

Secure Sharing, Chat, and Screen Share

Work with clients and fellow agents on transactions entirely online with zipCommunity[™]. Collaborate live with video, audio, or text chat. Screen sharing is also available to meet online. Screen sharing is available on Chrome and requires the zipCommunity[™] Screen Share Extension to be installed.

How to Collaborate:

1. To share, Chat, or Screen Share Transaction forms, click on the Share Docs Quick Tool.

⑦ Dashboard Transactions Templates	Tasks 📑 Contacts 🚑 .	Admin 🔇 Partners 🚯 H	lelp				
 < Back □ 123 Main Street ○ 110 36400413 Retained until Jan 02, 2027 > ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○	2	🗳 🖵 ୭	Ø				ALL FORMS 🔾
	► Active	SUBMIT FO	DR REVIEW				
Ed Charboneau edwardc@car.org	Property Summary			× Cancel × Save		Ē.	
Listing Residential	MLS Number	4MLS	Municipality Type		Apply Template	Email Docs to Txn	Fax Docs to Txn
TID 36400413	Street Address		Zoning	· ·			
Modified 1 hour ago	Unit Number		Lot Number			101	121
	City		Block Number		Add Docume it	Share Docs	Sign
	County		Plat Book Number				

2. Click on Add a person to add a Collaborators that will have access to the Transaction File.



3. Select from the next screen, who your Collaborators will be.





4. Set how your Collaborators interact with your files.

Nate Osollo	Can edit forms	No
nateo@car.org	Can upload documents	No
	Can view history	No
	Stop sharing date	02/03/2018

5. Choose which documents or files these users will have access to and click **Send & Save**.



6. Your Collaborator(s) will receive an email inviting them to the zipCommunity[™] platform. They will click the button to **View Documents**.

ñ	Dear Nate Osollo, Ed Charboneau Is sharing documents for 123 Main Street with you. Click on the "View Documents" button below sign in and view the shared documents.
	View Documents

7. New users will need to create credentials to log in to zipCommunity[™]. Returning users can enter credentials they have set up in the past.

Create a FREE account	Sign in to continue
2+	101
 Review and sign documents Video chat Download documents 	_
Create Account	Sign In



TIP: Current zipForm[®] Plus users can use the **Share Key** (included in the email invite) to collaborate from their own zipForm[®] Plus account. They should log in to zipForm[®] Plus like normal, adjust **My Transactions** to **Transactions shared with me**. Enter the code from the email invite into the **Shared Key** field to continue.

Enter Shared Key	Join transaction 🔺
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8. After logging in, Collaborators can now edit, upload, and review information as permitted by the REALTOR[®]. The Collaborators can also chat, video chat, and screen share at this point.

	JipCommunity		×
	=	To: Nathaniel Osollo, Add participant. + Audi	io + Video
	3:21 PM Nathaniel Osollo Thank You for joining this trans	Nathaniel Osolie Hello! 3:21 PM	2
		Ed Charboneau Thank You for joining this transaction! I am excited to start 3:21 PM 🗸 working with you!]
TIP: zipCommunity [™] allows users to chat, share video, and/or Audio. Once a Collaborate session has been initiated any user can chat with one another as long as the other user is logged into zipForm [®] .			
		Message Nathaniel Osollo	Send

9. When a Collaborator is done working they can click **Close** and zipForm[®] Plus will prompt them to notify the agent that changes have been made. Collaborators can also notify the agent without closing the Transaction file with the **Contact Agent** button.

TIP: The **Contact Agent** button will send **Notifications** to the REALTOR[®]: one via email and one inside the zipForm[®] Plus platform. Chat messages are only seen when a user is already logged in to zipForm[®] Plus.



Instant Messaging, Video Chat, and Screen Share

Work with clients and fellow agents on transactions entirely online with zipLogix[™] Community. Collaborate live with video, audio, or text chat. Screen sharing is available on Chrome and requires the zipLogix™ Community Screen Share Extension to be installed.

Click on Chat 1

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4.

5.



3-33 PM When the Chat window opens click on Start a new chat New chat 🔜 zipCo Enter a participant Ξ To: • Nathaniel Osollo, Add participant. 3. 1 6. + Audio Nathaniel Osollo Toggle between Hellol conversations Ed Charboneau Thank You for joining this transaction! I am excited to start 3:21 PM \checkmark working with you! Type and send messages 6. Audio and Video style chats can be launched at any time Message Nathaniel Osollo Send 5. 7. Video chat options allow users to view zipCommunity video feeds full-screen, 1 I Share screen End 7. revert to Chat, mute 3:34 PI their microphone, Waiting for people to join... Screenshare, and 3:33 PM End the calls. **TIP:** Screen sharing requires the To: • Nathaniel Osollo, Add participant zipCommunity[™] Screen Nathaniel Osollo Hello! 3:21 PM Share Extension. Click on Ed Charboneau Thank You for joining this transaction! I am excited to start 3.21 PM \checkmark working with you! Add extension when prompted. Ed Charboneau Add "zipLogix™ Community Screen Started video call Share"? ★★★★★ (0) View details

 Read and change your data on all zipformore sites, all zipformplus.com sites, and localhos · Communicate with cooperating websites · Capture content of your screen

Add extension

Cancel

It can