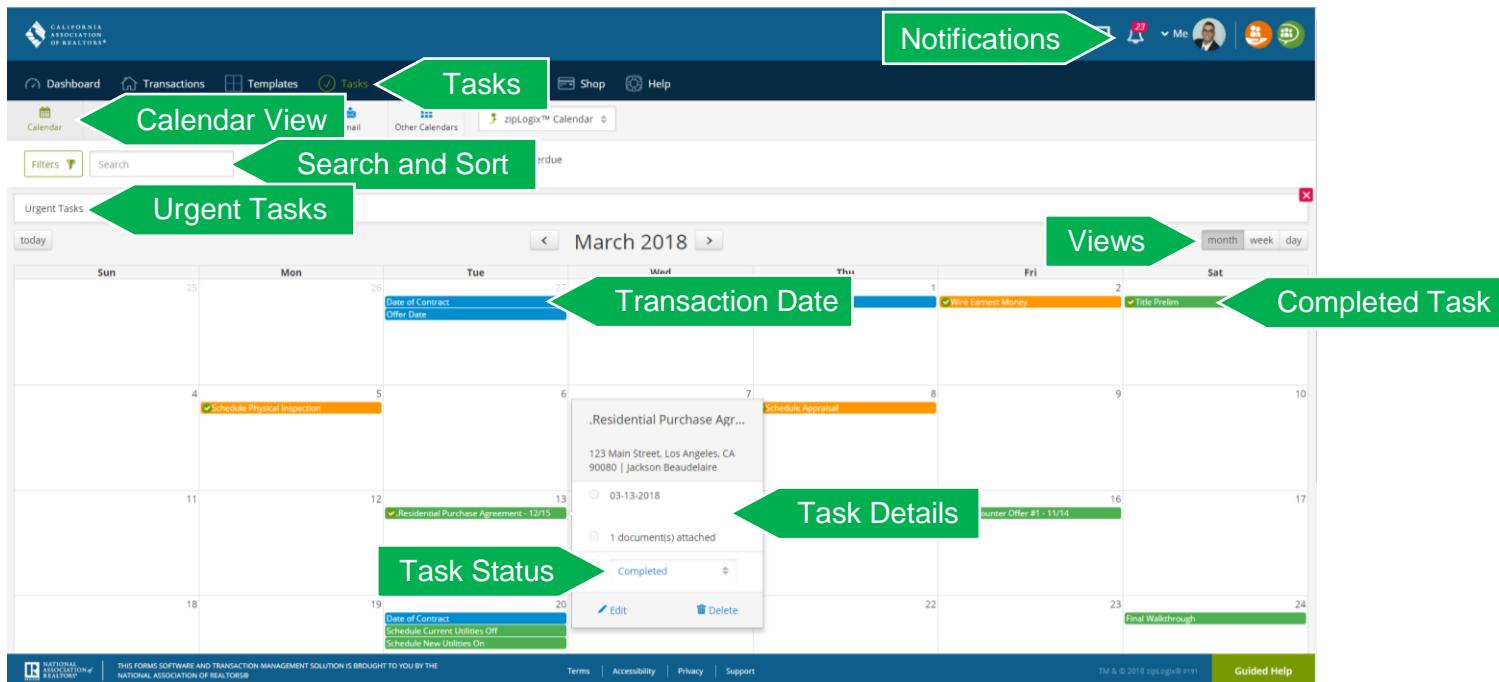


# Help at a Glance: zipTMS® Tasks

## 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**

123 Main Street, Los Angeles, CA 90080 > Opening Escrow > Escrow  
Jackson Beaudelaire

Task Name: Schedule Physical Inspection

Due Date: None Fixed Relative Yes

Required: Yes

Days: 4 After Offer Acceptance

Responsible Party: Buyer(s) - Bob Buyer

Status: Completed

Notify responsible party when due: No

Comments: Schedule physical inspection and coordinate with the listing agent.

Documents: Attach Documents Inspection Report

Comments: Schedule physical inspection and coordinate with the listing agent.

Delete Export

Save

# 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.

Notifications

File Checklist Tab

Urgent Tasks

Custom Task Categories

Task Status

Manage Documents

Needs Attention

## ► Tools for Managing Tasks and Checklists

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

<a href="#">+ New Category</a>	<a href="#">Calendar</a>	<a href="#">Create a new task</a>	<a href="#">New Checklist</a>	<a href="#">Email</a>	<a href="#">Delete</a>	<a href="#">Urgent Tasks</a>
<b>New Category</b> Create a new category for tasks in this file. Categories can be color-coded for easy identification.	<b>View Calendar</b> Switch to a calendar view of tasks according to due date.	<b>New Task</b> Add a task, event, or reminder for something you are working on when viewing a checklist.	<b>New Checklist</b> Label a new checklist (set of categories and tasks).	<b>Email</b> Send a PDF of the checklist as an email attachment to a person of your choosing	<b>Delete</b> Select individual items, such as tasks or categories in order to delete them.	<b>Urgent Tasks</b> 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 Document Management interface. At the top, there's a navigation bar with links for Dashboard, Transactions, Templates, Tasks, Contacts, Partners, Shop, and Help. A green arrow labeled "Documents Tab" points to the "Documents" link in the top navigation. Another green arrow labeled "Add Forms" points to the "Add Forms" button. On the left, a sidebar has a green arrow labeled "Folders" pointing to the "Folders" section. A green arrow labeled "Filter, Search and Sort" points to the filter and search tools at the top of the document list. A green arrow labeled "Due Date" points to the due date column in the document grid. A green arrow labeled "Task Status" points to the task status column. A green arrow labeled "Document Placeholder" points to a placeholder area on the left. The main content area displays a list of documents with columns for DOCUMENT, COMPLETION DUE, STATUS, MODIFIED DATE, and ACTIONS. At the bottom, there are links for Terms, Accessibility, Privacy, Support, and Guided Help.

## 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 PDF
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.

The screenshot shows the zipTMS software interface. At the top, there's a navigation bar with links for Dashboard, Transactions, Templates, Tasks, Contacts, Partners, Shop, and Help. Below the navigation bar, a breadcrumb trail shows 'Back' and the address '123 Main Street, Los Angeles, CA 90080'. A dropdown menu indicates 'Retained until Jul 12, 2023'. The main content area is titled 'History Tab' and contains a 'Filter, Search and Sort' bar. Below this, a list of 'History Events' is displayed, each with a timestamp, user name, event details, and a small icon. One event is highlighted with a green arrow pointing to it, labeled 'History Event'. At the bottom of the page, there are footer links for Terms, Accessibility, Privacy, Support, and 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**

The screenshot shows the zipTMS software interface. At the top, there's a navigation bar with links for Dashboard, Transactions, Templates, Tasks, Contacts, Partners, and More. Below the navigation bar, a breadcrumb trail shows 'Back' and the address '123 Main Street, Los Angeles, CA 90080'. A dropdown menu indicates 'Retained until Jul 12, 2023'. The main content area is titled 'Notes' and shows a list of notes. One note is highlighted with a green arrow pointing to it, labeled '3'. Another note is highlighted with a green arrow pointing to its content, labeled '4'. The note content reads: 'Jackson Beaujelair 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.' There are also buttons for 'New', 'Save as PDF', and 'Print Notes'.