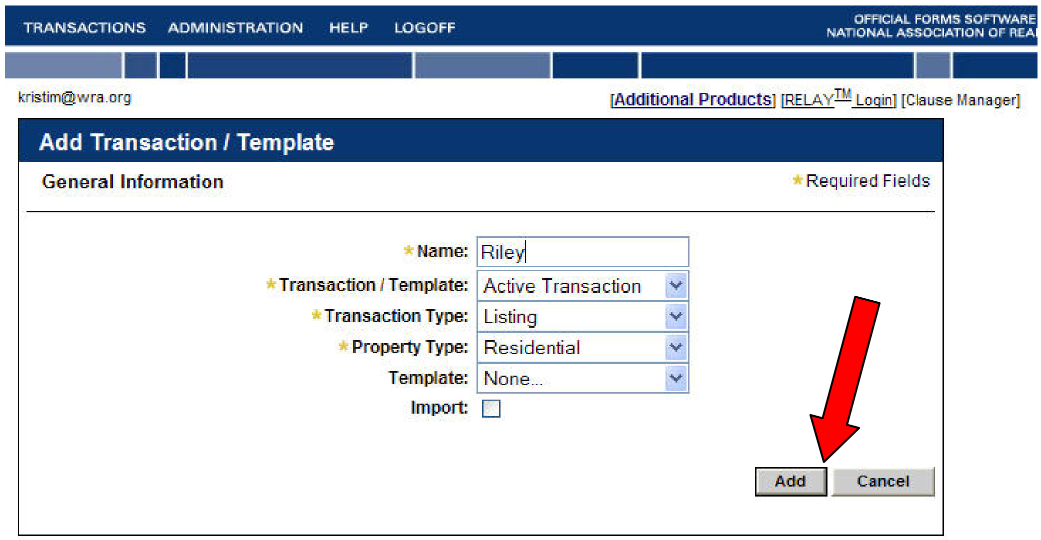
To use ZipForm you will need to create a transaction. A transaction is a file containing all the forms you use when working with a party to list or sell their home.

Follow these steps to create a transaction:

1) Log in to ZipForm Online
2) The first screen to appear is the Find Transaction/Template and Transaction/Template List window. This is where you can manage all your transactions. Click Add (Create)

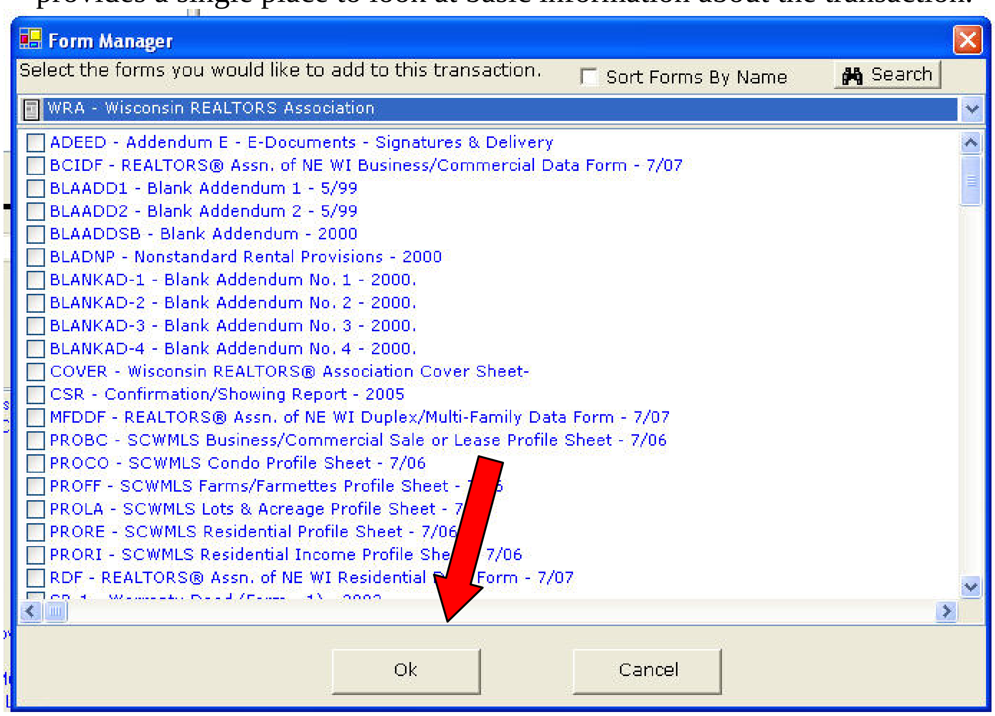


3) When the Add Transaction/Template window appears, enter a name for your transaction, choose the type of transaction you are creating (listing, purchase or lease), and select the type of property (residential, commercial, industrial, vacant land) you want. Templates you created and wish to use may be selected at this point also. NOTE: The transaction name will print in the lower right corner of your forms. Click Add.



4) When the Form Manager appears, select the form library and forms you want to use. Click OK.

- Cover Sheet - It is highly recommended that you include the Wisconsin REALTORS Association Cover Sheet as one of the forms in your transactions. The data on the Cover Sheet will flow to the other forms in the transaction thereby reducing the amount of time spent retyping data. It also provides a single place to look at basic information about the transaction.



5) The screen that opens will show three separate windows, the forms in the current transaction, the entire forms library from which you can add forms to your current transaction and one of your forms to fill in. Complete the forms by tabbing from field

to field.   Start with the Cover sheet. Press the Esc key to undo any mistyped information.

- Types of Fields:
    1. Lookup lists: ZipForm keeps a record of entries on certain data fields in your forms, such as city names, states, etc. in an easy-to-access drop-down list. When you activate a field such as City, you can “look up” cities you have already used by clicking the drop-down arrow and selecting the appropriate city. Note: Editing lookup lists can be done through the Edit menu (Edit > Lookup Fields).
    2. Auto format fields: Certain fields will auto format information to the most commonly used format. These fields include phone numbers, money, percentages, dates, social security numbers. Note: Pressing the space bar in a preformatted field (i.e. dollar, percentage, calendar fields) will clear the field formatting and allow text to be entered.
    3. Check Box fields: You can mark boxes either by pressing the space bar or by clicking the mouse on it.

6) To save your transaction, choose Save from the File menu or click the disk icon in the tool bar.
7) To print your transaction, choose Print from the File menu or click the printer icon in the tool bar.