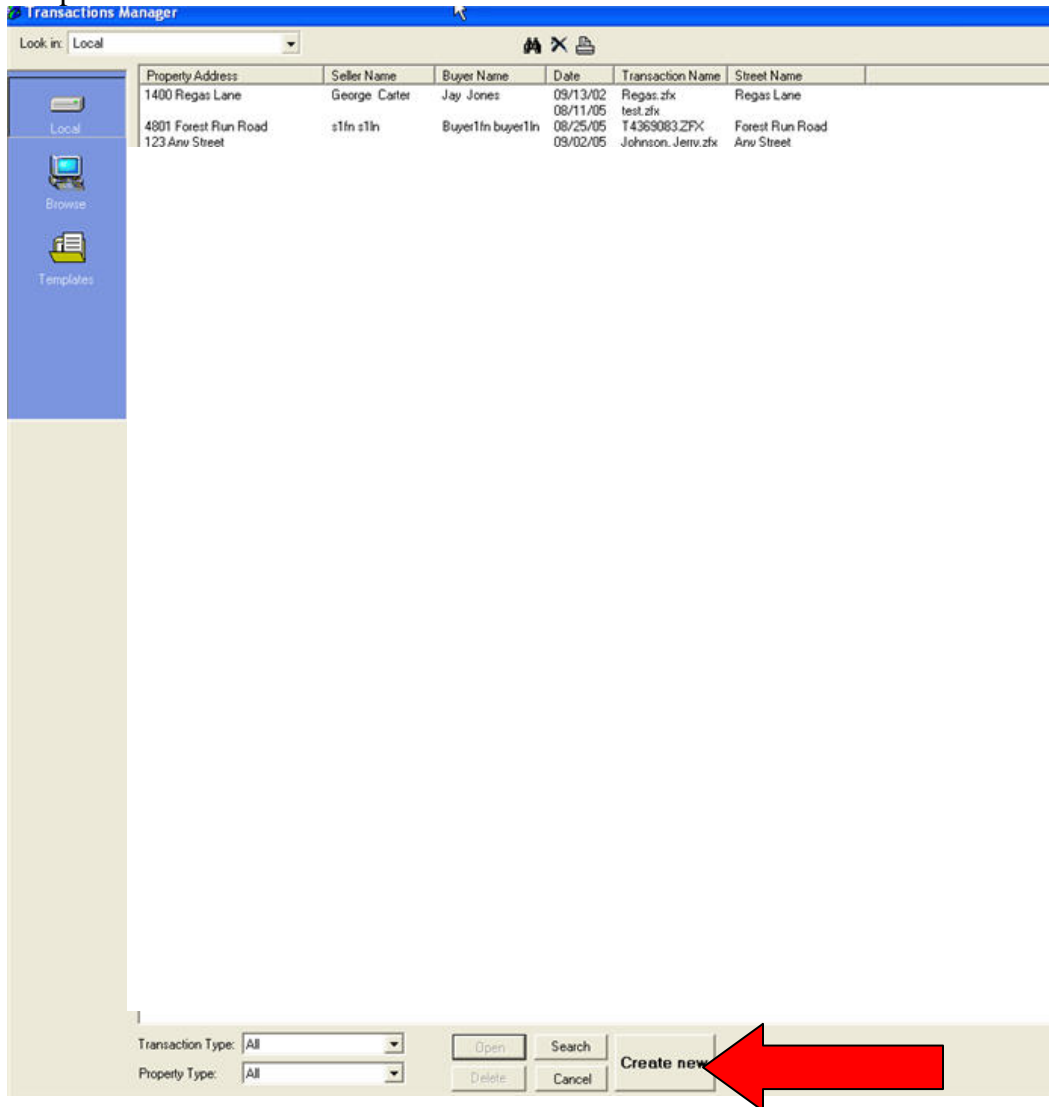


Creating a Transaction in ZipForm Desktop

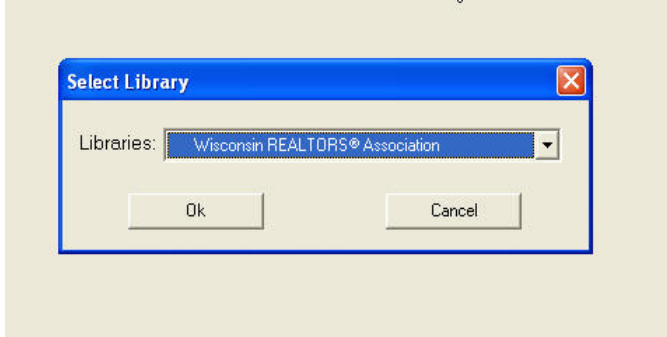
To use ZipForm you will need to create a transaction. A transaction is a file containing all the forms you use when working with a party to list or sell their home.

Follow these steps to create a transaction:

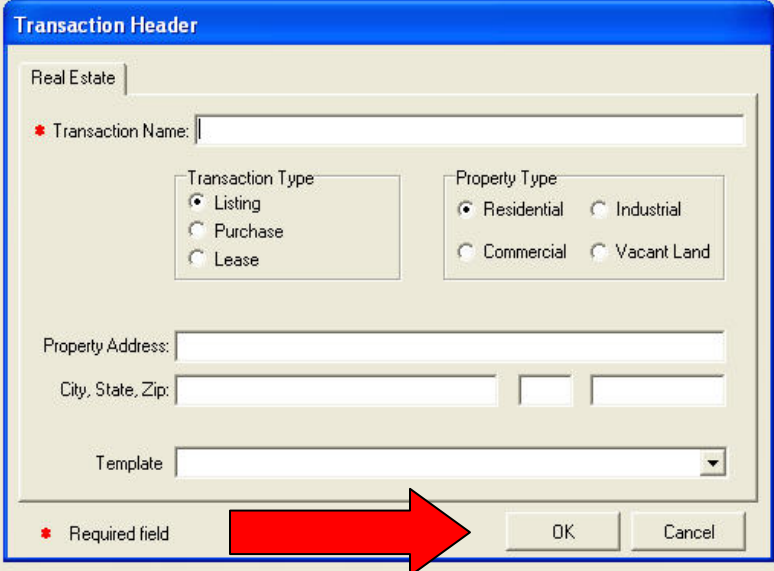
- 1) Log in to ZipForm Desktop
- 2) The **Transaction Manager** is the first screen to open once you log into ZipForm. This is where you manage all your transactions – create, delete, and open for editing. Select Create New. Note: By clicking the printer icon at the top of this window you can print a blank form.



- 3) Select the library you want to use. If you downloaded a custom company library you will see both your company library and the WRA library.

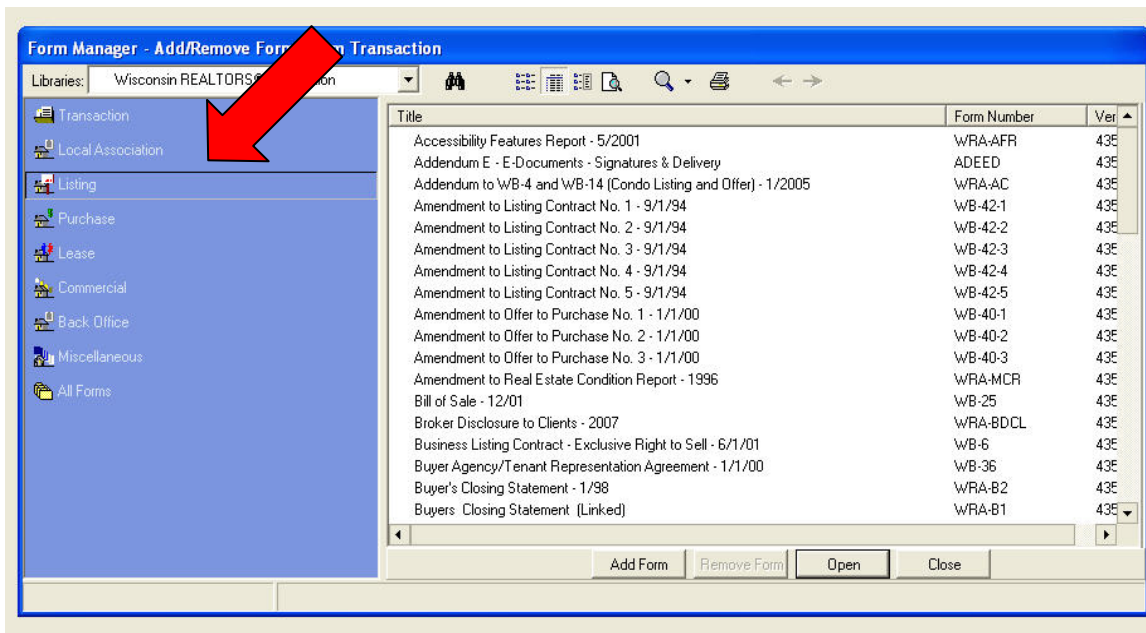


- 4) When the **Transaction Header** appears, enter a name for your transaction, choose the type of transaction you are creating (listing, purchase or lease), select the type of property (residential, commercial, industrial, vacant land), and enter the basic property information (address, party names). Templates you created and wish to use may be selected at this point also. NOTE: The transaction name will print in the lower right corner of your forms. Click OK.



- 5) The **Forms Manager** will open next. The Forms Manager allows you to: view forms in organized categories, show the forms that you have selected for each transaction, add/remove forms from the transaction, select a form library (WRA or a company's custom library), and open forms for editing. Click the form category and scroll through the forms. When you find a form you want to add, highlight the name of the form by clicking on it and select Add Form. Repeat this process to add all the forms you want to the transaction. Click Open when finished adding forms.

- Cover Sheet - It is highly recommended that you include the Wisconsin REALTORS Association Cover Sheet as one of the forms in your transactions. The data on the Cover Sheet will flow to the other forms in the transaction thereby reducing the amount of time spent retyping data. It also provides a single place to look at basic information about the transaction.



6) Complete the forms by tabbing from field to field. Start with the Cover sheet. Press the Esc key to undo any mistyped information. Note: Forms can be added or deleted from the transaction at any time by simply clicking the Add/Remove Form icon in the toolbar.

- Types of Fields:

1. Lookup lists: ZipForm Desktop keeps a record of entries on certain data fields in your forms, such as city names, states, etc. in an easy-to-access drop-down list. When you activate a field such as City, you can “look up” cities you have already used by clicking the drop-down arrow and selecting the appropriate city. Note: To edit lookup lists go to the Tools menu, selection Options > Lookup. Find and select the lookup tag related to the entry you want to edit.
2. Auto format fields: Certain fields will auto format information to the most commonly used format. These fields include phone numbers, money, percentages, dates, social security numbers. Note: Pressing the space bar in a preformatted field (i.e. dollar, percentage, calendar fields) will clear the field formatting and allow text to be entered.
3. Check Box fields: You can mark boxes either by pressing the space bar or by clicking the mouse on it.

7) To **Save the Transaction** to ZipForm’s default location (C:/Windows/Application Data/RE FormsNet/Depot/Local/Master(or another password)) press the disk icon on the toolbar. If you would like to save to another location select the **Save Transaction As** option from the file menu.

8) Printing: ZipForm offers several options for printing a transaction – print current form, print all forms, print sample form, and print blank form. Make a selection from the file menu or click the arrow next to the print icon in the toolbar for a list of options.