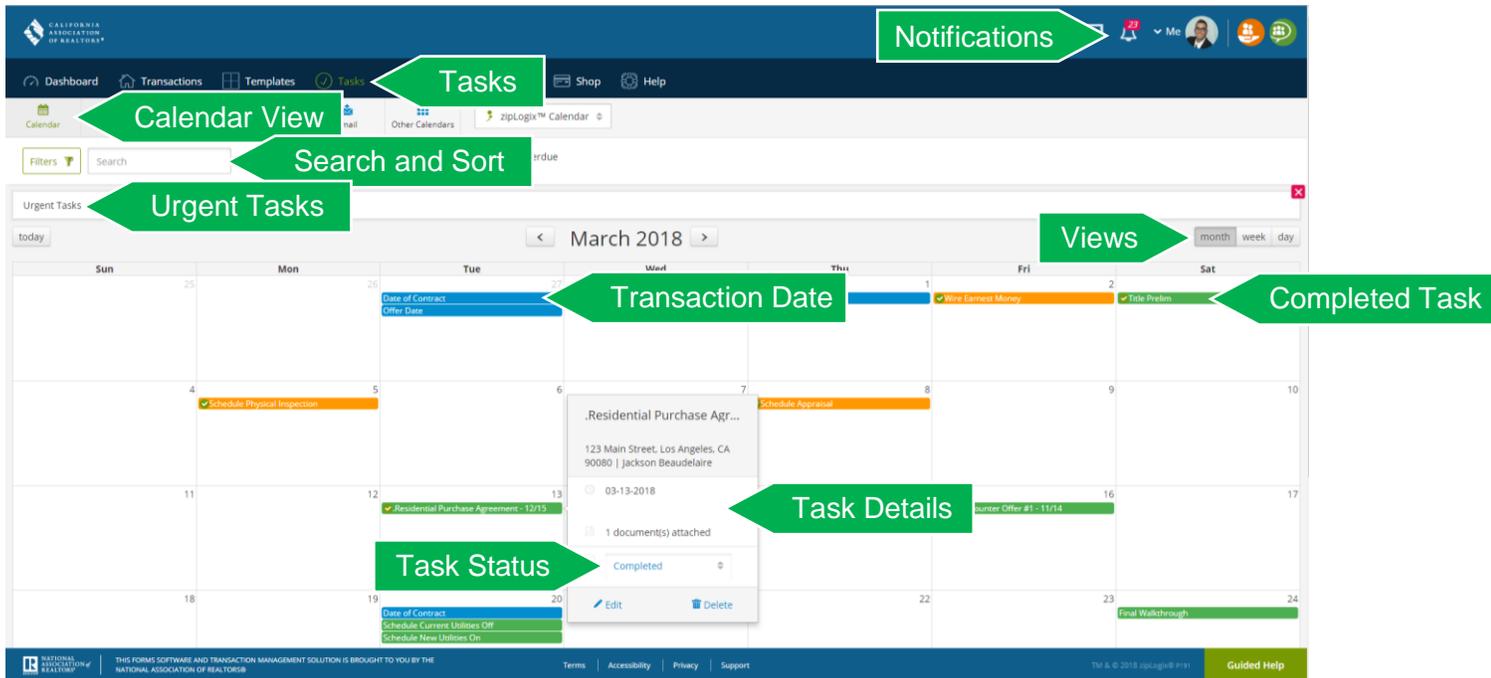


# Help at a Glance: zipTMS® Tasks

## 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**

The 'Edit Task' form is for a task named 'Schedule Physical Inspection'. It includes fields for 'Task Name', 'Due Date' (set to 4 days after Offer Acceptance), 'Required' (Yes), 'Responsible Party' (Buyer(s) - Bob Buyer), 'Status' (Completed), 'Documents' (Inspection Report), and 'Comments' (Schedule physical inspection and coordinate with the listing agent). The form has 'Delete' and 'Export' buttons at the bottom left, and a 'Save' button at the bottom right.

# zipTMS<sup>®</sup> 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.

The screenshot displays the 'File Checklist Tab' interface. At the top, there's a navigation bar with 'File Checklist Tab' highlighted. Below it, there are sections for 'Urgent Tasks', 'Transaction Dates', 'Opening Escrow - Checklist', and 'Document Due Dates - Checklist'. A table lists tasks with columns for Status, Task Name, Due Date, Required, Documents, Responsible Party, and Comments. Callouts point to 'Custom Task Categories', 'Task Status', 'Needs Attention', and 'Manage Documents'.

STATUS	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	COMMENTS
Completed		Mar 13, 2018	No	.Residential Purchase Agreement - 12/15		
In progress	Buyer Counter Offer #1 - 11/14	Mar 16, 2018			11/14 Unassigned	

## ▲ Tools for Managing Tasks and Checklists

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

<b>New Category</b>	<b>View Calendar</b>	<b>New Task</b>	<b>New Checklist</b>	<b>Email</b>	<b>Delete</b>	<b>Urgent Tasks</b>
Create a new category for tasks in this file. Categories can be color-coded for easy identification.	Switch to a calendar view of tasks according to due date.	Add a task, event, or reminder for something you are working on when viewing a checklist.	Label a new checklist (set of categories and tasks).	Send a PDF of the checklist as an email attachment to a person of your choosing	Select individual items, such as tasks or categories in order to delete them.	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.

The screenshot shows the zipTMS interface with several callouts highlighting key features:

- Notifications:** A green arrow points to the notification bell icon in the top right corner.
- Documents Tab:** A green arrow points to the 'Documents' tab in the top navigation bar.
- Add Forms:** A green arrow points to the 'Add Forms' button in the top right corner.
- Folders:** A green arrow points to the 'Folders' section on the left sidebar.
- Filter, Search and Sort:** A green arrow points to the search and sort controls at the top of the document list.
- Document Placeholder:** A green arrow points to a document entry in the list that has a placeholder icon.
- Due Date:** A green arrow points to the 'Due Date' column in the document list.
- Task Status:** A green arrow points to the 'Task Status' column in the document list.

DOCUMENT	COMPLETION DUE	STATUS	MODIFIED DATE	ACTIONS
Buyer Counter Offer #1 - 11/14 18 Jul 2016 5:18 AM GMT zdocu				
.Residential Purchase Agreement - 12/15 12 Mar 2018 6:46 PM GMT zdocu				
(Required) EMD Receipt Add Comment	SET DUE DATE		3 WEEKS AGO	
(Required) Title Prelim Add Comment	MAR 03, 2018		23 HOURS AGO	
Charges for Non-Statutory Homeowner Association Documents - 11/14 - [HOA 3]		COMPLETED	22 HOURS AGO	
Notice of Identified Properties - 4/09 - [NIP]	SET DUE DATE		22 HOURS AGO	

## Tools for Managing and Sharing Documents

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

Apply template	Add doc	Save as PDF	Email	E-Sign	Share	Copy
<b>Apply Template</b>	<b>Add Document</b>	<b>Save as PDF</b>	<b>Email</b>	<b>E-Sign</b>	<b>Share</b>	<b>Copy PDF</b>
Add a saved standard set of forms, folders, documents, tasks, and contacts. Create your own from the TEMPLATES page.	Upload a document to store it online with this transaction file.	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 or fax documents and forms (as PDFs) to anyone – no special equipment or accounts required.	Send forms or documents for signatures using the eSign service of your choice (pick zipLogix Digital Ink® or DocuSign® in your Profile).	Share forms and documents online with anyone while tracking editing and viewing history.	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.

California Association of Realtors

Dashboard Transactions Templates Tasks Contacts Partners Shop Help

Back 123 Main Street, Los Angeles, CA 90080  
TID 20304798  
Retained until Jul 12, 2023

Summary Parties Documents Checklist Notes History History Tab

Filters Search Sort Filter, Search and Sort

- Jackson Beaudelaire April 4, 2018 4:03 PM [ Pacific Daylight Time ] completed this task: "Schedule Physical Inspection"
- Jackson Beaudelaire April 4, 2018 4:02 PM [ Pacific Daylight Time ] completed this task: "Buyer Counter Offer #1 - 11/14"
- Jackson Beaudelaire April 4, 2018 2:57 PM [ Pacific Daylight Time ] has added the placeholder "Title Prelim".. History Event
- Jackson Beaudelaire April 3, 2018 9:31 AM [ Pacific Daylight Time ] has updated the transaction details. Show More
- Jackson Beaudelaire March 27, 2018 2:14 PM [ Pacific Daylight Time ] has updated the transaction details. Transaction Status changed to: prospect

NATIONAL ASSOCIATION OF REALTORS® THIS FORMS SOFTWARE AND TRANSACTION MANAGEMENT SOLUTION IS BROUGHT TO YOU BY THE NATIONAL ASSOCIATION OF REALTORS® Terms Accessibility Privacy Support TM & © 2018 zipLogix® P212 Guided Help

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**

California Association of Realtors

Feedback Guided Help

Dashboard Transactions Templates Tasks Contacts Partners ... More

Back 123 Main Street, Los Angeles, CA 90080  
TID 20304798  
Retained until Jul 12, 2023

Summary Parties Documents Checklist Notes Services

New Save as PDF Print Notes

Jackson Beaudelaire 04/05/2018 9:20 AM

Listing Agent Just got the termite bid. They are going with the secondary option (local treatment . Termite company will provide a clearance certificate. |