zipForm® Plus: Broker Edition – Add a New User
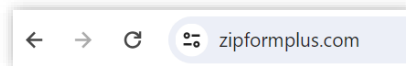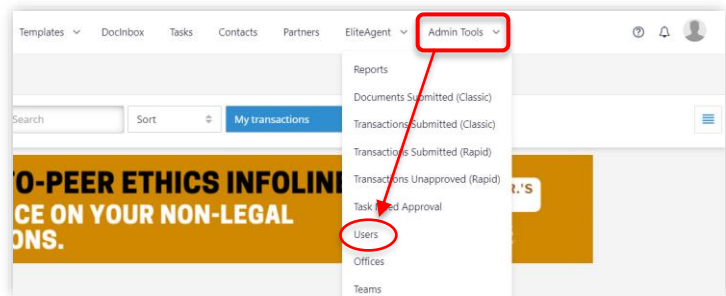
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Add users to your zipForm Broker Edition account, view the number of users in the account, and view how many seats are available in your account following the steps in this guide.
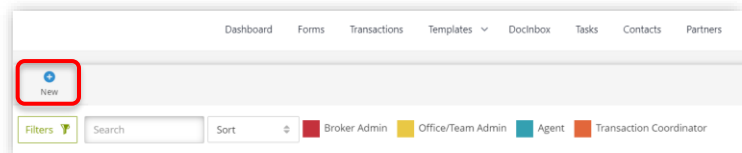
Add a New User

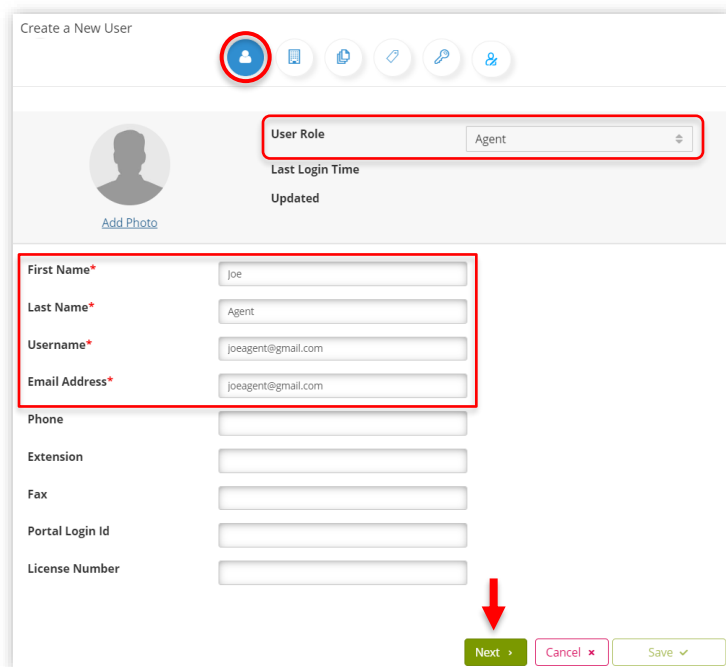|	
1. Open a browser and login to your zipForm brokerage account at www.zipformplus.com.	
2. Click **Admin Tools** in the top navigation bar. **3.** Select **Users** from the menu.	
4. Click **New** in the top toolbar.	
User Information **1. User Role** = default is "Agent". Click the dropdown menu to select a different role. **2.** Complete the following *required* fields: • **First Name** • **Last Name** • **Username** • **Email Address** **3.** Click **Next ›** at the bottom of the window to continue.	

Office Information

1. Multiple Offices:

- If your brokerage *has multiple offices*, you will need to assign the user to an office. Follow the steps below to properly assign an office location.
- If your brokerage *does not have multiple offices*, then this tab will default to the Corporate office.

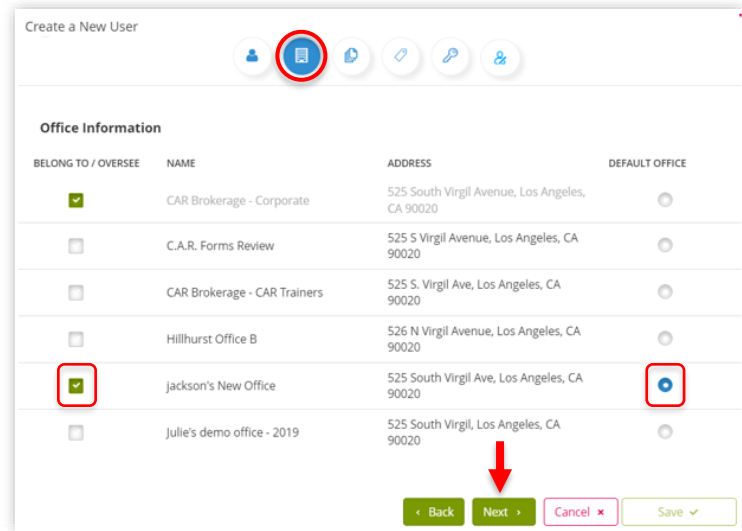**2. Check the box** in the left column next to the user's office location.

NOTE: The checkbox next to the "Corporate" office at the top of the list will always remain checked.

3. Click the **radio button** in the right column next to the same office to ensure that this office location shows in the user's zipForm profile *and* in the footer on real estate forms.

NOTE: The office information is maintained solely by the Broker and/or Admins. Agents cannot edit their office information when using a zipForm brokerage account.

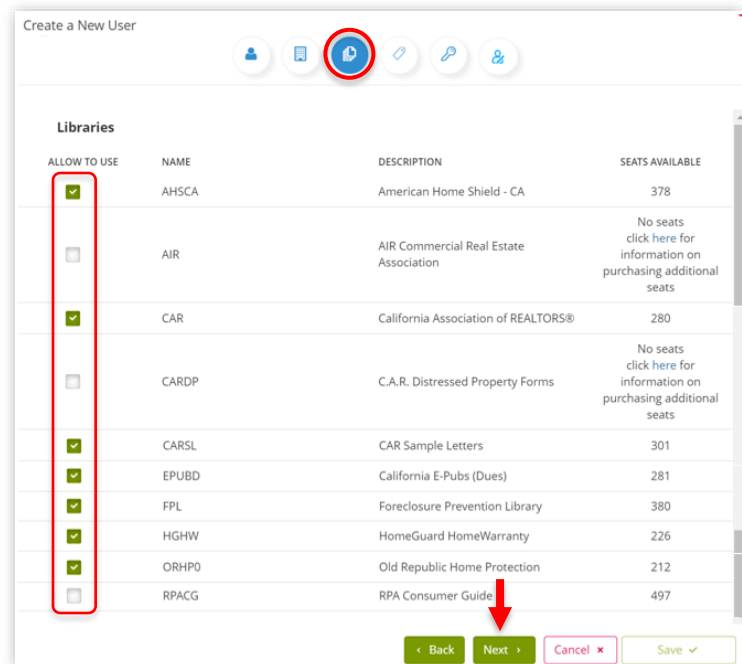**4.** Click **Next ›** at the bottom of the window to continue.

Libraries

1. Check the box in the left column next to each library you'd like the user to access.

**IMPORTANT:** Libraries for specific Associations can only be assigned to members of that Association.

2. Click **Next ›** at the bottom of the window to continue.

Products

This is where you'll assign MLS Connect and basic zipForm services.
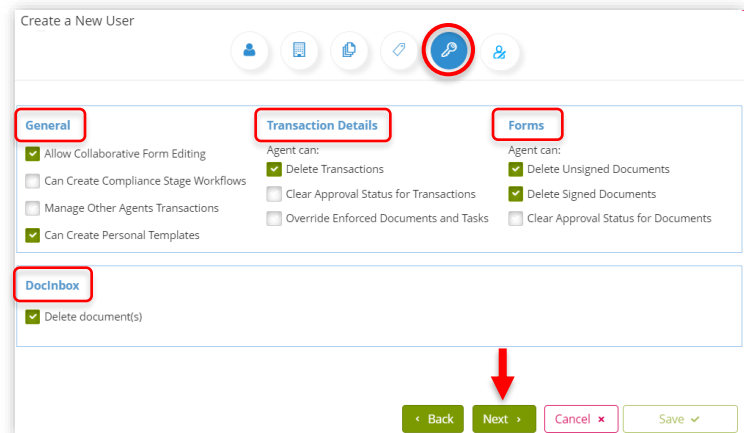
1. Check the box in the left column next to the user's MLS to use with MLS Connect.

2. Check the boxes in the left column for the basic zipForm services.

3. Click [Next ›] at the bottom of the window to continue.

Permissions

1. Check the box for the permissions in each section that you'd like the user to have.

2. Click [Next ›] at the bottom of the window to continue.

Settings *(optional)*

These settings are editable by the agent, however, you may edit them as well. Even if you do not edit these settings, you must access this screen in order to save the new user's profile.

1. *(optional)* Choose the default signing service and turn on/off system notifications.

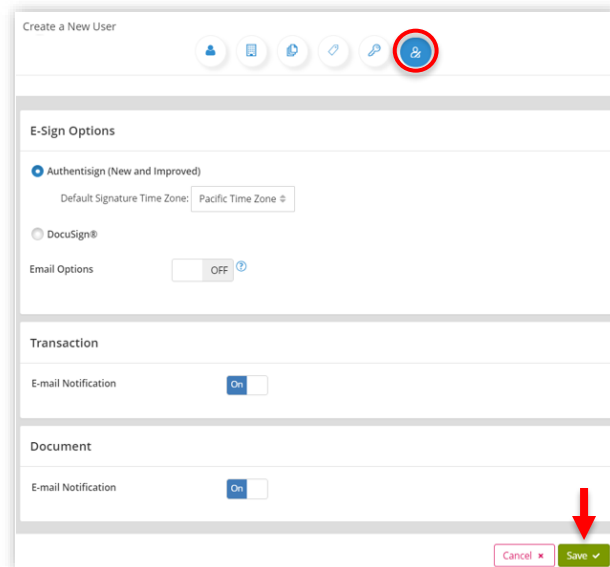**2.** Click [Save ✓] to save the user's account. The system will immediately send an email to the user prompting them to set a password for their account. Password set/reset links usually expire in 24 hours.

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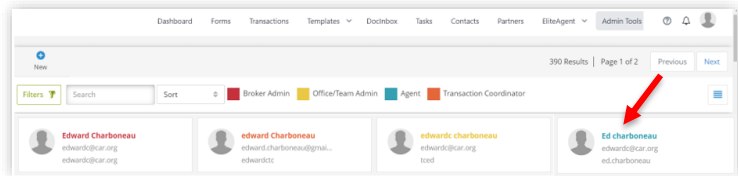ASSOCIATION
OF REALTORS®

View the number of Users in your Account

1. From the **Users** menu, view the number of results shown on the top right side.
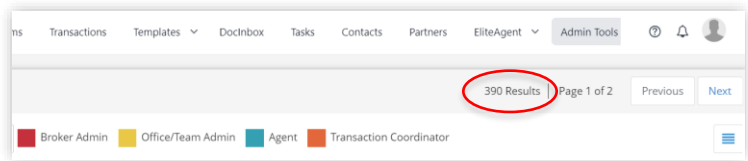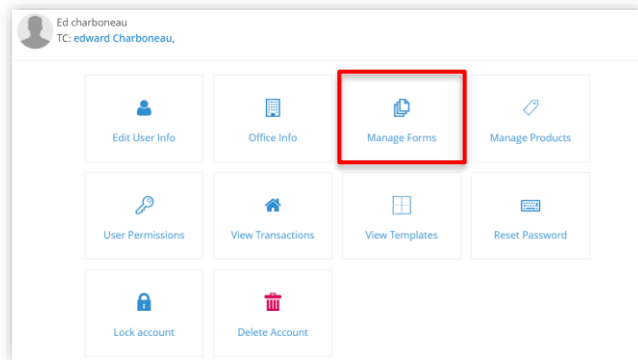

View the number of Seats available in your Account

1. From the **Users** menu, click to open any user's profile.

2. Click **Manage Forms**.

3. View the number of seats available to the right of each library.

4. Click [Cancel ×] to exit the user's profile.