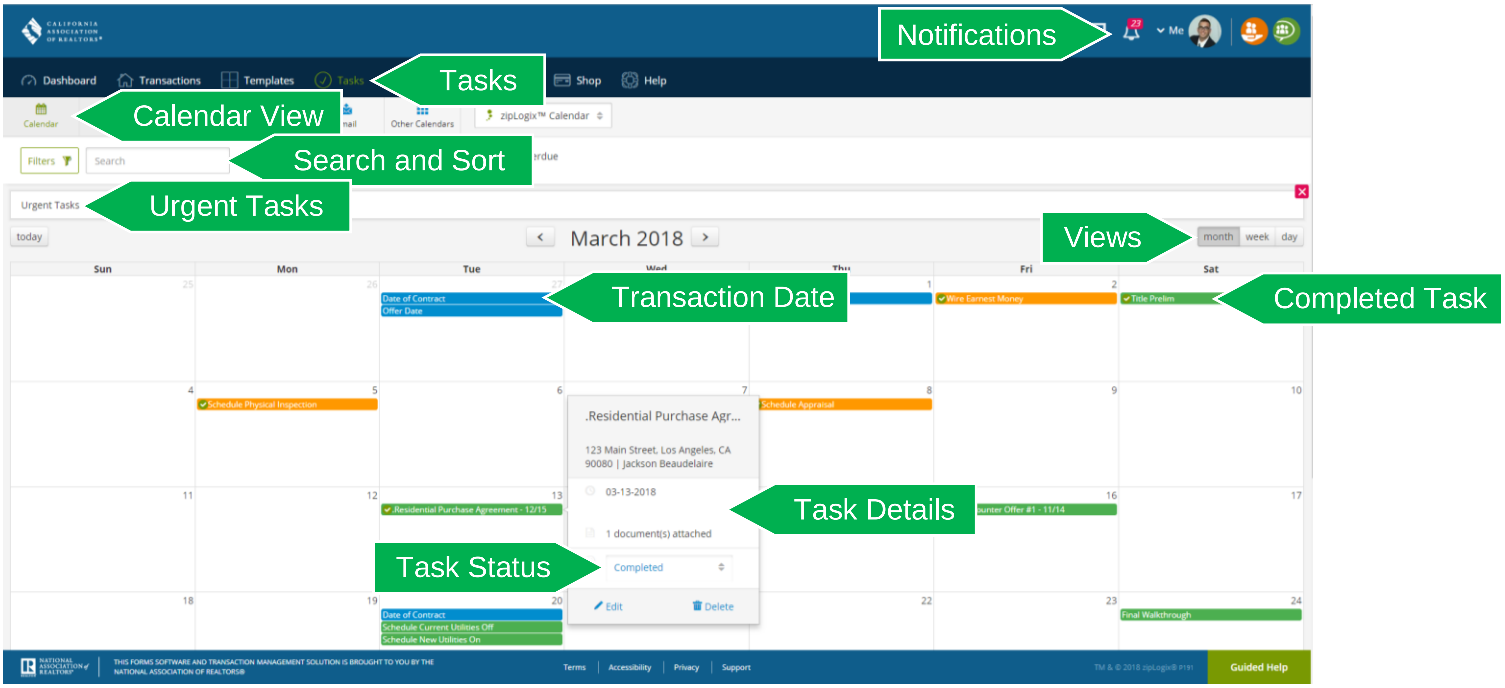
Help at a Glance: zipTMS® Tasks

Secure Online Transaction Management

Keep all of your sales files organized and available anytime. zipTMS® allows you to work with your office, track tasks, complete contracts and manage important documentation from one easy location.



The zipTMS® **Tasks** page provides a comprehensive calendar of important events for every file. Use the **Search and Sort** tools to change between list view and calendar view, view urgent tasks, and instantly find tasks by name or category.

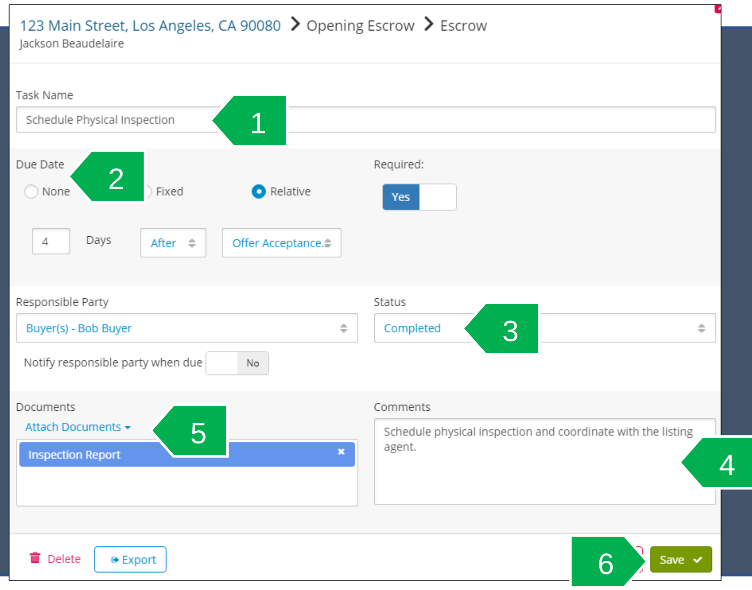
Tasks include due dates, appointments, document deadlines, and template tasks from your transaction files. zipTMS® helps you stay on schedule with your tasks through Notifications and the **Urgent Tasks** list. In addition to the tasks, important **Transaction Dates** are displayed on your calendar or task list. Click to switch the **Calendar View** to Month, Week, or day.

Each **Task** is color-coded, based upon its checklist category, and **Completed Tasks** are easily identified by a green check mark next to the task name. Click on a task name to open any task to view the **Task Details**, or click and drag to change a task due date.

Edit Task

Updates to file tasks are easily managed.

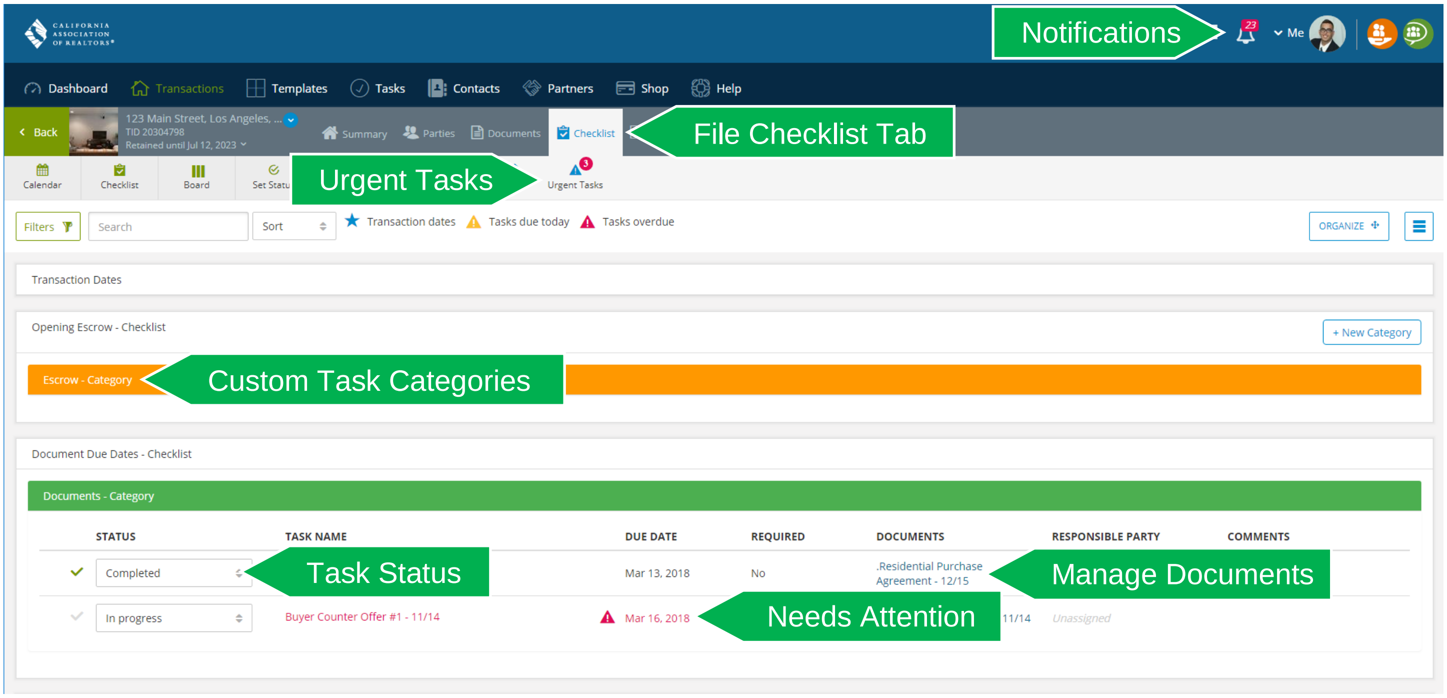
1. Edit the **Task Name**
2. Change the **Due Date**
3. Toggle task **completed** status
   (A **Relative** due date is a date which depends upon a **Transaction Date**)
4. **Add or edit Comments**
5. Remove or **attach Documents**
6. **Save** Changes



zipTMS® File Checklist

Inside the File: Checklist Tab

The Checklist tab is an easy guide to tasks and deadlines for the transaction file. Click the Checklist tab within a transaction file to view the tasks, documents, or calendar for this file.

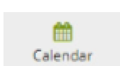


Tools for Managing Tasks and Checklists

Your key to streamlined file management, the task toolbar means time saving tools are just a click away.

New Category

Create a new category for tasks in this file. Categories can be color-coded for easy identification.



View Calendar

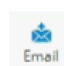
Switch to a calendar view of tasks according to due date.

New Task

Add a task, event, or reminder for something you are working on when viewing a checklist.

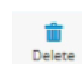
New Checklist

Label a new checklist (set of categories and tasks).



Email

Send a PDF of the checklist as an email attachment to a person of your choosing



Delete

Select individual items, such as tasks or categories in order to delete them.

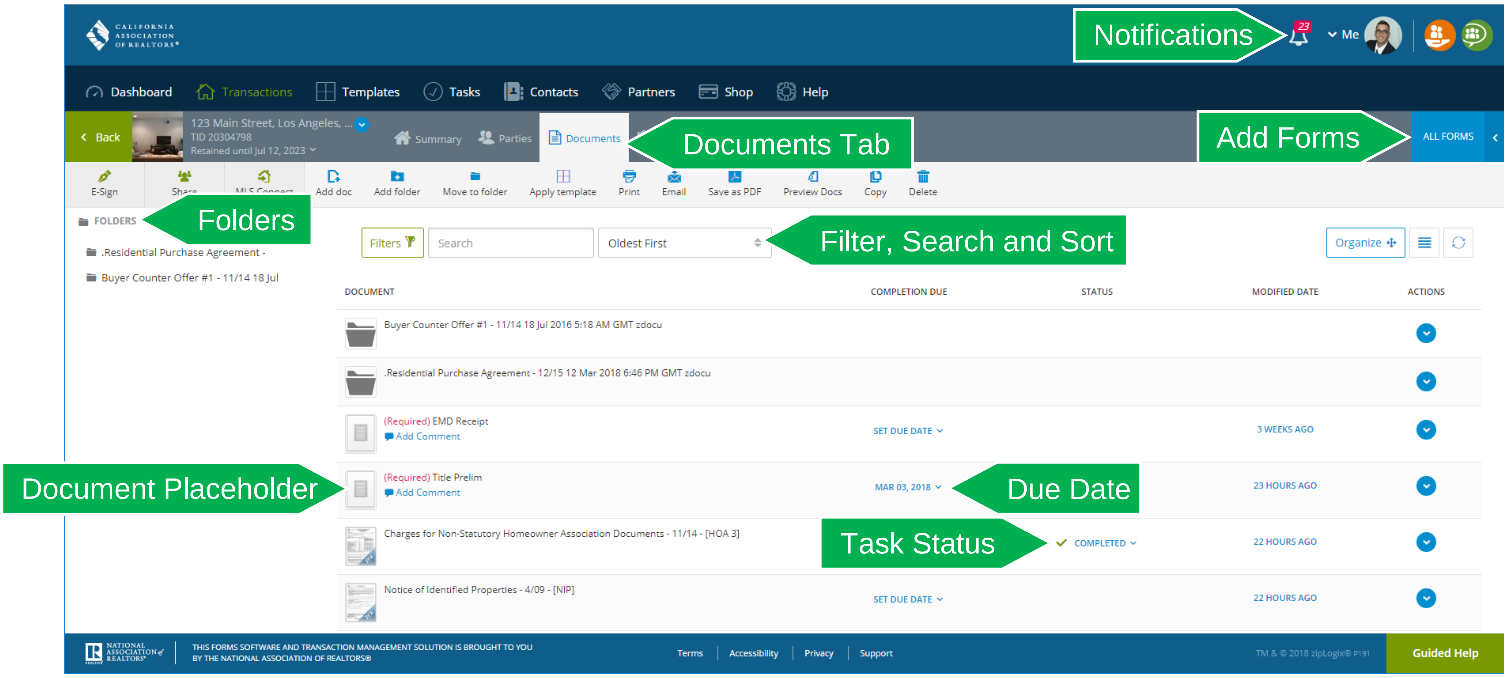
Urgent Tasks

View all of the tasks coming due or past due.

zipTMS® Document Management

Inside the File: Documents

The Documents tab is one central location to manage, store, and share documents and edit zipForm® contracts.



Tools for Managing and Sharing Documents

Instantly send documents, mark for approval, track due dates, or collaborate online.

Apply template

Apply Template

Add a saved standard set of forms, folders, documents, tasks, and contacts. Create your own from the TEMPLATES page.

Add doc

Add Document

Upload a document to store it online with this transaction file.

Save as PDF

Save as PDF

Save a form as a PDF in this file or to your desktop in order to preserve a copy of this form in its current state.

Email

Email

Email or fax documents and forms (as PDFs) to anyone – no special equipment or accounts required.

E-Sign

E-Sign

Send forms or documents for signatures using the eSign service of your choice (pick zipLogix Digital Ink® or DocuSign® in your Profile).

Share

Share

Share forms and documents online with anyone while tracking editing and viewing history.

Copy

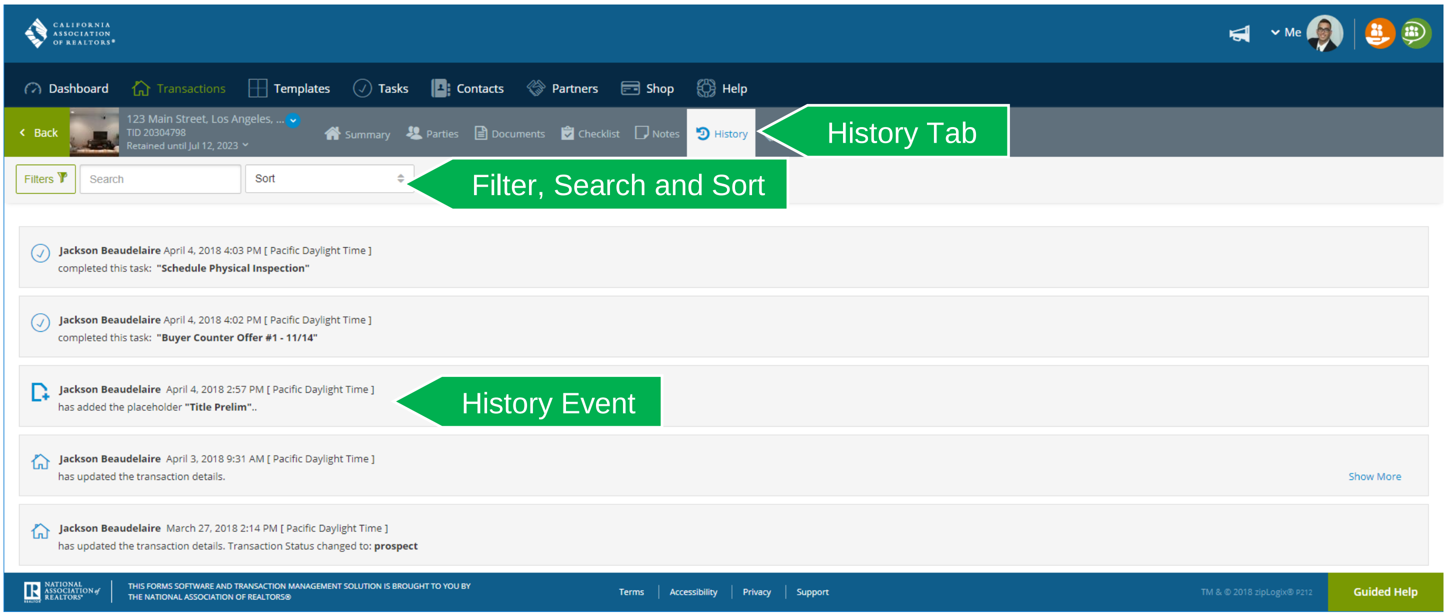
Copy PDF

Copy a PDF document from this file to another transaction file.

zipTMS® History and Notes

Inside the File: History Tab

The **History** tab works 24/7 behind the scenes, tracking important events for a complete transaction record. Add **notes** to complete the communication log for any file.



Instantly **Search and Sort** through the history log to find important events and milestones for this transaction.

Each **History Event** highlights the user's name, event details, and providing additional information, such as the ability to view **Document Status** if a form has been sent for signature with the E-Sign tool.

Add Notes

Track events outside of online transaction activities..

1. Click on the **Notes Tab**
2. Click **New**
3. **Type** note text
4. **Save** Changes