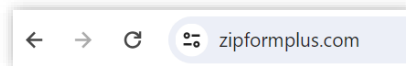


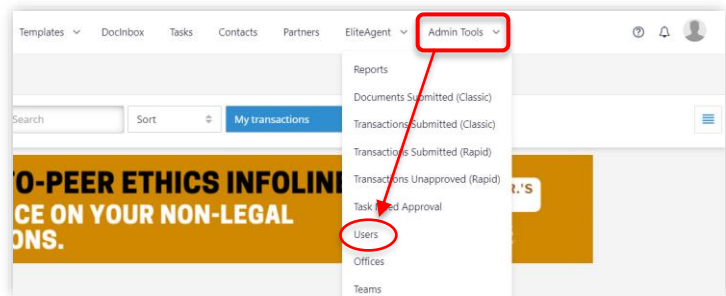
Add users to your zipForm Broker Edition account, view the number of users in the account, and view how many seats are available in your account following the steps in this guide.

## Add a New User

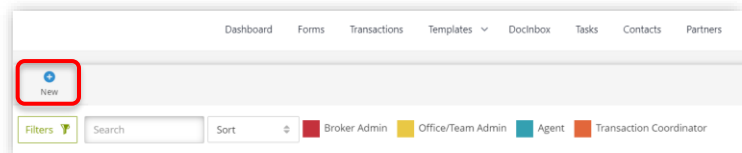
1. Open a browser and login to your zipForm brokerage account at [www.zipformplus.com](http://www.zipformplus.com).



2. Click **Admin Tools** in the top navigation bar.  
3. Select **Users** from the menu.



4. Click **New** in the top toolbar.



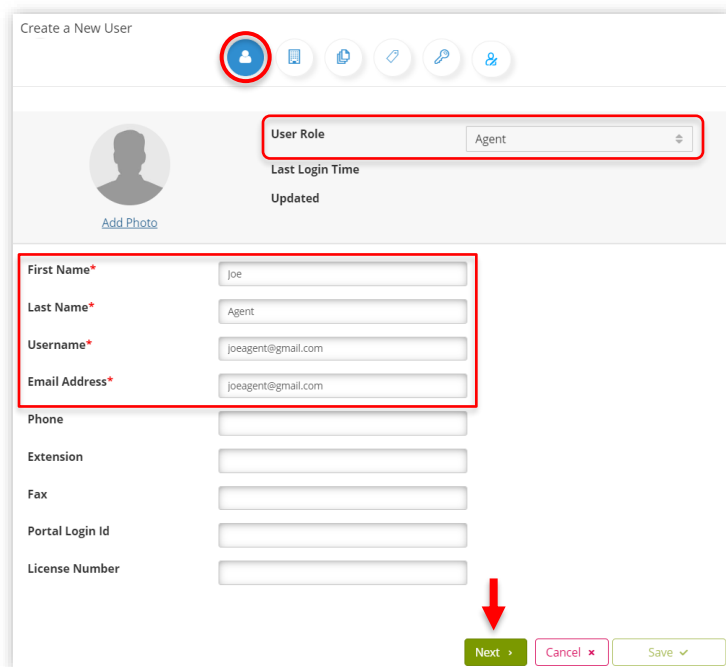
## User Information

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.



Create a New User

User Role: Agent

Last Login Time: Updated

First Name\* [ Joe ]

Last Name\* [ Agent ]

Username\* [ joeagent@gmail.com ]

Email Address\* [ joeagent@gmail.com ]

Phone [ ]

Extension [ ]

Fax [ ]

Portal Login Id [ ]

License Number [ ]

Next > Cancel x Save v

## 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.

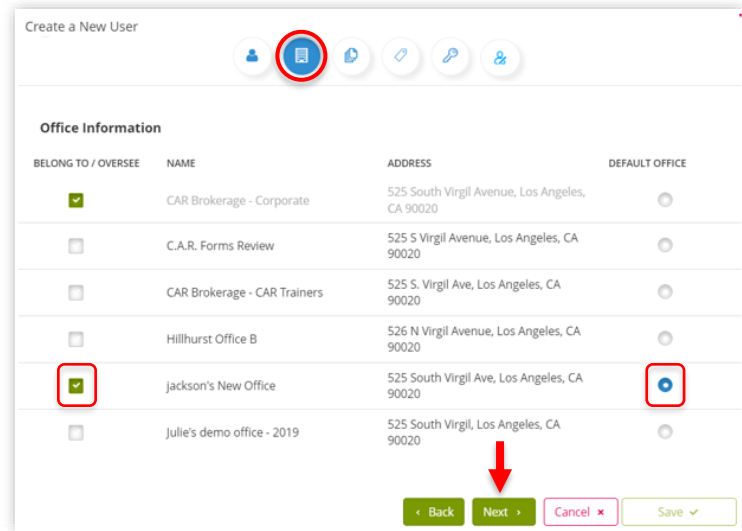
*NOTE: The checkbox next to the "Corporate" office at the top of the list will always remain checked.*

### 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  at the bottom of the window to continue.



Create a New User

Office Information


BELONG TO / OVERSEE	NAME	ADDRESS	DEFAULT OFFICE
<input checked="" type="checkbox"/>	CAR Brokerage - Corporate	525 South Virgil Avenue, Los Angeles, CA 90020	<input type="radio"/>
<input type="checkbox"/>	C.A.R. Forms Review	525 S Virgil Avenue, Los Angeles, CA 90020	<input type="radio"/>
<input type="checkbox"/>	CAR Brokerage - CAR Trainers	525 S. Virgil Ave, Los Angeles, CA 90020	<input type="radio"/>
<input type="checkbox"/>	Hillhurst Office B	526 N Virgil Avenue, Los Angeles, CA 90020	<input type="radio"/>
<input checked="" type="checkbox"/>	Jackson's New Office	525 South Virgil Ave, Los Angeles, CA 90020	<input checked="" type="radio"/>
<input type="checkbox"/>	Julie's demo office - 2019	525 South Virgil, Los Angeles, CA 90020	<input type="radio"/>

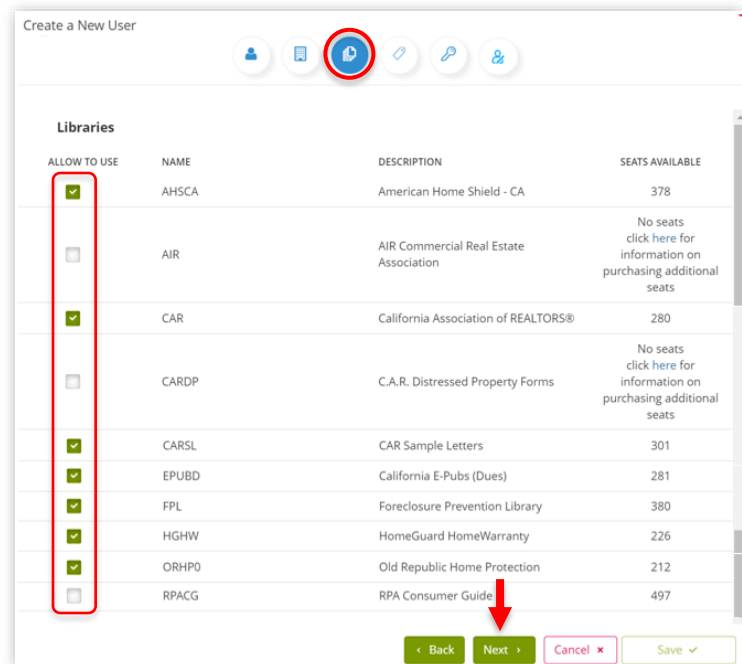
   

## Libraries

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  at the bottom of the window to continue.



Create a New User


Libraries

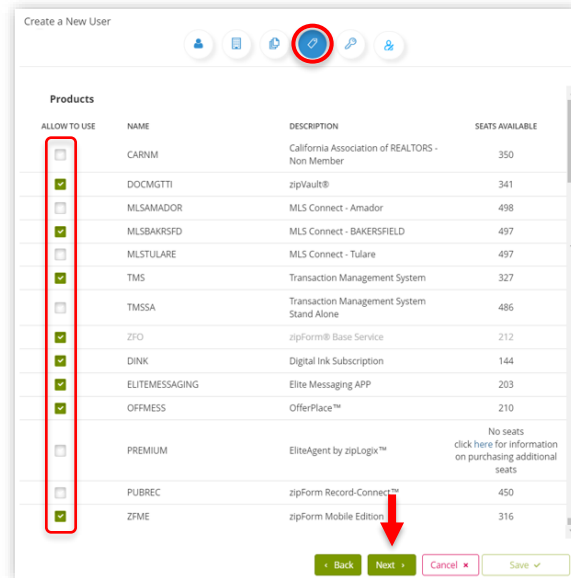
ALLOW TO USE	NAME	DESCRIPTION	SEATS AVAILABLE
<input checked="" type="checkbox"/>	AHSCA	American Home Shield - CA	378
<input type="checkbox"/>	AIR	AIR Commercial Real Estate Association	No seats click here for information on purchasing additional seats
<input checked="" type="checkbox"/>	CAR	California Association of REALTORS®	280
<input type="checkbox"/>	CARDP	C.A.R. Distressed Property Forms	No seats click here for information on purchasing additional seats
<input checked="" type="checkbox"/>	CARSL	CAR Sample Letters	301
<input checked="" type="checkbox"/>	EPUBD	California E-Pubs (Dues)	281
<input checked="" type="checkbox"/>	FPL	Foreclosure Prevention Library	380
<input checked="" type="checkbox"/>	HGHW	HomeGuard HomeWarranty	226
<input checked="" type="checkbox"/>	ORHPO	Old Republic Home Protection	212
<input type="checkbox"/>	RPACG	RPA Consumer Guide	497

## Products


This is where you'll assign MLS Connect and basic zipForm services.

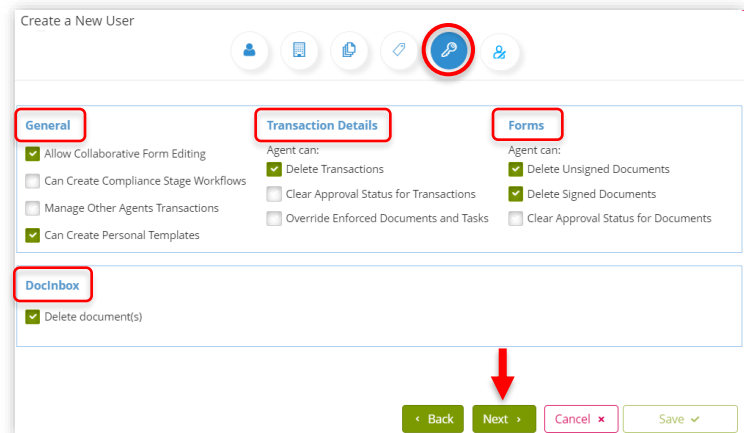
1. Check the box in the left column next to the user's MLS to use with MLS Connect.
2. Check the boxes in the left column for the basic zipForm services.
3. Click  at the bottom of the window to continue.



ALLOW TO USE	NAME	DESCRIPTION	SEATS AVAILABLE
<input type="checkbox"/>	CARNM	California Association of REALTORS® - Non Member	350
<input checked="" type="checkbox"/>	DOCMGTTI	zipVault®	341
<input type="checkbox"/>	MLSAMADOR	MLS Connect - Amador	498
<input checked="" type="checkbox"/>	MLSBAKRSFD	MLS Connect - BAKERSFIELD	497
<input type="checkbox"/>	MLSTULARE	MLS Connect - Tulare	497
<input checked="" type="checkbox"/>	TMS	Transaction Management System	327
<input type="checkbox"/>	TMSSA	Transaction Management System Stand Alone	486
<input checked="" type="checkbox"/>	ZFO	zipForm® Base Service	212
<input checked="" type="checkbox"/>	DINK	Digital Ink Subscription	144
<input checked="" type="checkbox"/>	ELITEMESSAGING	Elite Messaging APP	203
<input checked="" type="checkbox"/>	OFFMESS	OfferPlace™	210
<input type="checkbox"/>	PREMIUM	EliteAgent by zipLogix™	No seats click here for information on purchasing additional seats
<input type="checkbox"/>	PUBREC	zipForm Record-Connect™	450
<input checked="" type="checkbox"/>	ZFME	zipForm Mobile Edition	316

## Permissions

1. Check the box for the permissions in each section that you'd like the user to have.
2. Click  at the bottom of the window to continue.



**General**

- Allow Collaborative Form Editing
- Can Create Compliance Stage Workflows
- Manage Other Agents Transactions
- Can Create Personal Templates

**Transaction Details**

Agent can:

- Delete Transactions
- Clear Approval Status for Transactions
- Override Enforced Documents and Tasks

**Forms**

Agent can:


- Delete Unsigned Documents
- Delete Signed Documents
- Clear Approval Status for Documents

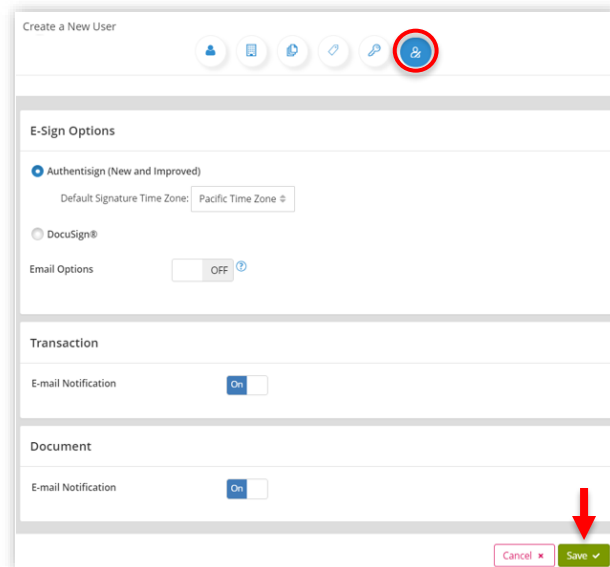
**DocInbox**

- Delete document(s)

## 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  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.



**E-Sign Options**

Authentisign (New and Improved)  
Default Signature Time Zone: Pacific Time Zone

DocuSign®

Email Options:  OFF

**Transaction**

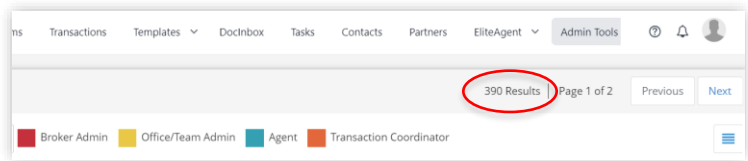
E-mail Notification:  On

**Document**

E-mail Notification:  On

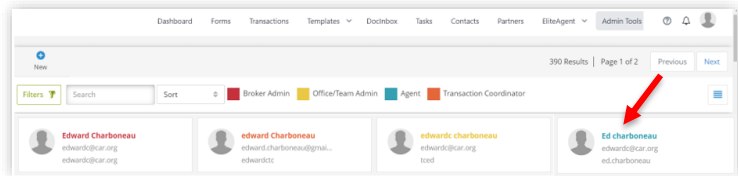
## View the number of Users in your Account

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

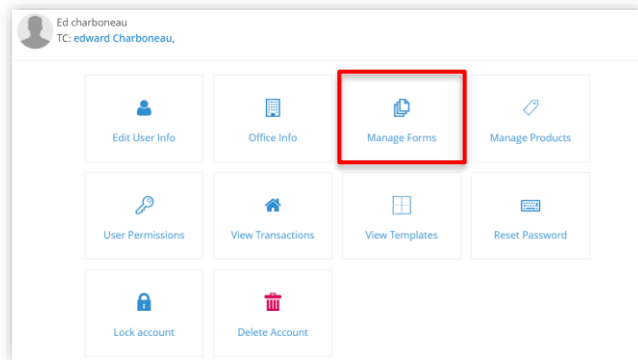


## View the number of Seats available in your Account

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 x to exit the user's profile.

