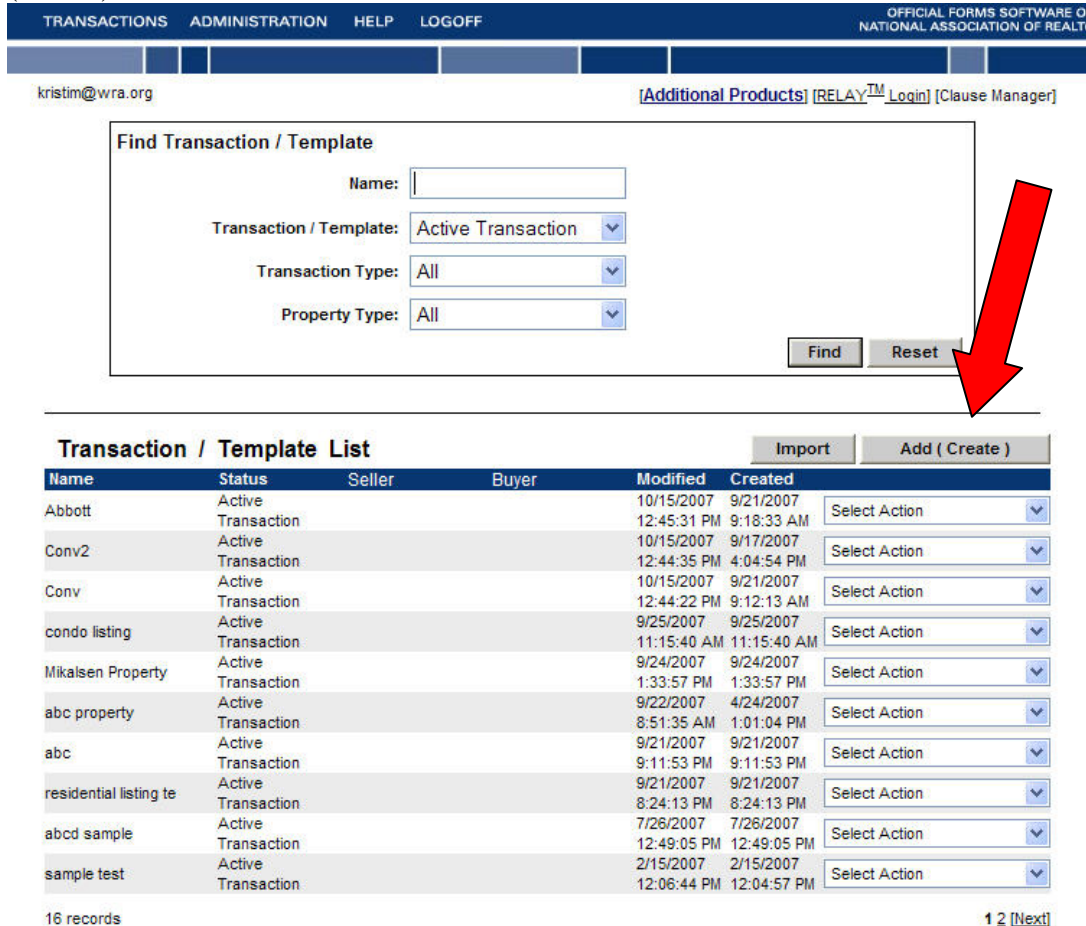


Creating a Transaction in ZipForm Online

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)



The screenshot shows the ZipForm Online interface. At the top, there is a navigation bar with links for TRANSACTIONS, ADMINISTRATION, HELP, and LOGOFF. Below this, the user's email address (kristim@wra.org) and the text "OFFICIAL FORMS SOFTWARE OF NATIONAL ASSOCIATION OF REALTORS" are visible. The main content area is divided into two sections. The top section is titled "Find Transaction / Template" and contains a search form with the following fields: "Name:" (text input), "Transaction / Template:" (dropdown menu set to "Active Transaction"), "Transaction Type:" (dropdown menu set to "All"), and "Property Type:" (dropdown menu set to "All"). There are "Find" and "Reset" buttons at the bottom right of this form. A large red arrow points from the "Find" button area down to the "Add (Create)" button in the table below. The bottom section is titled "Transaction / Template List" and contains a table with columns: Name, Status, Seller, Buyer, Modified, Created, and an action column. The table lists 16 records, each with a "Select Action" dropdown menu. The "Add (Create)" button is located in the top right corner of the table header.

Name	Status	Seller	Buyer	Modified	Created	
Abbott	Active			10/15/2007	9/21/2007	Select Action
	Transaction			12:45:31 PM	9:18:33 AM	
Conv2	Active			10/15/2007	9/17/2007	Select Action
	Transaction			12:44:35 PM	4:04:54 PM	
Conv	Active			10/15/2007	9/21/2007	Select Action
	Transaction			12:44:22 PM	9:12:13 AM	
condo listing	Active			9/25/2007	9/25/2007	Select Action
	Transaction			11:15:40 AM	11:15:40 AM	
Mikalsen Property	Active			9/24/2007	9/24/2007	Select Action
	Transaction			1:33:57 PM	1:33:57 PM	
abc property	Active			9/22/2007	4/24/2007	Select Action
	Transaction			8:51:35 AM	1:01:04 PM	
abc	Active			9/21/2007	9/21/2007	Select Action
	Transaction			9:11:53 PM	9:11:53 PM	
residential listing te	Active			9/21/2007	9/21/2007	Select Action
	Transaction			8:24:13 PM	8:24:13 PM	
abcd sample	Active			7/26/2007	7/26/2007	Select Action
	Transaction			12:49:05 PM	12:49:05 PM	
sample test	Active			2/15/2007	2/15/2007	Select Action
	Transaction			12:06:44 PM	12:04:57 PM	

16 records 1 2 [Next]

- 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.

TRANSACTIONS ADMINISTRATION HELP LOGOFF OFFICIAL FORMS SOFTWARE NATIONAL ASSOCIATION OF REALTORS

kristim@wra.org [Additional Products] [RELAY™ Login] [Clause Manager]

Add Transaction / Template

General Information * Required Fields

* Name:


* Transaction / Template:

* Transaction Type:

* Property Type:

Template:

Import:




- 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.

Form Manager

Select the forms you would like to add to this transaction. Sort Forms By Name

WRA - Wisconsin REALTORS Association

- ADEED - Addendum E - E-Documents - Signatures & Delivery
- BCIDF - REALTORS® Assn. of NE WI Business/Commercial Data Form - 7/07
- BLAADD1 - Blank Addendum 1 - 5/99
- BLAADD2 - Blank Addendum 2 - 5/99
- BLAADDSB - Blank Addendum - 2000
- BLADNP - Nonstandard Rental Provisions - 2000
- BLANKAD-1 - Blank Addendum No. 1 - 2000.
- BLANKAD-2 - Blank Addendum No. 2 - 2000.
- BLANKAD-3 - Blank Addendum No. 3 - 2000.
- BLANKAD-4 - Blank Addendum No. 4 - 2000.
- COVER - Wisconsin REALTORS® Association Cover Sheet-
- CSR - Confirmation/Showing Report - 2005
- MFDDF - REALTORS® Assn. of NE WI Duplex/Multi-Family Data Form - 7/07
- PROBC - SCWMLS Business/Commercial Sale or Lease Profile Sheet - 7/06
- PROCO - SCWMLS Condo Profile Sheet - 7/06
- PROFF - SCWMLS Farms/Farmettes Profile Sheet - 7/06
- PROLA - SCWMLS Lots & Acreage Profile Sheet - 7/06
- PRORE - SCWMLS Residential Profile Sheet - 7/06
- PRORI - SCWMLS Residential Income Profile Sheet - 7/06
- RDF - REALTORS® Assn. of NE WI Residential Data Form - 7/07
- CR 1 - Wisconsin Real Estate...



- 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.