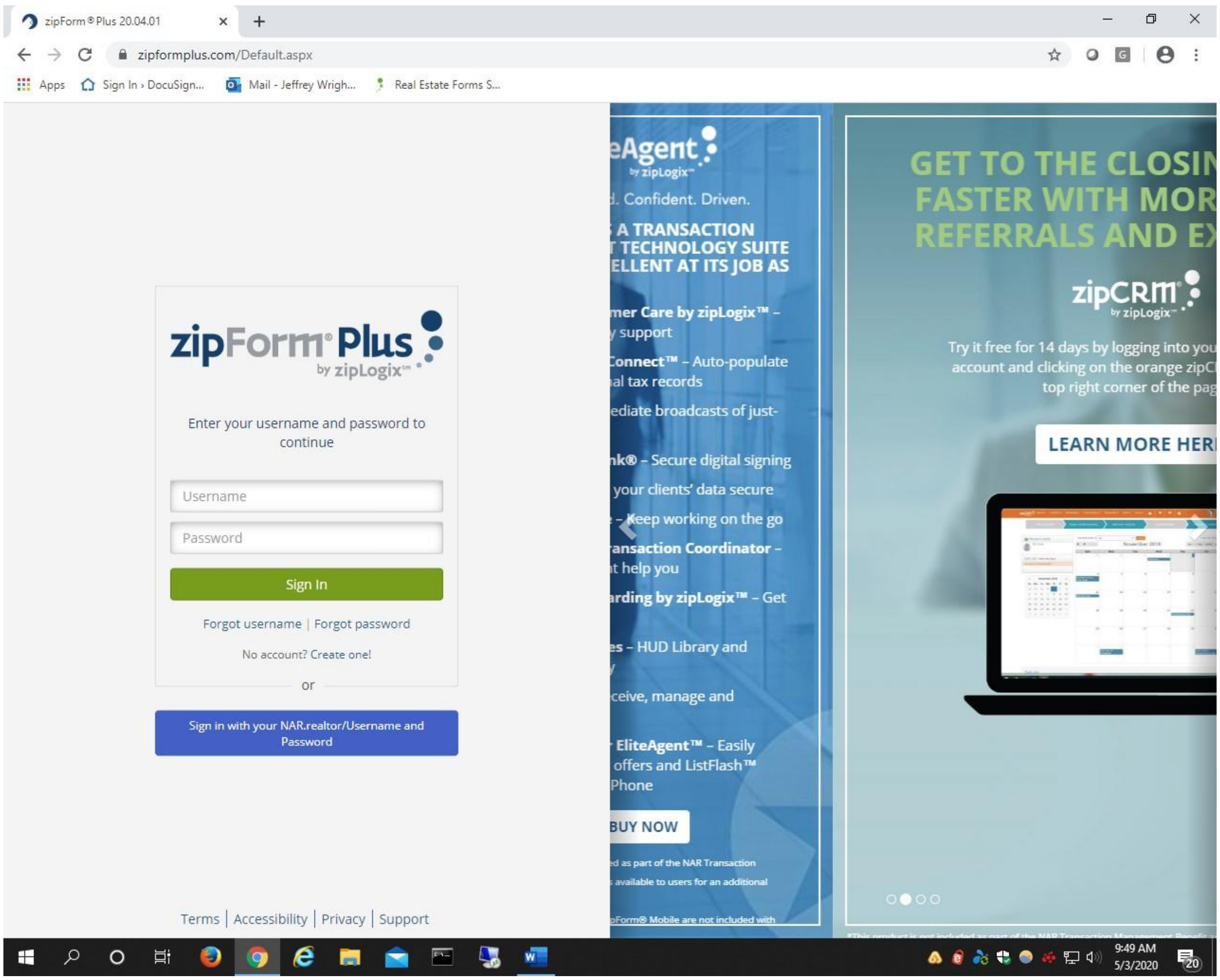
Zip Logix Listing Transaction Process

A Listing from Start to Finish

1. Log in to Zip Logix (www.zipformsplus.com).



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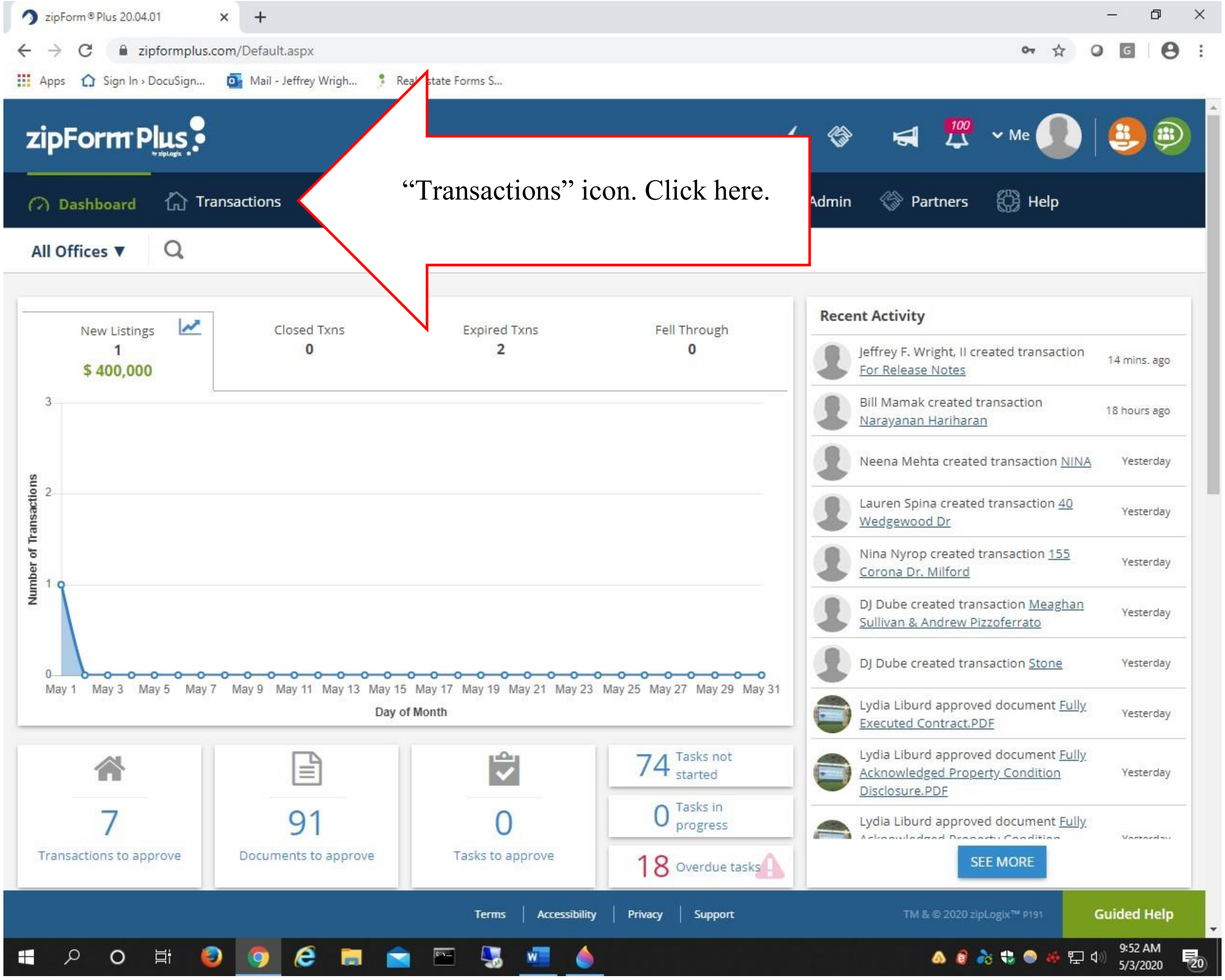
2. Depending on how you have set up your profile you will either have the "Dashboard" as your home page, or you will have "Transactions" as your home page. Either way, you will need to be in "Transactions" to create a new transaction. If your home page is indeed the "Dashboard," click on the "Transactions" icon.



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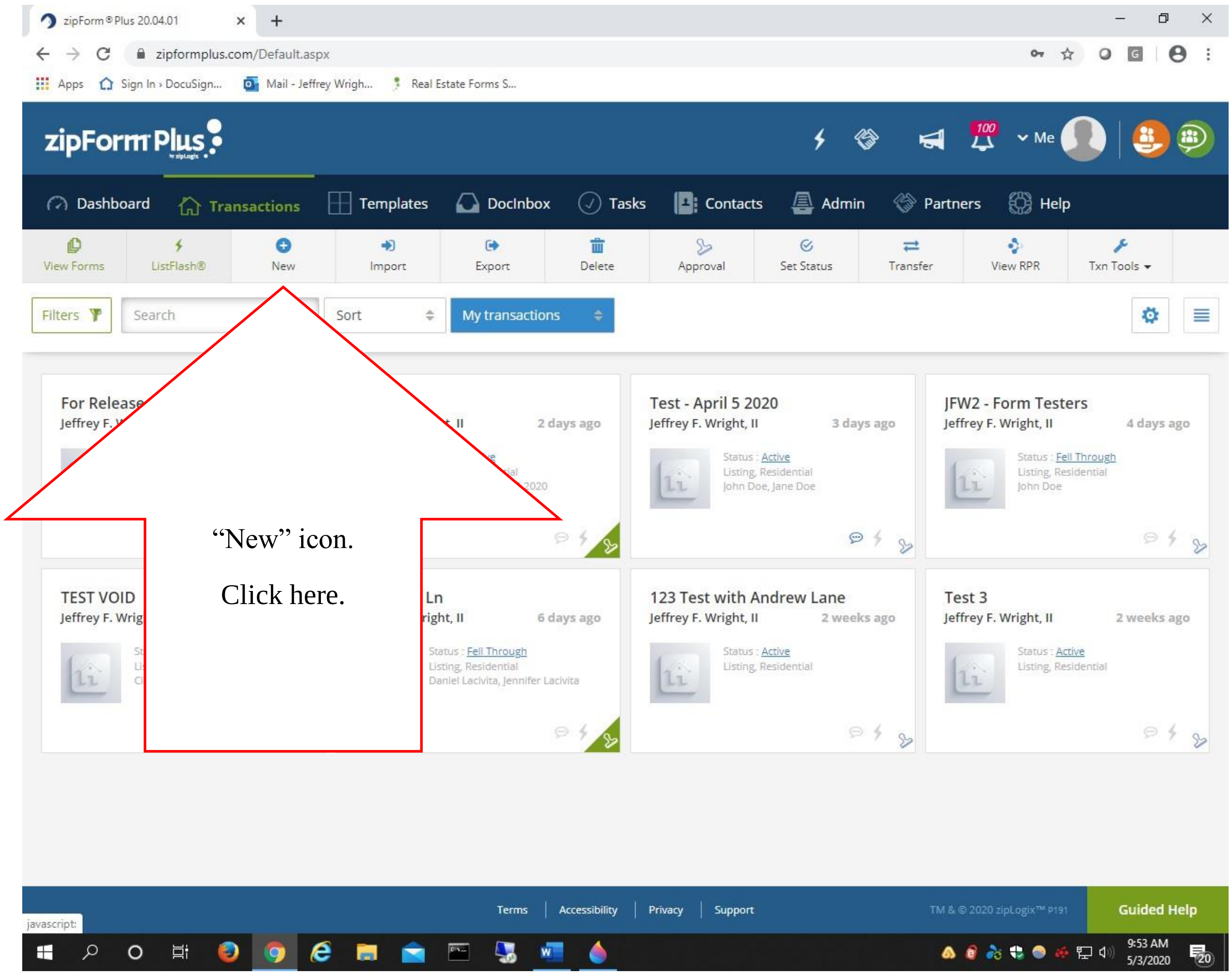
3. Click on the “New” icon to start the process of creating a new transaction.



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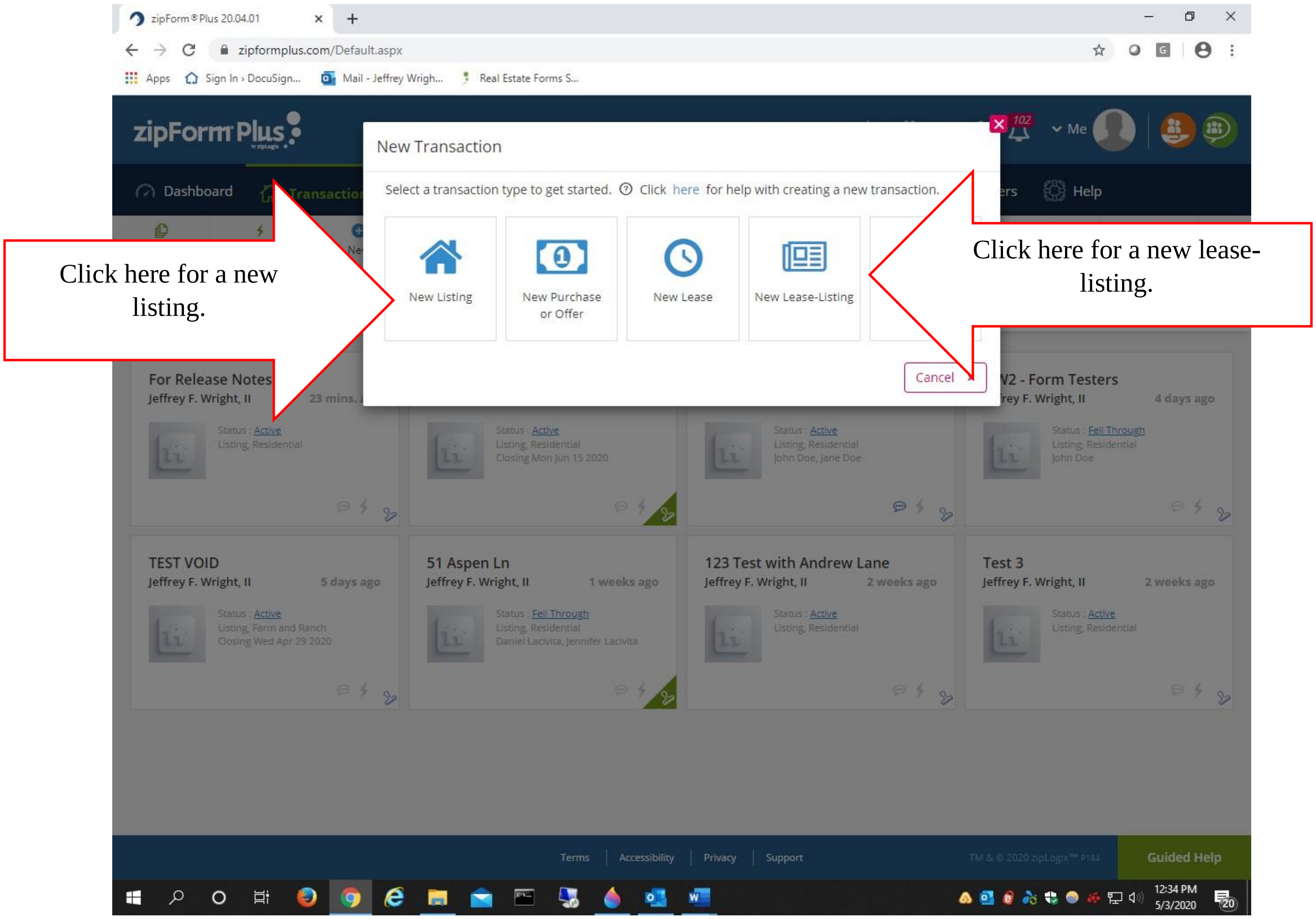
4. Choose the type of transaction you are creating. As this is the process for a listing, you should choose “New Listing” or “New Lease-Listing.”



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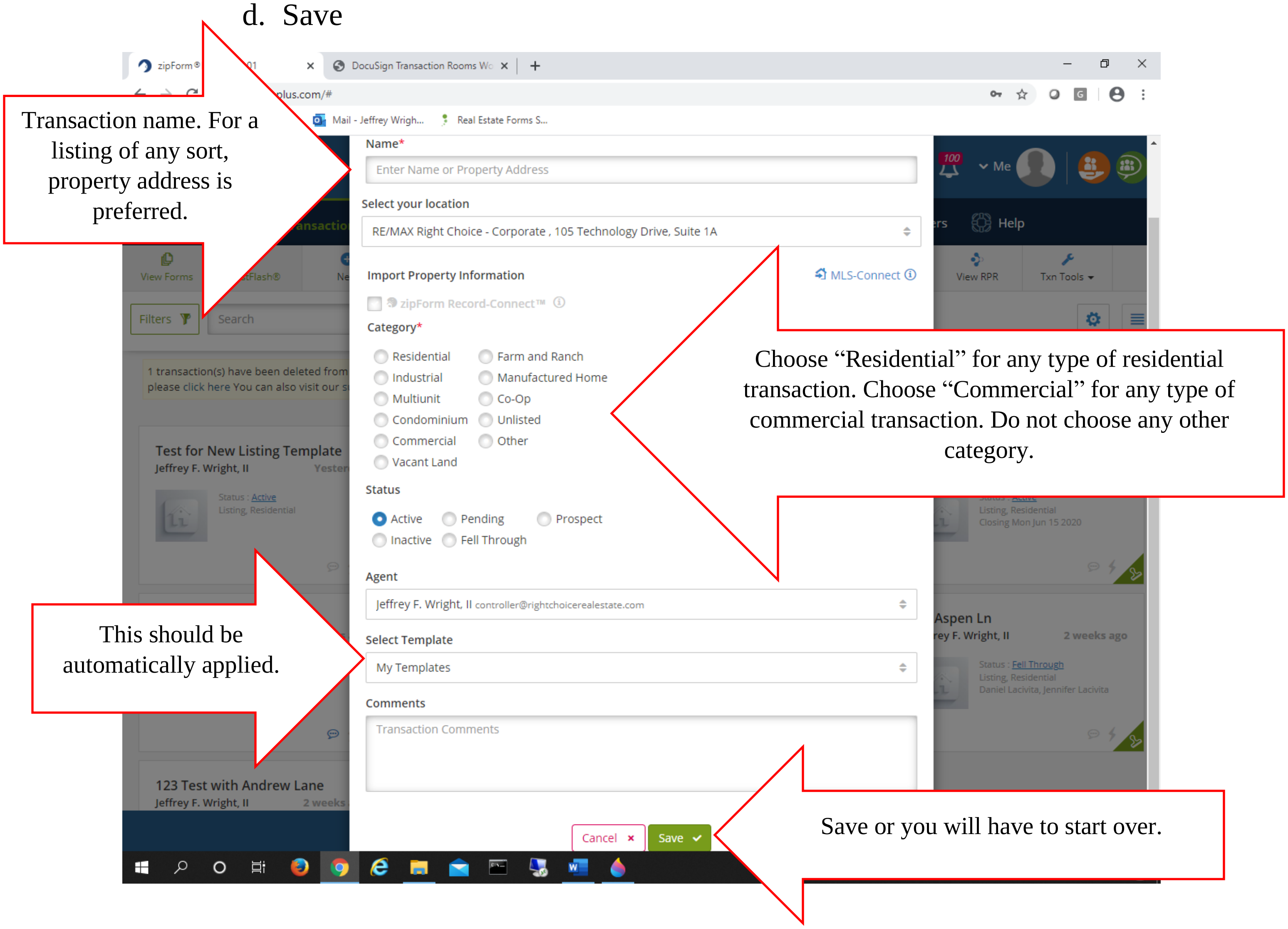
5. Fill out the basics of your transaction.
    a. Transaction Name (Property address is recommended and preferred.)
    b. Category
    c. Template (Should be automatically applied.)
    d. Save



*Note: There are other functions available on this page such as adding an image, MLS-Connect, and Record-Connect. These functions are all helpful but unnecessary for a quick start. Other options you see in this photo are because I am an administrator, and this is what I see. You will not see these options.

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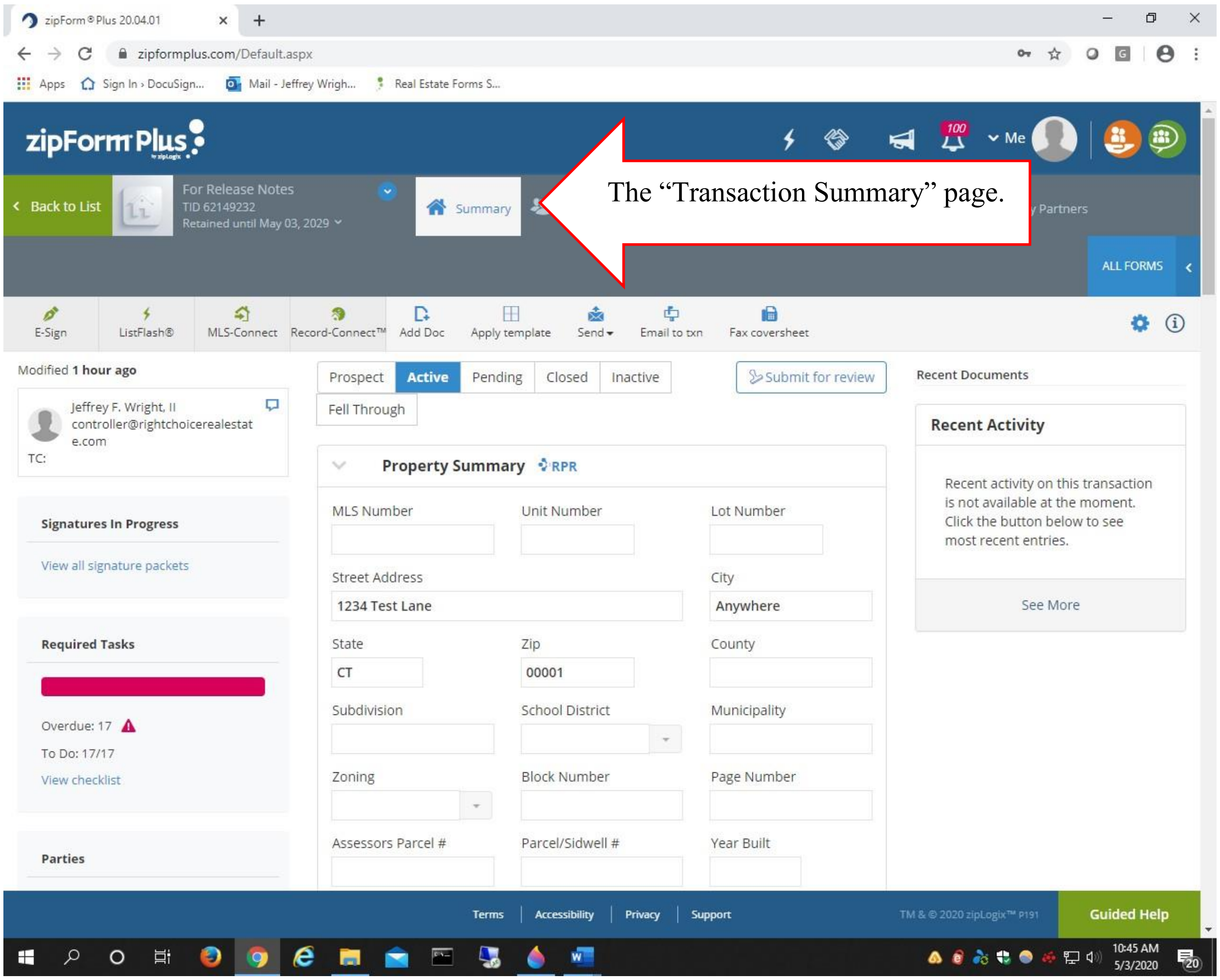
6. When you click “Save” your transaction will be created and you will be brought to the Transaction Summary page.



*Note: You can always tell where you are in a transaction by which icon is highlighted in a light gray box. In this case, you are on the transaction summary page as the “Summary” icon is highlighted.

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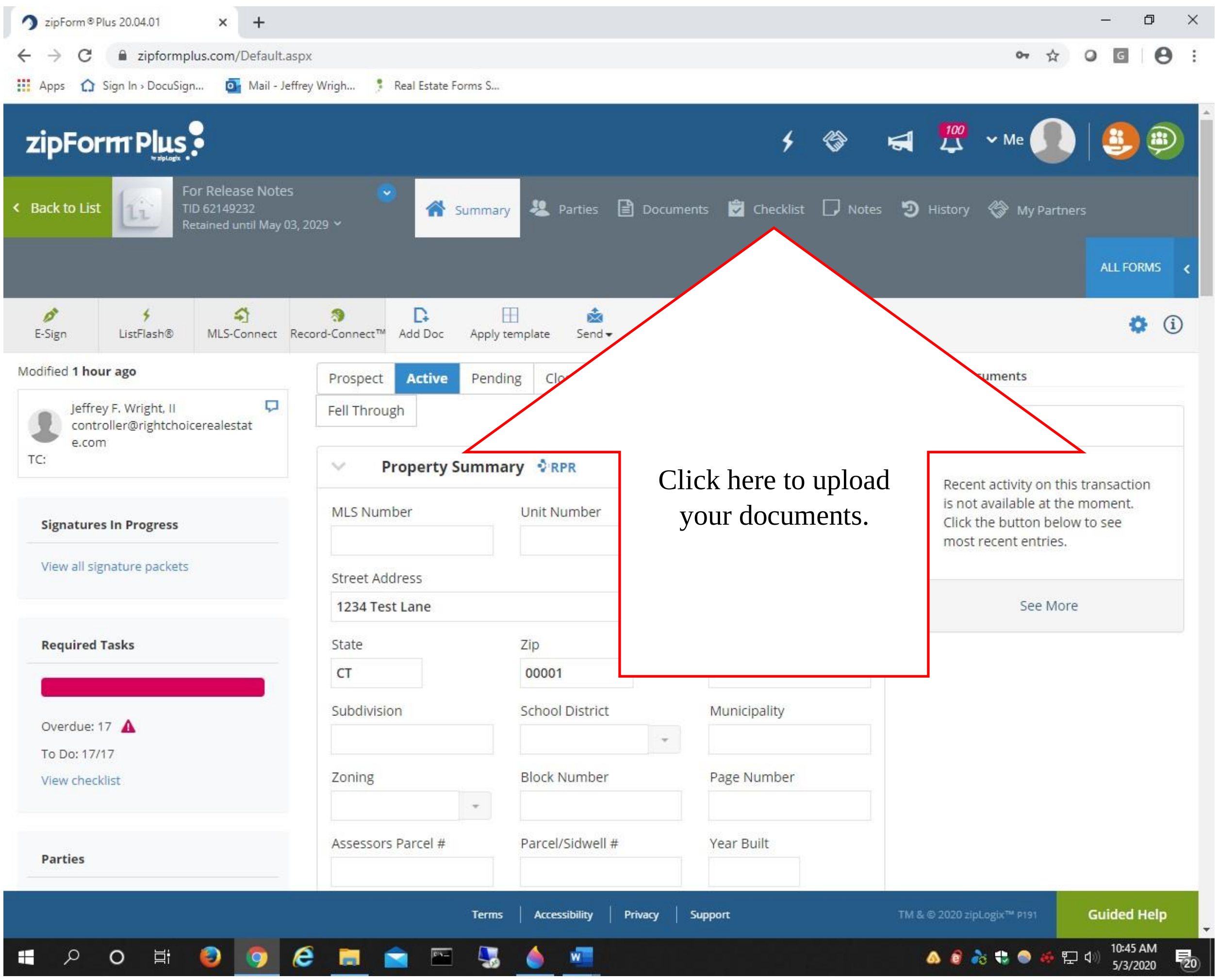
**For the rest of this guide, we will be using a Residential Listing. The process is virtually the same for any other transaction you will do.*

7. Upload all required listing documents and any other pertinent information. You will do this from the "Checklist" we have created to ensure that we have the proper documentation necessary for compliance with Connecticut state law and E&O Liability protection.



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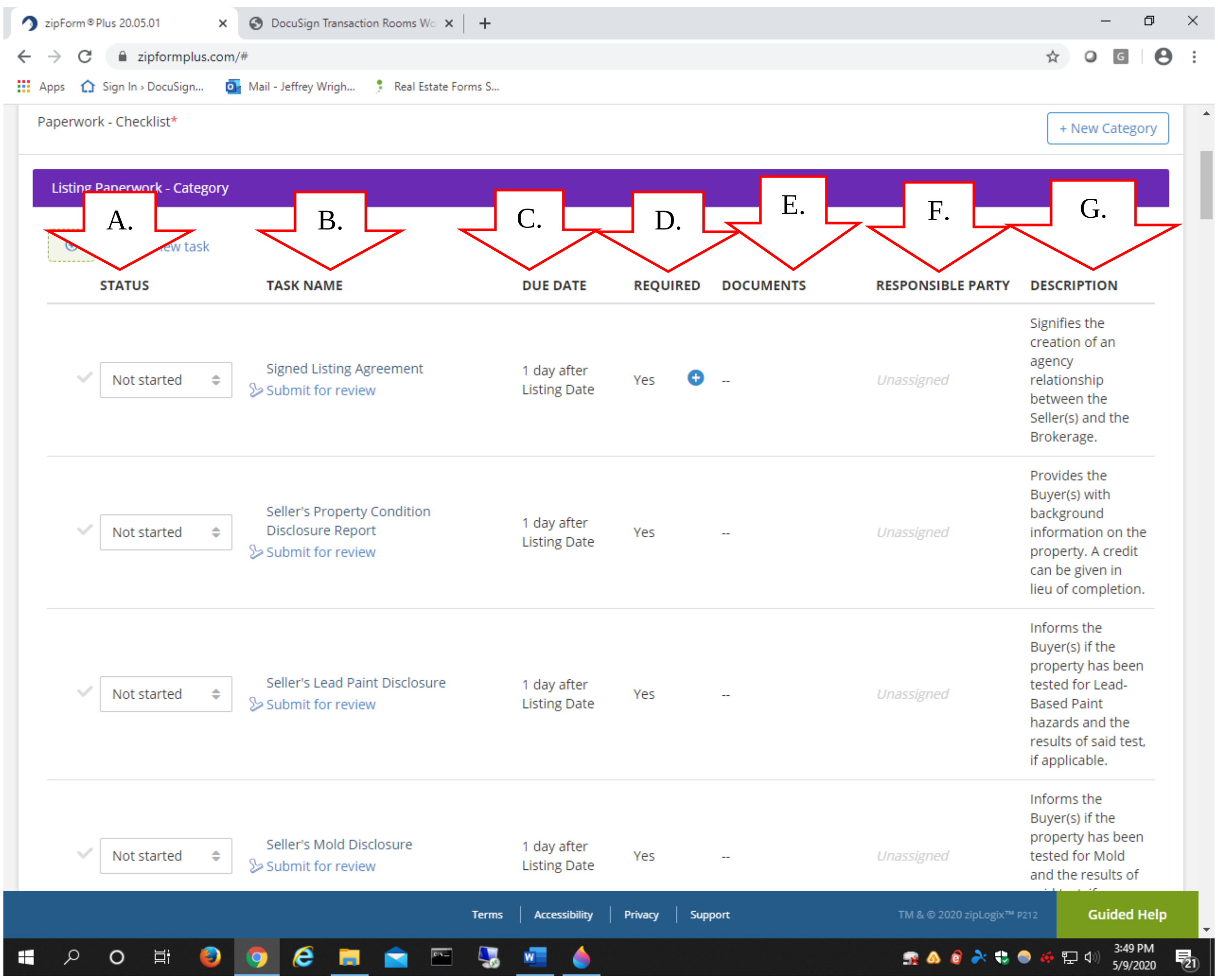
8. On the “Checklist” page you will see one long checklist with three (3) different categories: Listing, Transaction, and Show Me the Money. We will start with Listing paperwork since this is where we are in the process. On this page there are several things to take note of:
    a. Status – Where are you in the process of completing this task?
    b. Task Name – What document do you need to upload here?
    c. Due Date – When should you upload this document?
    d. Required – *We made them all required.
    e. Documents – When you upload a document its name will show here.
    f. Responsible Party – You, the agent, are responsible.
    g. Description – In case you do not know what something is.



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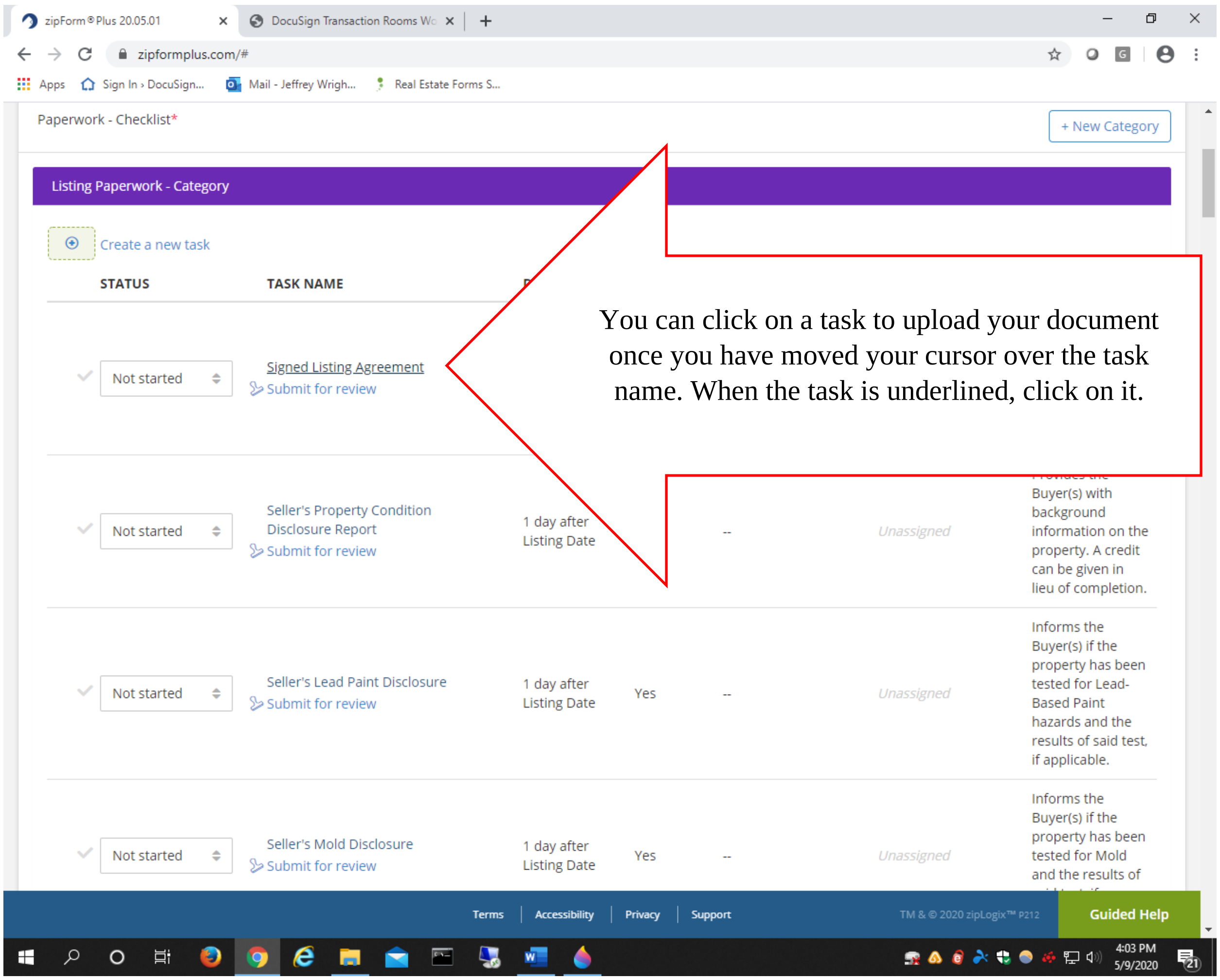
9. To upload a document, scroll through the checklist to find the Task which is associated with your document. Place your cursor over the task name and when the correct task is underlined, click on the task.



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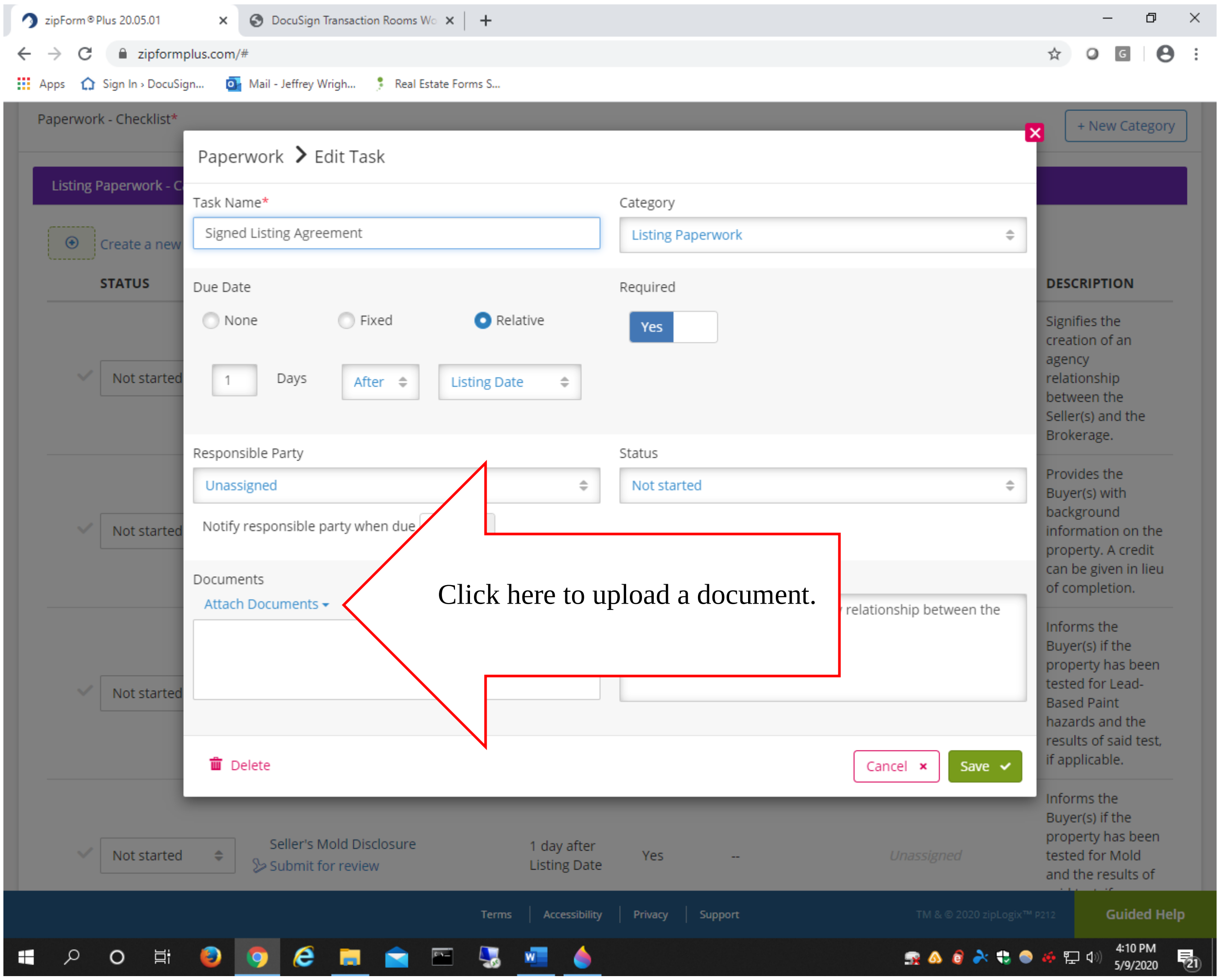
10. The upload screen has an expanded view of the information that can be found on the checklist. In the bottom left-hand corner of the screen you can attach a document.



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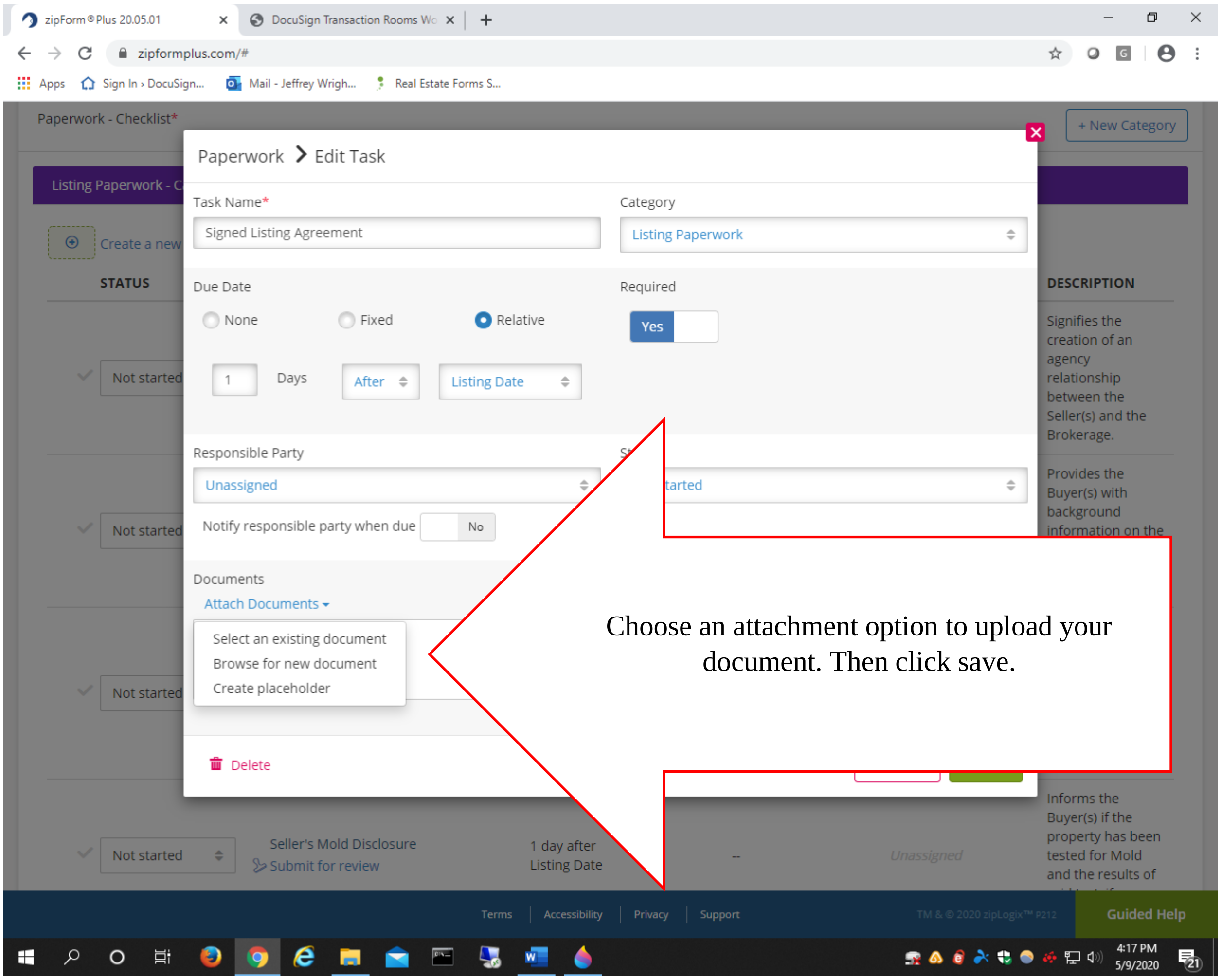
11. You will be able to choose a document from multiple places:
    a. Select an existing document – A document you already have in your transaction (including Fillable forms).
    b. Browse for new document – Uploading a document from your computer, google drive, Dropbox, etc.
    c. Create Placeholder – **Do not use this option.** Thank you.



*To ensure clarity for all, your document should be named as a combination of the task and the property address. Ex. Signed Listing Agreement – 123 Main Street, Trumbull.

Repeat this process for each document you need to upload.

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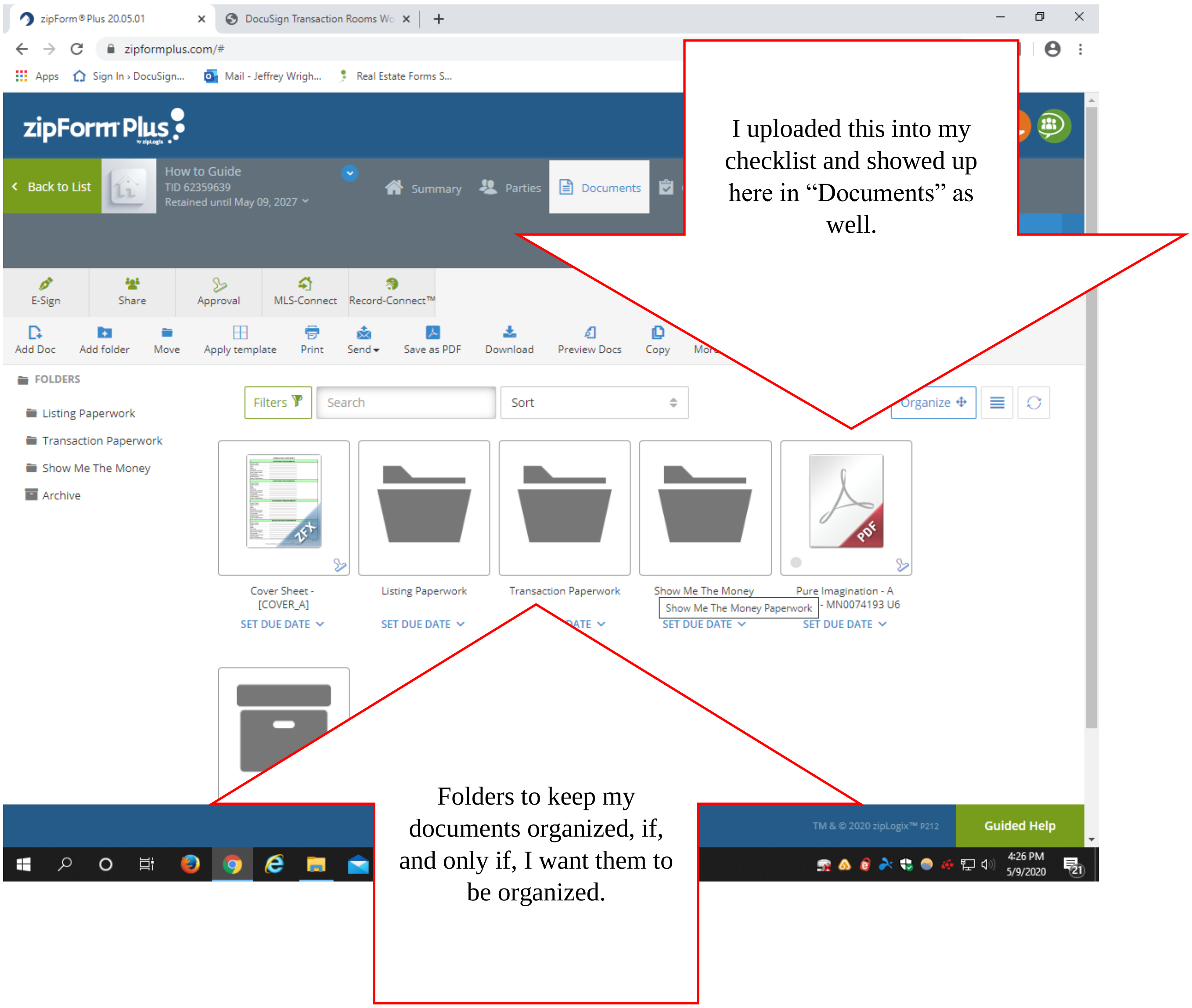
**An Aside: Any document you upload to a task in the checklist will automatically end up in the "Documents" section of the transaction as well.*

You may also notice that in the Documents section we have created several folders for you to toss your documents into so you don't get overwhelmed by the sheer amount of information that may end up here.



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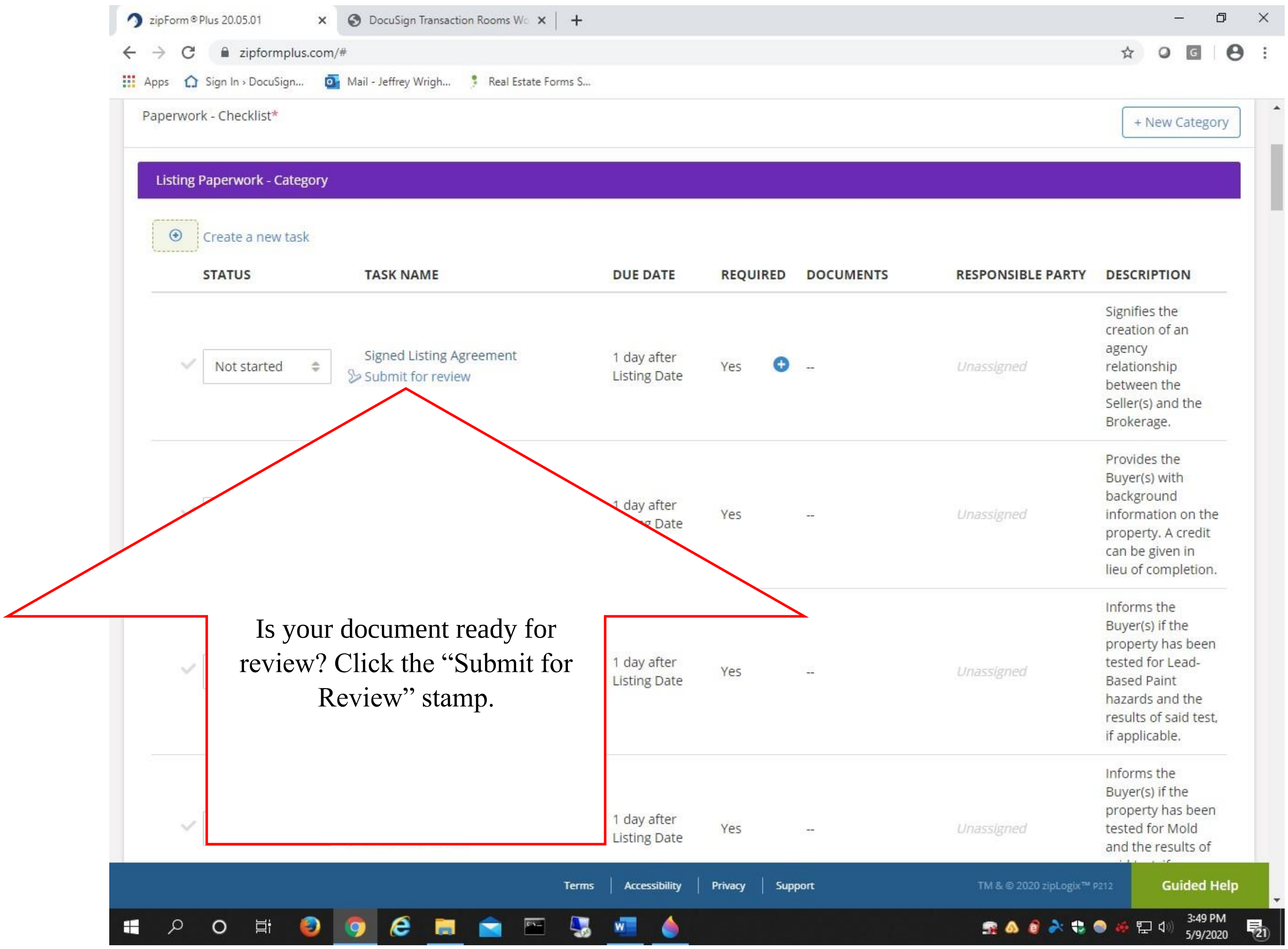
12. After uploading your document, click the "Submit for Review" stamp located below the task name.



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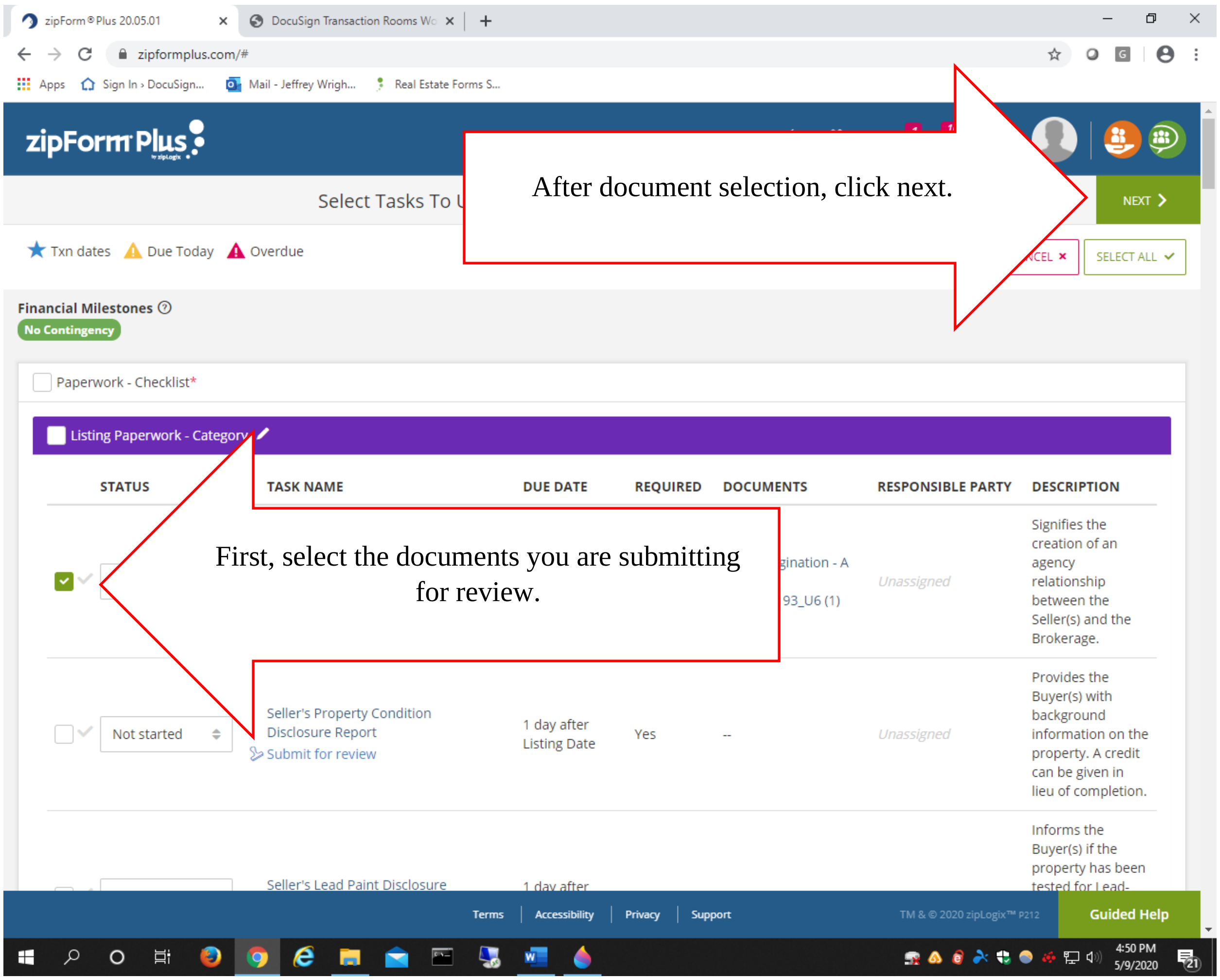
13. You will be given the option to choose as many documents to send for review at one time as you wish to do so. After you choose the documents you are sending for review, click the "Next" button in the upper right-hand corner of the page.



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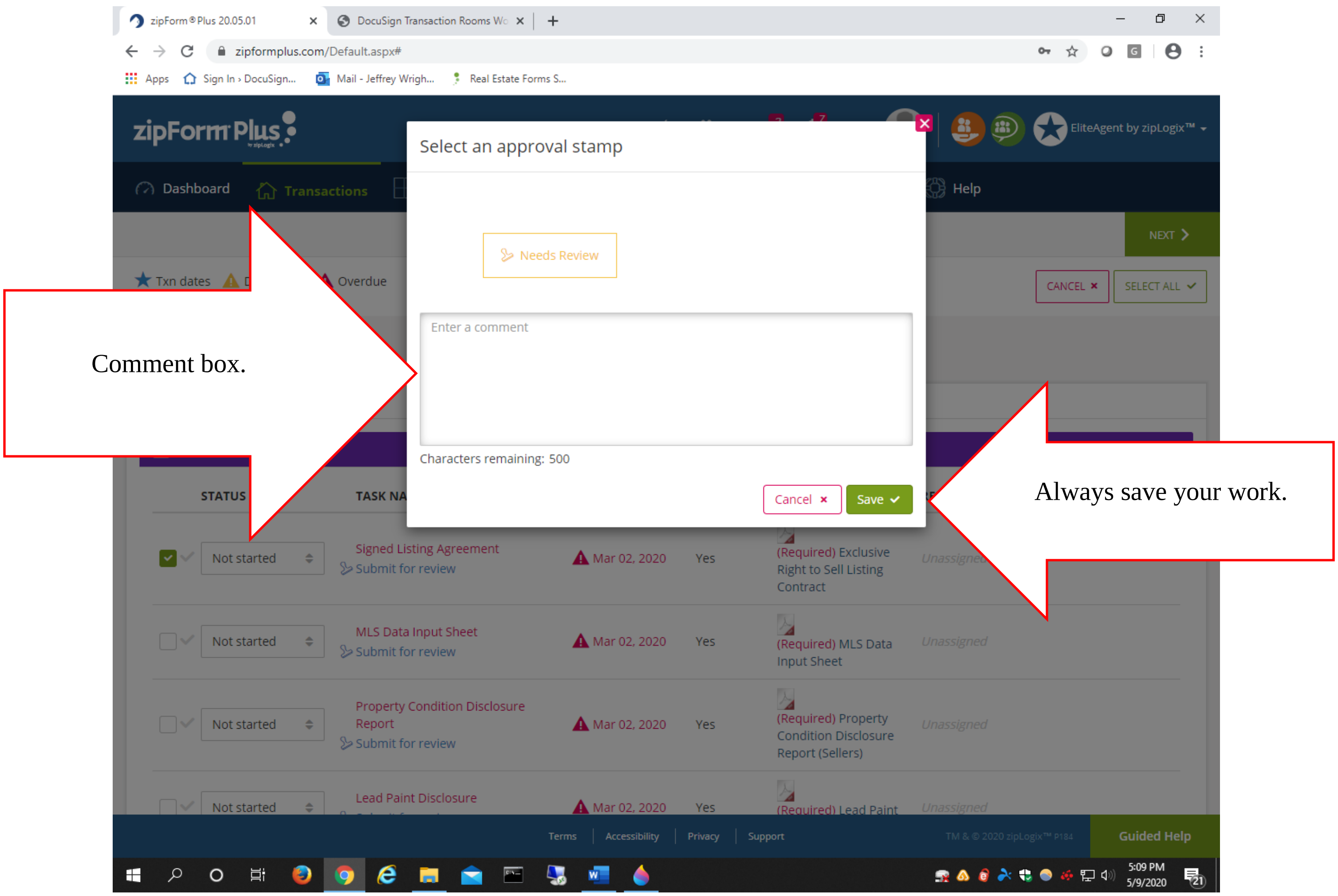
14. "Select an approval stamp." The default option of "Needs Review" has been pre-selected for you. If you need to write a message to the administrator reviewing your documents, you can do this here as well.

**Even if you are submitting multiple documents at the same time, you only have one comment box. So, if you are noting something, be extra specific with which document(s) you are communicating to us about.*



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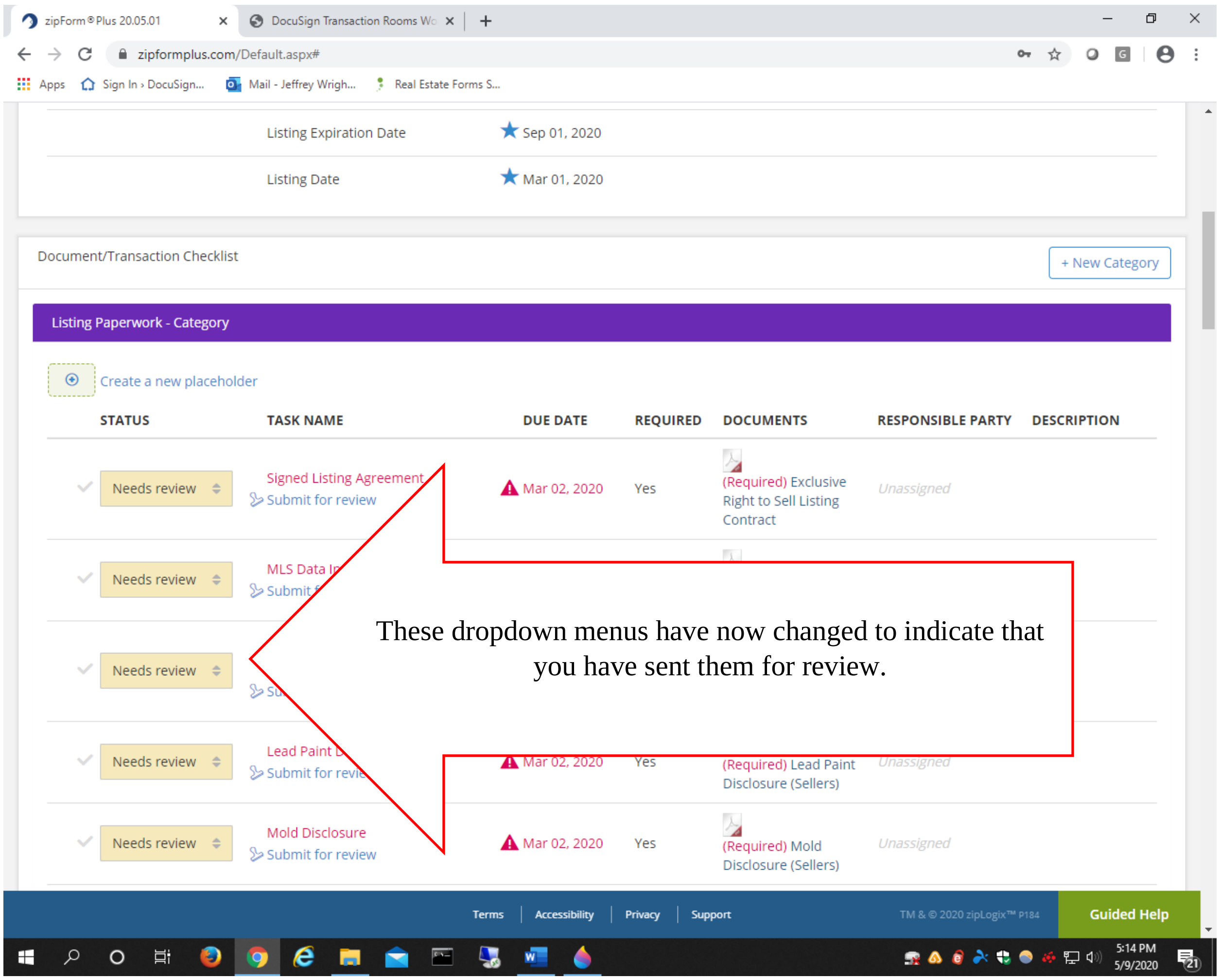
After saving, your checklist will now show that your items “Need Review.”



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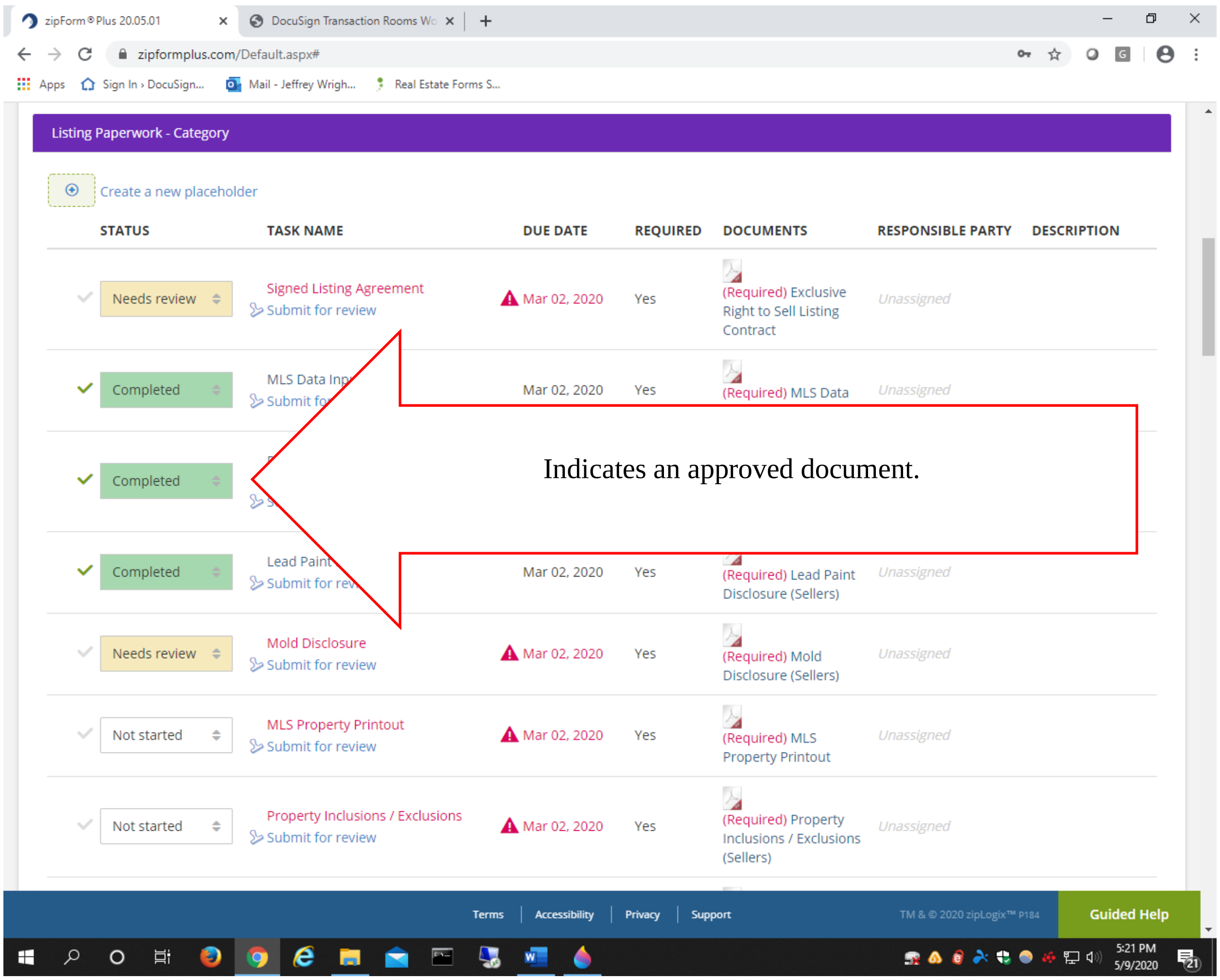
So, how do you know if a document has been approved or denied? If the dropdown menu has turned green and says "Completed," your document is approved.



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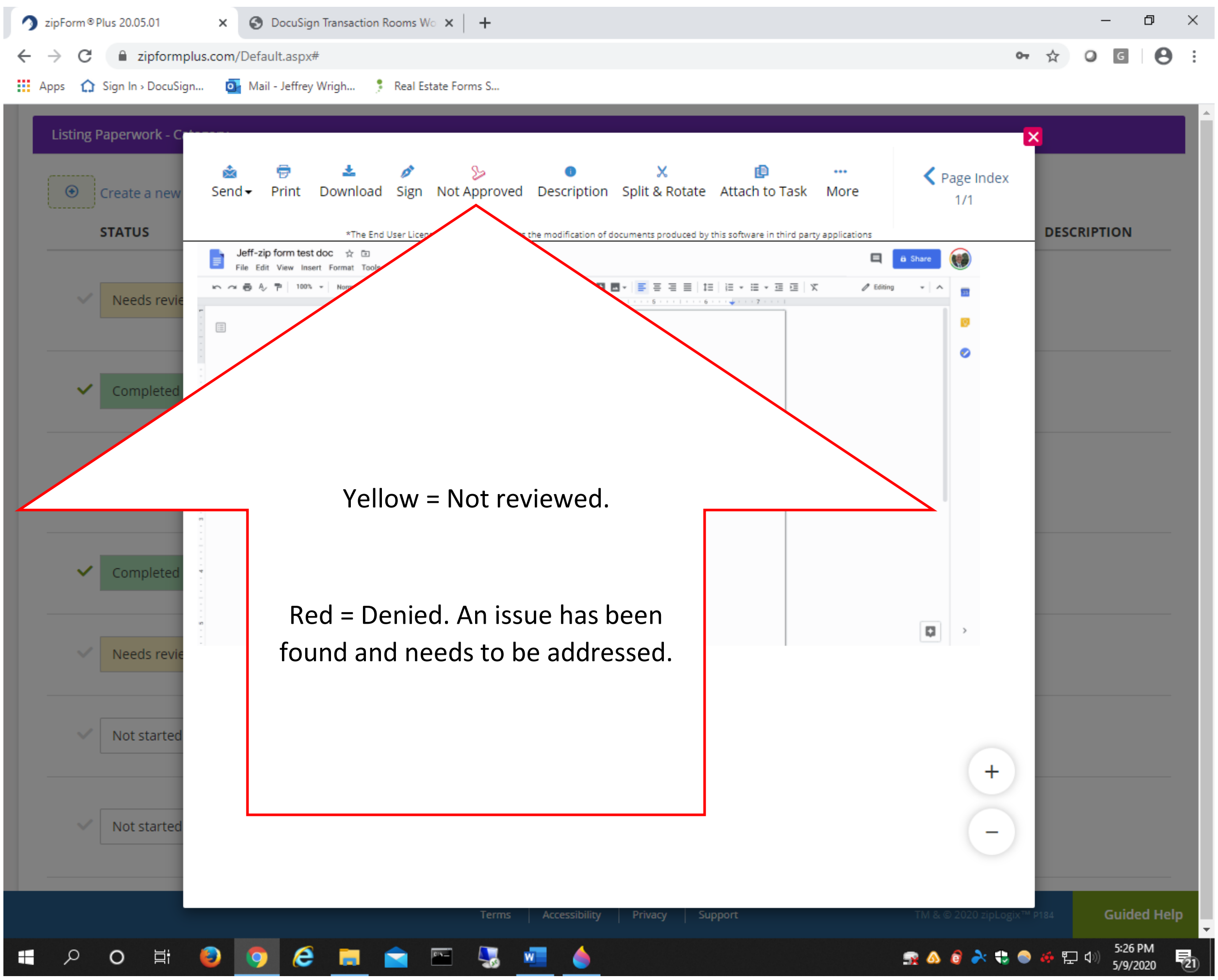
If your documents still say "Needs Review" they have not been approved. This means one of two things. One, an administrator has not reviewed your document yet. Or, two, something is wrong with your document.

Click on the document and look for the approval stamp on the icon bar above the document. If the stamp is still yellow, it has not been reviewed. If the stamp is red, it has been denied, and there will be a comment to tell you why.



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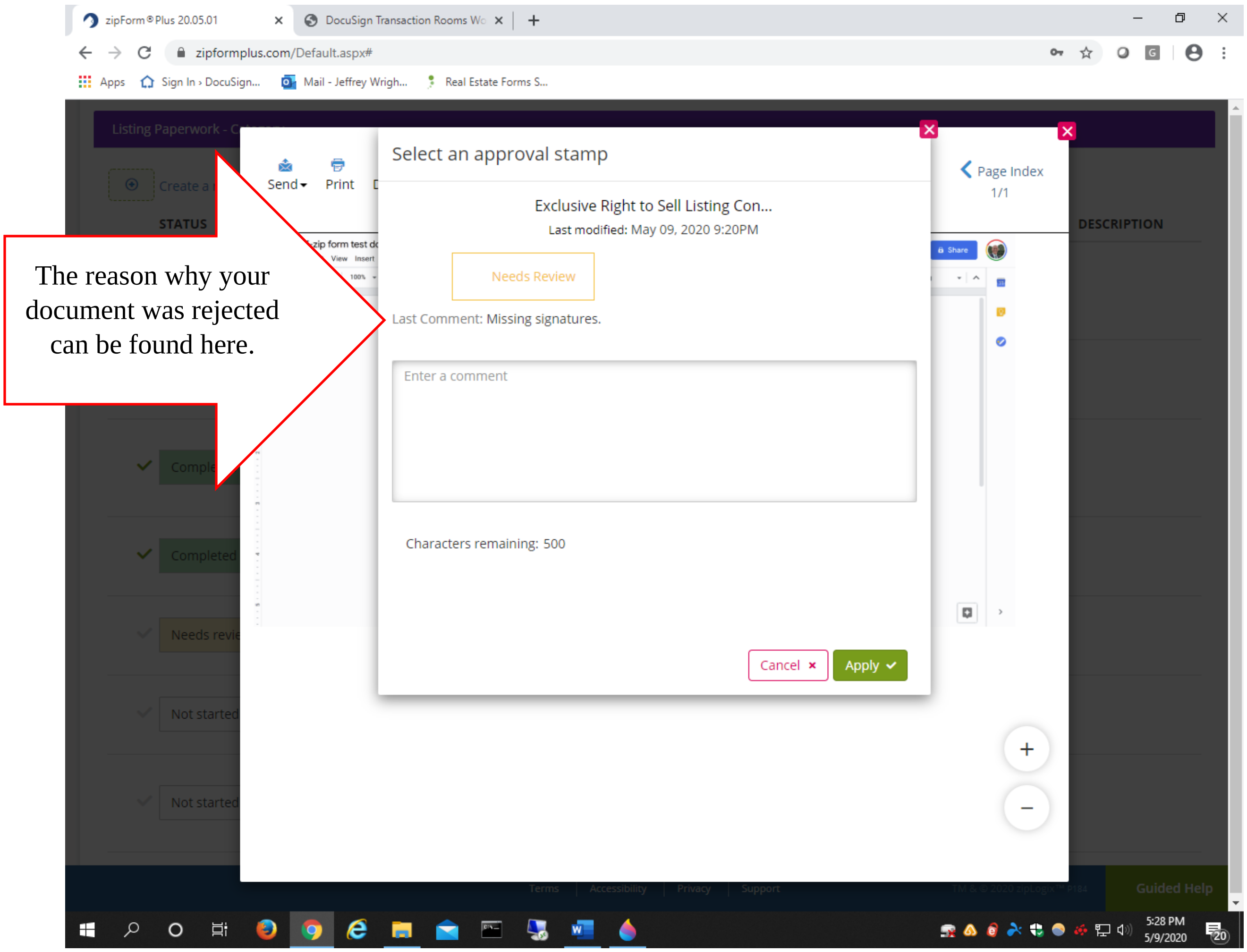
If you have red stamp denial, click on the stamp icon to see the reason why.



Please address any issues and re-submit as soon as possible.

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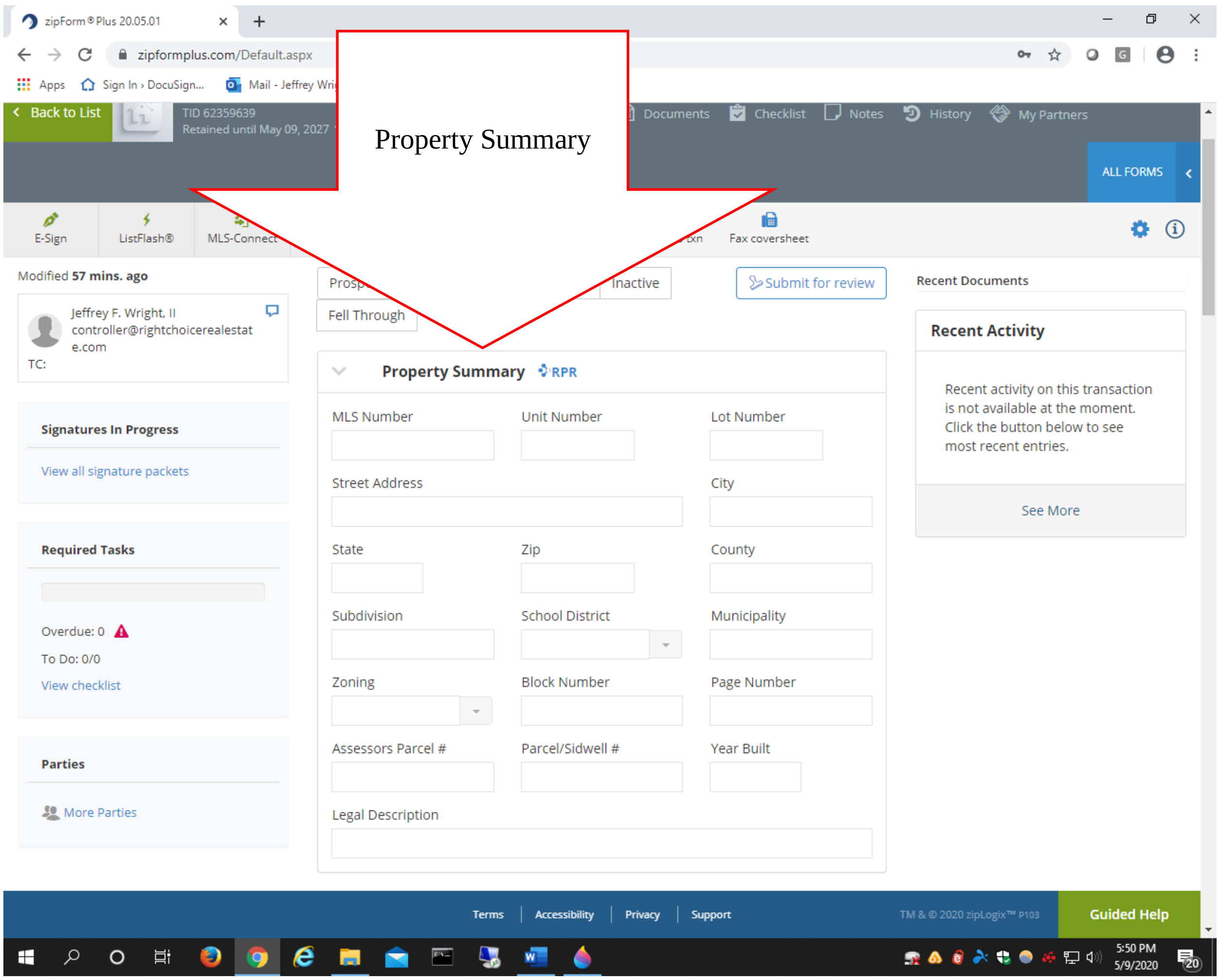
15. With your listing paperwork uploaded, please return to the Transaction Summary page and be sure that the Property Summary and Listing Summary sections are filled out. **Note: If you are using fillable forms from Zip Logix, this information should automatically transfer here. If you are using pdf forms, you will need to fill this out yourself.*



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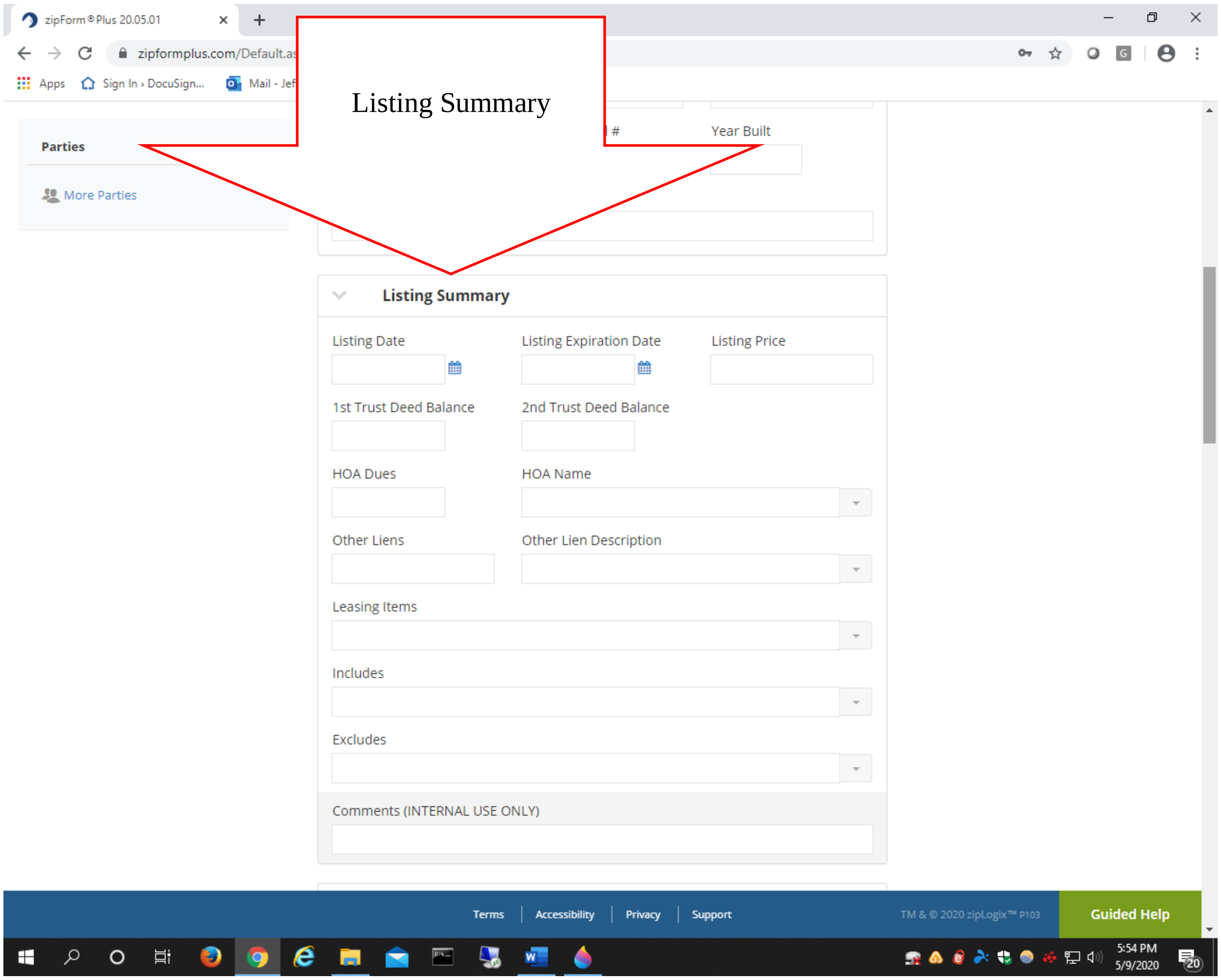

Once you have uploaded and received approvals for all listing paperwork and filled in the Property Summary and Listing Summary on the Transaction Summary Home Page, it is time to move on to the transaction paperwork portion of the transaction.

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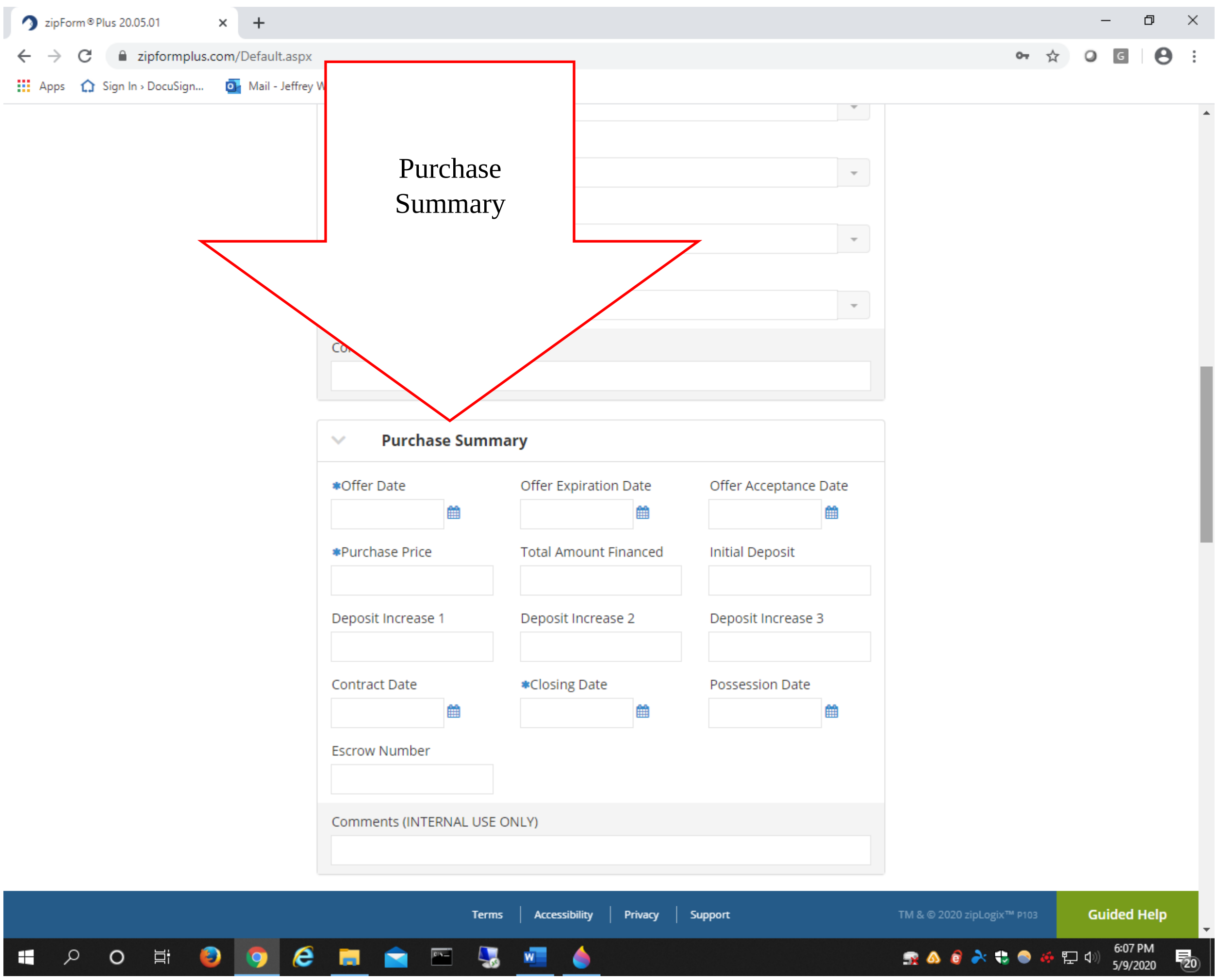
A deal has been put together, congratulations. This next section of the transaction must be done in a timely fashion. It is our expectation that within 24 hours of an offer being accepted that the following steps will take place to ensure that our accounting and transaction records accurately reflect the business we are doing as a firm.

16. The remaining sections of the Transaction Summary Page, except the "Closing – brokerWOLF" section, must be filled out.



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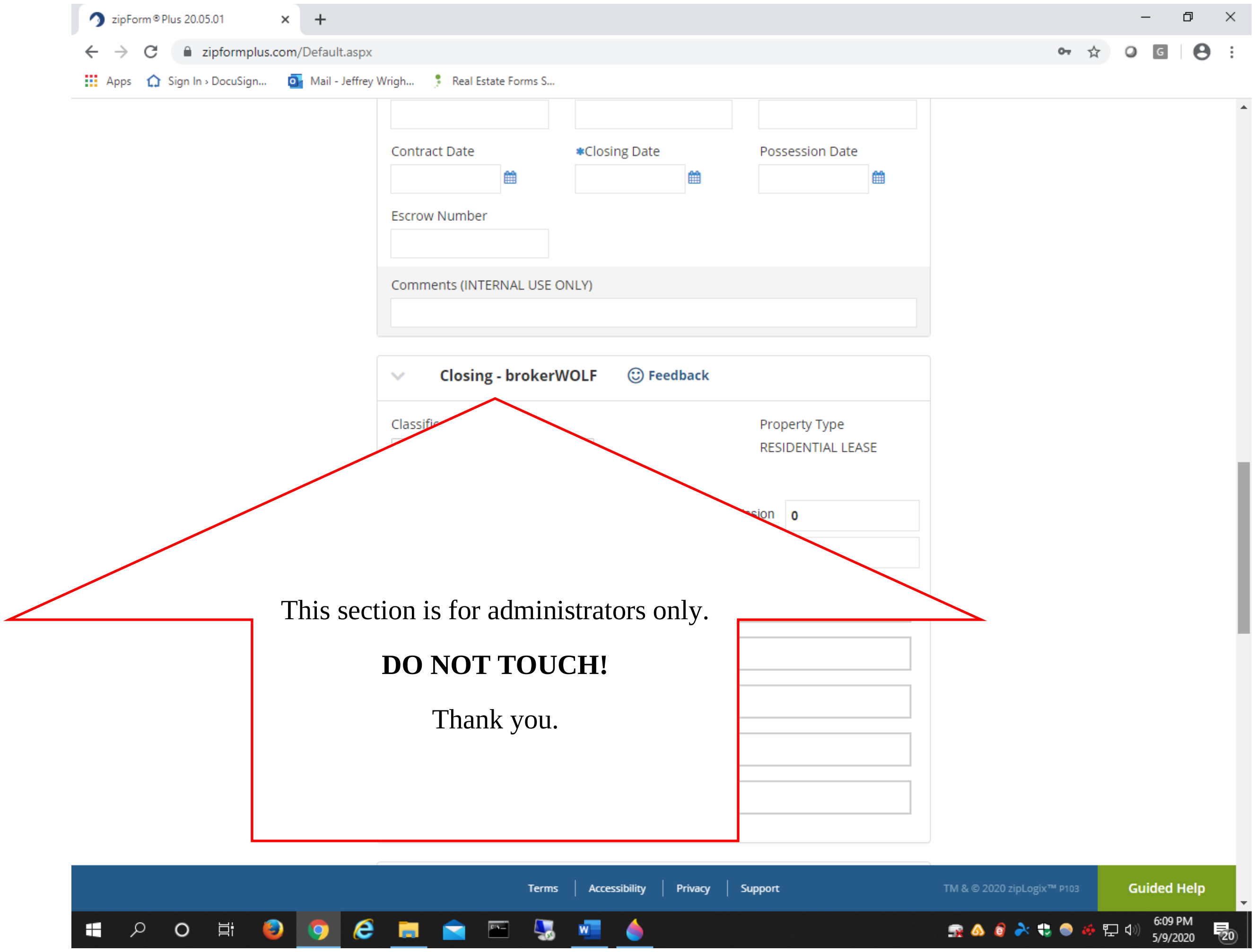

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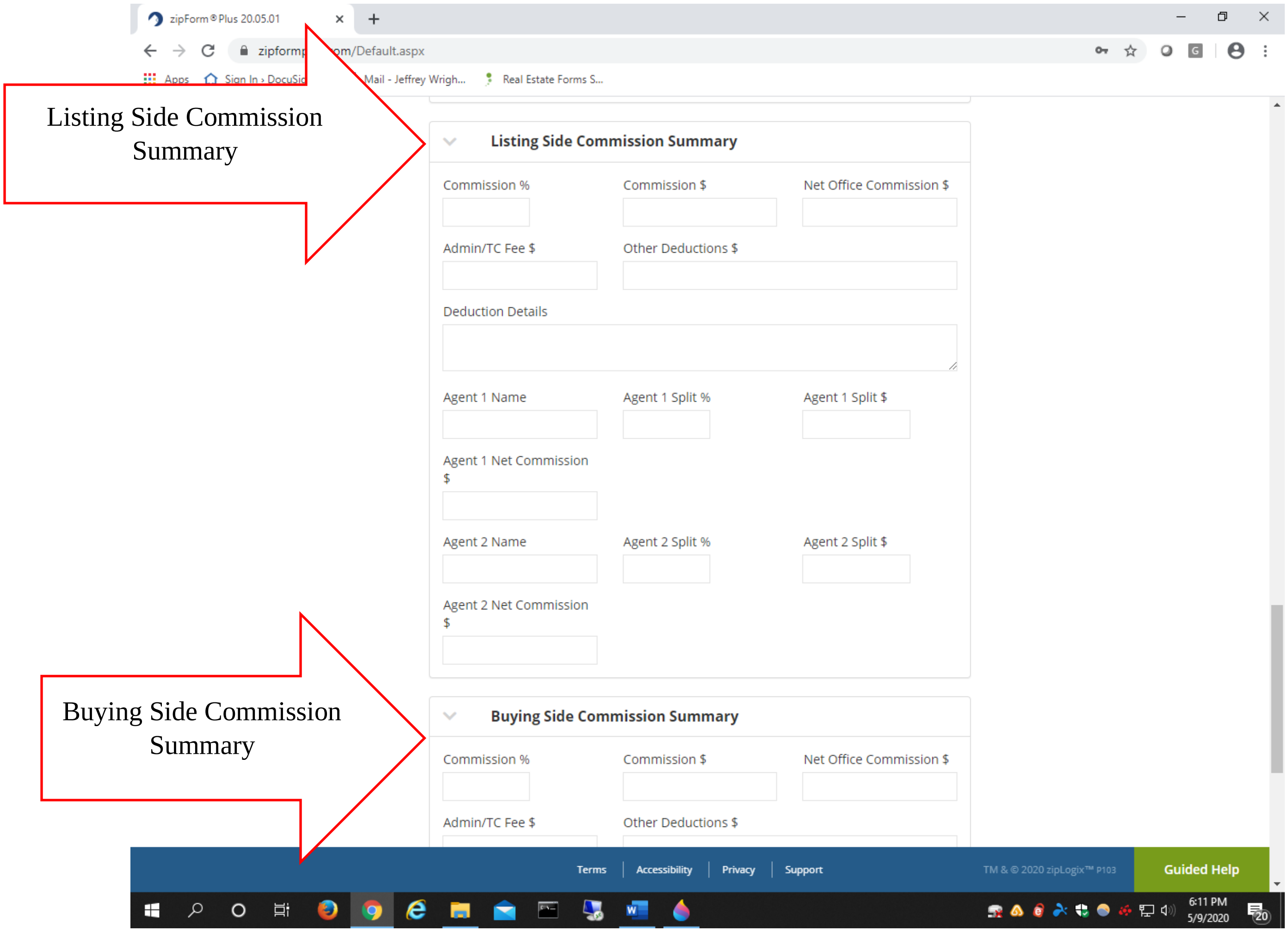

For the Listing Side Commission Summary, as the listing agent you will know exactly what to put here. If you have an in-house referral to pay, put them in the Agent 2 boxes. If you have a referral to pay out, put it in the deduction details. Do not fill out the "Net Commission" boxes.

For the Buying Side Commission Summary, please just fill out the "Commission %" box. If a different RE/MAX Right Choice agent brought the buyer, you can fill out their name in the "Agent 1" box.

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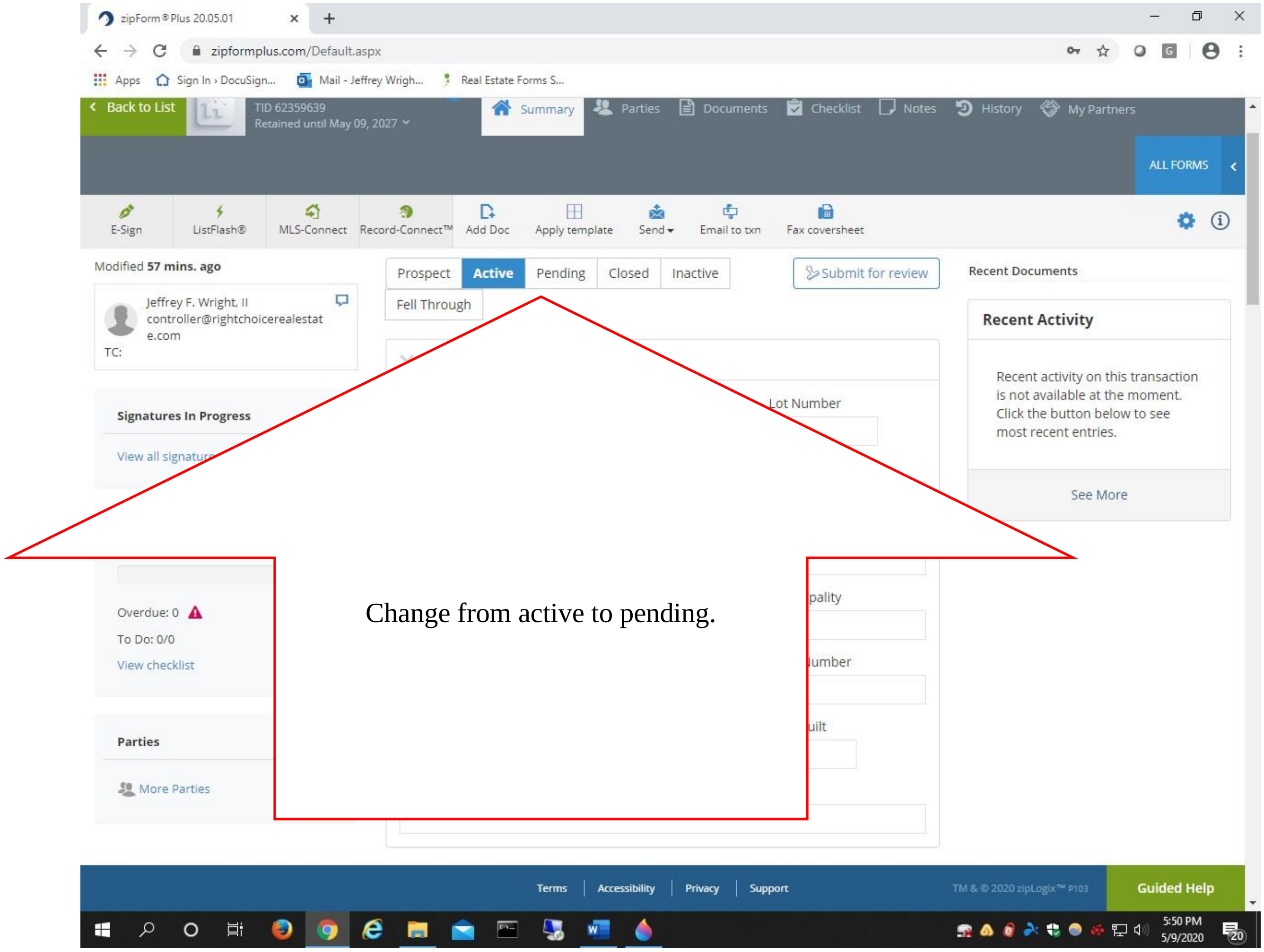
17. After filling out the remainder of the Transaction Summary page, please return to the top of the page and change the property from "Active" to "Pending." *This will indicate to the administrator working with your file to fill out the "Closing – brokerWOLF" section of the transaction summary page.*



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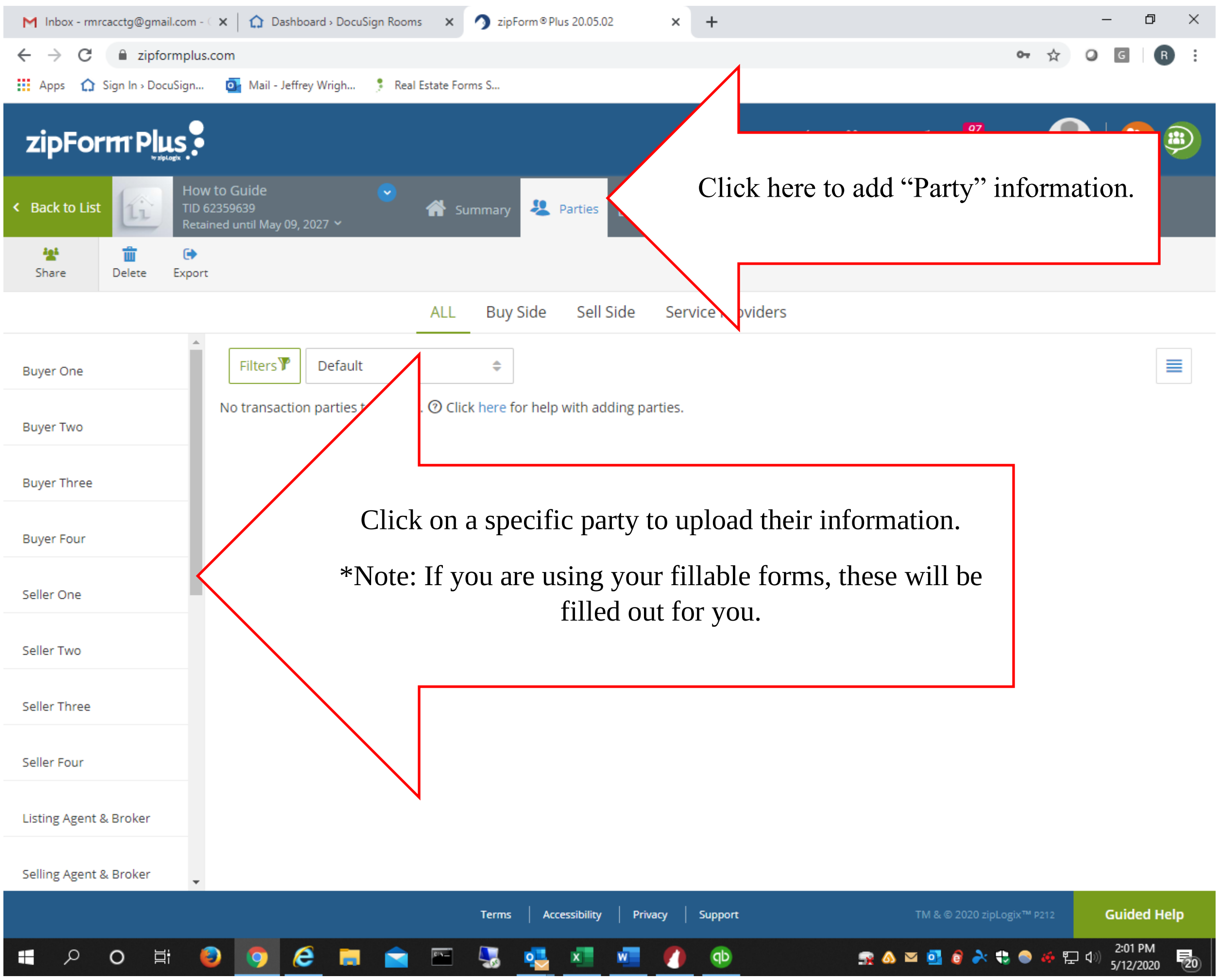
18. Now is the time to make sure the following “Parties” are accounted for:
    a. Buyer(s), Seller(s), Other Agent
    b. Everyone else can be entered later

There are two ways to upload these parties to the transaction. One, you have already entered this information in any fillable form (Cover Sheet Bonus on the next page). Two, click on the “Parties” icon and upload the data from there.



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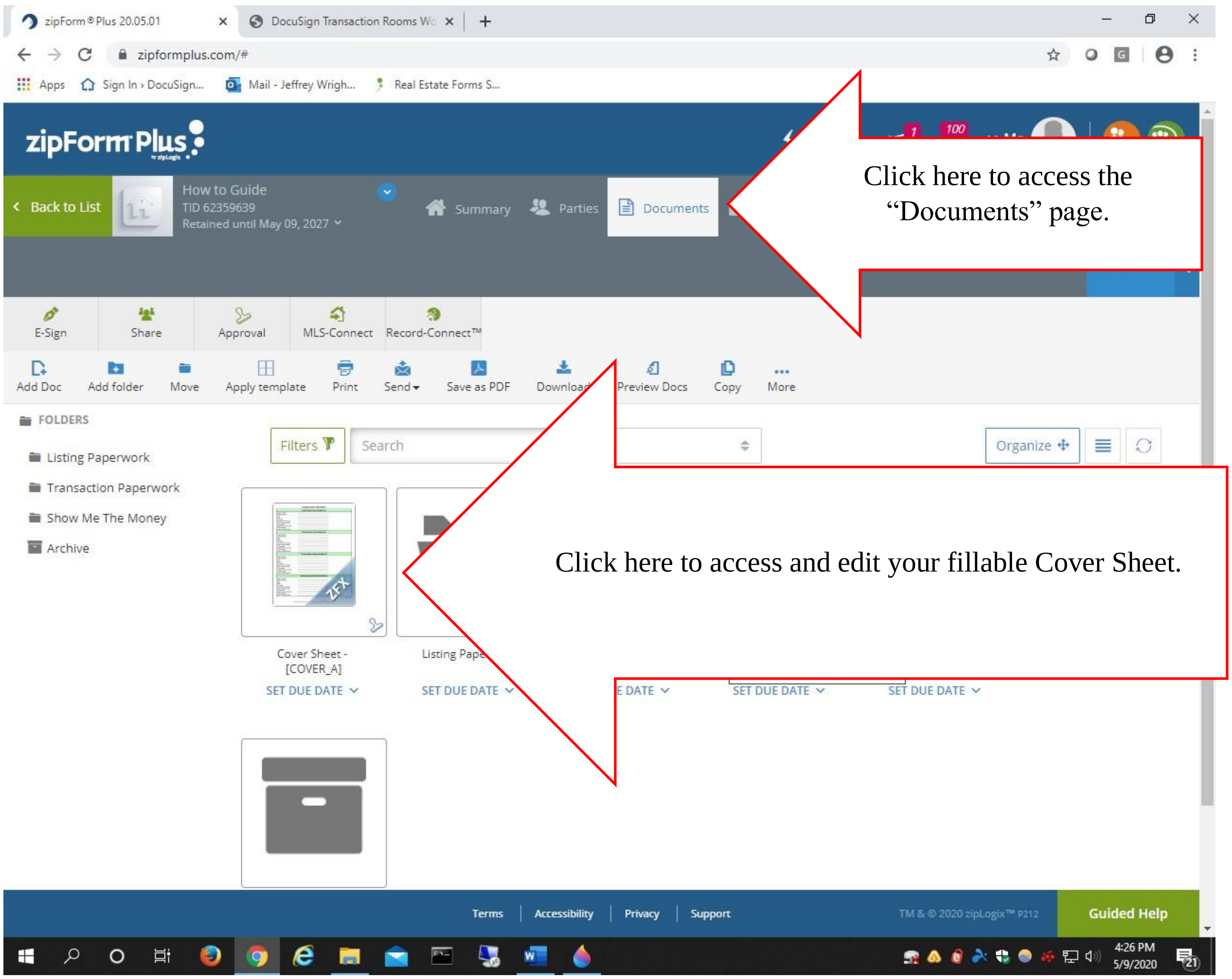
**Aside 2: A Pro Tip Bonus!*

Use the Cover Sheet. In the "Documents" section of every transaction there is a Cover Sheet. It is a fillable form that is linked with everything in your transaction. If you are already using fillable forms, this will fill as you go. However, if you are only using pdfs or other non-fillable documents this form will help you to minimize your data entry.



Data seamlessly flows between the fillable forms, the transaction summary page, the parties page, and brokerWolf.

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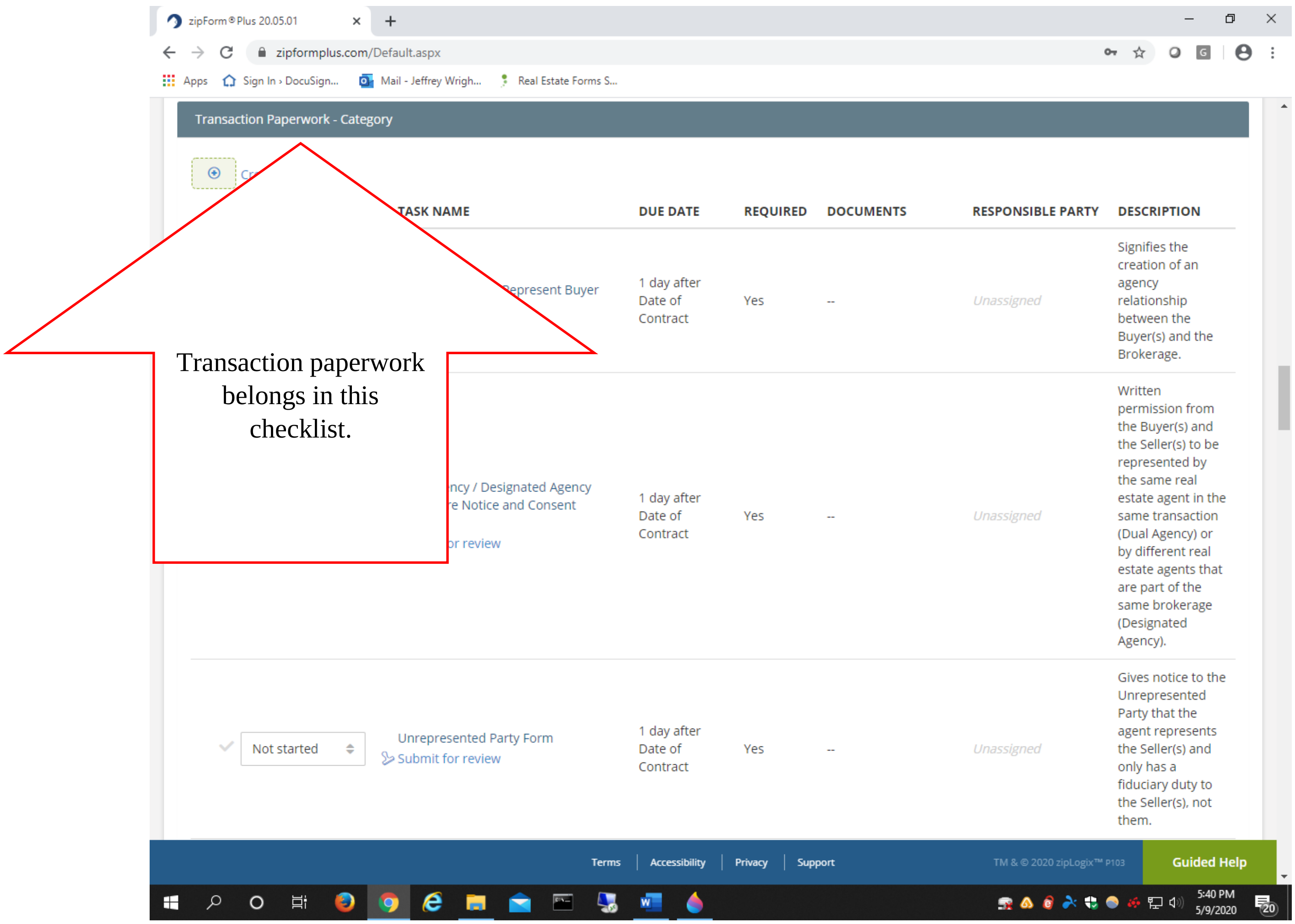
19. Transaction paperwork. After previously uploading your Listing Paperwork, we know you are experts at doing this. The process for Transaction Paperwork is identical, you just need to use the section of the checklist that is under the heading "Transaction Paperwork." **This checklist is located directly under the Listing Paperwork checklist. Scroll down and you are sure to see it.*



Upload documents, submit for approvals, make corrections (if necessary), receive approvals.

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The deal has closed, and now it is time to get paid!

20. You need to go back through your Listing Paperwork and Transaction Paperwork checklists to confirm that all required documents have been approved. If they still have not been approved, address the outstanding issue so we can pay you.
21. Upload your "Show Me the Money" paperwork. If these things are uploaded before the accounting department receives your commission check then processing can happen in a timely manner. As a reminder, we should not have to chase you down to pay you.
    a. Commission Check – Will be uploaded by accounting if sent in the mail. If you, the agent, are picking up your check, please upload a copy before dropping it off for processing.
    b. CDR – Fill this out ahead of time. If it matches the check we receive, we can process said check asap. If it does not match your commission check, we can figure out the discrepancy and correct it right away.
    c. Referral Agreement Paperwork – You got this referral before you got the client, this should be uploaded at the beginning of your journey.
    d. Referral Brokerage W-9 – If we ever pay any other Broker, for any reason, we a W-9 form filled out and signed by that brokerage. Ask for it when you sign the referral agreement.
22. After you have been paid, an administrator will archive the file after they have changed it from "Pending" to "Closed."