

## **Welcome to the Greater Philadelphia Association of REALTORS®!**

As a valued member, you now have access to the NAR Transaction Management Benefit. To add further value to your membership, you also have zipForm® Mobile included as a member benefit. Utilizing this benefit will enable you to stay connected and move transactions forward anytime and anywhere business calls.

- zipForm® Plus – Industry-leading electronic forms engine
- zipTMS® – Integrated transaction management
- zipVault® – Safe, integrated cloud storage
- zipForm® Mobile – The optimal mobile transaction platform

For more information about your NAR Transaction Management Benefit, please visit <https://ziplogix.com/nar-member-benefit/>.

For more information about zipForm® Mobile, please visit <https://ziplogix.com/zfmobile/>. You can also download the free Apple or Google app to go along with the product in their respective app store.

### **How to Activate zipForm® Plus:**

- Visit <http://www.zipform.com/order/order.asp> to setup your account
- Choose Pennsylvania/Greater Philadelphia Association of REALTORS® from the drop-down menu
- You will then enter your NRDS number and last name
- Continue setting up your credentials including username and password
- Once these are created, you will see a page with all the included products as well as additional products you can purchase

### **Logging Into zipForm® Plus:**

- Simply enter your credentials at the login screen at <https://www.zipformplus.com/>

### **Support and Training:**

- Live Online Training Webinars <https://ziplogix.com/live-online-training/>
- Pre-Recorded Training Webinars <http://bit.ly/ziplogixGoToStage>
- YouTube Channel <https://www.youtube.com/ziplogix>
- Knowledge Base with Support Materials <https://ziplogix.com/support/>

## **How to Renew:**

- Please note that your renewal will occur annually on or around April 1st. You will begin to receive notices 30 days prior to the renewal.
- Single users simply need to follow the renewal process form the message they receive when they log into their account.
- If you are renewing a brokerage account, you will need to call the Sales department to renew your accounts at 866-627-4729.

Please note: if you have purchased any additional products not being provided by the Greater Philadelphia Association of REALTORS®, you may be asked to go through the shopping cart renewal process, however, you will not be charged for the products that are being provided by the Greater Philadelphia Association of REALTORS®; only those additional products that you have purchased on your own. If you are having problems with your renewal, please call Customer Care at 586-840-0140.

## **Creating a Connection Between zipForm® Plus and DocuSign:**

1. Log into zipForm® Plus
2. Go to the top right corner of the screen and click the arrow by your name
3. Select “profile” from the drop-down list
4. On the left-hand side of the screen select “settings”
5. The top box on this page should be e-Signature Options
6. Make sure the DocuSign button is selected
7. Enter your DocuSign email address and DocuSign password
8. Click “save” located above and slightly to the left of the e-Signature options box
9. You should see a message “user preferences updated” signifying that the connection is complete.

Please note that if you see a message stating that you have invalid user credentials, the connection has not been made. There is likely an error in the DocuSign email/password. Re-enter and save again