

Welcome to  
**ZipForm<sup>®</sup> 5.0 User's Manual**

Use ZipForm<sup>®</sup> 5.0 Help to learn more about using ZipForm<sup>®</sup> 5.0.  
Connect to the Web to get software updates.

ZipForm<sup>®</sup> is a registered trademark of RE FormsNet, LLC<sup>™</sup>.

See [Disclaimer](#) for more information.

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## OVERVIEW

### OVERVIEW OF ZIPFORM®

ZipForm® is the software that introduced forms automation and laser printing to the real estate community. ZipForm® allows you to bring a complete real estate transaction software system and the benefits of Windows to the entire office.

The Windows® version of ZipForm® officially debuted at the 1995 REALTORS® Show in Atlanta, ZipForm® for Windows® was selected by the National Association of REALTORS® for inclusion in the Computer Software category of the New Product Technology Showcase.

ZipForm® employs the standard Microsoft Windows® GUI (Graphical User Interface) techniques. Once a form is displayed, the use of the product is very similar to other popular Windows® programs. While this guide assumes the reader has some Windows® knowledge, the [Glossary of Terms](#) is devoted to defining some of the terminology that will be used throughout this guide for novice Users. Additional understanding of computer terminology is available by searching for "computer dictionary" on the Internet.

Some of the benefits provided by ZipForm®:

- Increase productivity with standardized forms process
- Offer the leading-edge in technology to your sales staff
- Present a professional image to your customers
- Streamline administrative tasks
- Instant information recall
- Portable printing

Specific Program Features:

- Unlimited forms usage
- Print to any printer supported by Windows® 95, 98, 2000, or NT 4.0
- Creation, insertion and storage of custom clauses
- Calculation and amortization capabilities
- Text Strike Out features - WARNING: Strike Outs are prohibited in some areas and may be disabled. RE FormsNet, LLC™ is not responsible for the illegal use of this or any other feature of this product.
- Specific transaction information is entered once and carried forward throughout all forms needed to complete a transaction.
- Intellicopy provides an instant point-and-click link that copies repetitive information between fields.
- Pull-Down calendar allows point-and-click date insertion and date advances for contingencies.
- Independent, secure user files allow access to all form files.
- Secures agents' specific customer transaction files.
- Expanded calculation and amortization features automatically carries financial information throughout the entire form.
- Field level help explains transaction information needed to complete current field.
- Spell check correction feature enhances accuracy.
- Jumps provide easy movement between forms.
- Section menus give you direct access to any section of a page.
- Tab stops permit easy movement through a form.
- On-line Help Screens provide instant assistance.

### WHAT'S NEW IN 5.0

The following features have been added to ZipForm® Version 5.0

- Ability to send a Transaction by Email
- Microsoft Outlook® Integration
- Real Estate Transaction Standard (RETS) XML Import/Export\*
- "Sticky" Notes
- Multiple Transactions active at the same time
- Multiple Save Locations

- Auto Cover Sheet
- Zoom and Page Size Display
- Amortization Scheduling
- Faster 32 Bit Processing
- Data Encryption

\* At the publication of this manual the completion of the RETS is pending. However, ZipForm<sup>®</sup> has implemented the necessary fundamentals to utilize RETS upon its completion.

## INSTALLATION

### PROGRAM REQUIREMENTS

Warning: Editing \*.ini files in ZipForm<sup>®</sup> without authorization or specific instructions is considered tampering and WILL render ZipForm<sup>®</sup> program inoperable.

ZipForm<sup>®</sup> for Windows<sup>®</sup> will function effectively with a minimum computer configuration as follows:

- IBM PC compatible 486 processor, or higher.
- MS Windows<sup>®</sup> 95, NT 4.0, or newer.
- 8 megabytes (MB) of Random Access Memory (RAM).
- 6MB available hard disk space.
- CD-ROM drive
- Color or monochrome VGA monitor or higher resolution (256-color SVGA recommended).
- Any printers that can be configured with Windows<sup>®</sup> Print Manager.
- Optional: Internet and Email use requires a 14.4K, or higher, modem with Internet Access and MAPI compliant Email software.

The speed and performance of the product is greatly enhanced with more advanced processors, modem speeds, and larger RAM configurations.

### INSTALLING ZIPFORM<sup>®</sup>

WARNING: Editing \*.ini files in ZipForm<sup>®</sup> without authorization or specific instructions is considered tampering and WILL render ZipForm<sup>®</sup> program inoperable.

1. Place the ZipForm<sup>®</sup> Program CD in the CD-ROM Drive of the computer. ZipForm<sup>®</sup> will automatically start the installation process. If the ZipForm<sup>®</sup> Setup dialog box appears, go to Step 4. If the dialog box does not appear after approximately 30 seconds, go to Step 2.
2. Select the Windows Start button. Then select Run.
3. Locate which CD-ROM Drive the ZipForm<sup>®</sup> Program CD by selecting Browse, then open My Computer. The ZipForm<sup>®</sup> Program CD will be listed with a capital letter in brackets. Example: ZipForm 5.0 CD [D:]. In this example, the ZipForm<sup>®</sup> Program CD is located in the D: Drive. Once the CD-ROM Drive has been located, select Cancel.
4. With the Run dialog box displayed, type the CD-ROM Drive (D) and the word SETUP in the Open Box. Example: D:SETUP. Select the OK button. This will invoke the setup program.
5. When the ZipForm<sup>®</sup> Setup dialog box appears allowing the User to accept or change the default drive and directory. ZipForm<sup>®</sup> recommends novice Users accept the default specification. Select the OK button to proceed.
6. After the files have been transferred, the User Information dialog box will appear prompting the User to enter specific information. To change this information once it has been saved will require [Product Support](#) from RE FormsNet, LLC<sup>™</sup>. Select the OK button to proceed.
7. After the Program files have been copied to the hard drive the Program will begin and prompt for a login name and password. THE DEFAULT USER NAME IS "MASTER" AND THE DEFAULT PASSWORD IS "PASSWORD".
8. The User Manager will appear to configure User access. For additional information on User and Library access see the [User Manager Section](#).

This concludes the Setup process. ZipForm<sup>®</sup> Version 5.0 is now installed and ready for use. Experienced Windows<sup>®</sup> or ZipForm<sup>®</sup> Users may skip to the [Quick Start](#) section.

To give the standard installation of ZipForm® Version 5.0 the ability to add multiple users please call:

**REFormsNet Sales at:**

Phone Number - (800) 383-9805

**NETWORK INSTALLATION**

NETWORK CONFIGURATION

ZipForm® 5.0 may be installed on a network drive to allow simultaneous access to many Users. The number of Users is restricted by the ZipForm® 5.0 Licensing Agreement. The installation process is similar to a Single User installation. However, a Single User Version may not be installed on a network. The computer used for installation becomes the Master Workstation. Much like the Master User, the Master Workstation must be the same computer used for updates and other program alterations.

1. Place the ZipForm® Program CD in the CD-ROM of the Master Workstation. ZipForm® will automatically start the installation process. If the ZipForm® Setup dialog box appears, go to Step 4. If the dialog box does not appear after approximately 30 seconds, go to Step 2.
2. Select the Windows Start button. Then select Run.
3. Locate which drive the ZipForm® Program CD by selecting Browse, then open My Computer. The ZipForm® Program CD will be listed with a capital letter in brackets. Example: ZipForm 5.0 CD [D:]. In this example, the ZipForm® Program CD is located in the D: drive. Once the drive has been located, select Cancel.
4. With the Run dialog box displayed, type the drive and the word (command) SETUP in the Open Box. Example: D:SETUP. Select the OK button. This will invoke the setup program.
5. When the ZipForm® Setup dialog box appears allowing the User to accept or change the default drive and directory. ZipForm® recommends novice Users accept the default specification. The drive chosen must be accessible to all intended Users. Select the OK button to proceed.
6. After the files have been transferred, the User Information dialog box will appear prompting the User to enter specific information. To change this information once it has been saved will require [Product Support](#) from RE FormsNet, LLC™. Select the OK button to proceed.
7. After the Program files have been copied to the hard drive the Program will begin and prompt for a login name and password. THE DEFAULT USER NAME IS "MASTER" AND THE DEFAULT PASSWORD IS "PASSWORD".
8. The User Manager will appear to configure User access. For additional information on User and Library access see the User Manager Section.
9. A Windows® program icon (shortcut) will have to be added all network computers to allow access to ZipForm®. This is accomplished by "double-clicking" the ClientInstall.exe file located within the ZipForm® directories. Select the Start menu, the Find submenu, and Files or Folders.
10. In the Named field type CLIENTINSTALL.EXE. The network drive, or Master Workstation's hard drive will need to be in the Look In field. If the drive of the network server does not appear on the pull-down menu, select the Browse button, select the plus sign (+) next to Network Neighborhood and select the network server.
11. Select the Find Now button. The ClientInstall.exe file should appear under the Name column with the location under the In Folder column. If the file does not appear, verify the information in the Look In field is the network server and try again.
12. When the ClientInstall.exe file appears in Find, "double-click" the icon. This will install all the necessary files a User will need, including a shortcut on the desktop.
13. Test the shortcut by either selecting with the right mouse button and selecting Open from the appearing menu, or "double-clicking" the icon. The ZipForm® Login window should appear.
14. Repeat steps 9-13 from each workstation that will have access to ZipForm®

This concludes the Setup process. ZipForm® Version 5.0 is now installed and ready for use. Experienced Windows® or ZipForm® Users may skip to the [Quick Start](#) section.

ADDITIONAL NETWORK CONSIDERATIONS

Running ZipForm® on a network requires the network drive to be mapped on the local computer. If the local computer is not mapped to the network drive that is running ZipForm® it will not be able to access the forms. See Windows® documentation on how to map a network drive.

Users will need to have "write" capabilities to that network drive.

Editing \*.ini files in ZipForm® without authorization or specific instructions is considered tampering and WILL render ZipForm® program inoperable.

### CHANGING DEFAULT TRANSACTION FILE LOCATIONS

During the installation of ZipForm® 5.0 transaction files are set up to be saved in the folder assigned to the User located on the Hard Drive of the installing computer. The Location Editor allows the Master User to control the location of the Default Transaction File. The [Master User](#) may Add or Remove locations by selecting Options from the Tools menu of the [Menu Bar](#). To Add a location, the [path](#) to the location will need to be entered. If the location path is not known, the Browse button may be used to look for the new location. Using the Browse button will automatically insert the path once the new location is found and the Open button is selected. The path may also be determined by using Find of the Start menu, however, the path will still need to be entered into the Location Editor. To use Find:

1. Select the Start menu, the Find submenu, and Files or Folders.
2. In the Named field type in the location name.
3. Select the Find Now button. The location should appear under the Name column with the path under the In Folder column. If the location does not appear, verify the information in the Look In field is the correct drive.
4. Close the Find window.

### **STARTING**

#### REGISTERING ZIPFORM®

ZipForm® will not operate without proper Registration. Starting ZipForm® 5.0 for the first time will offer Registration by Internet [at www.zipform.com](http://www.zipform.com), or by calling RE FormsNet, LLC™ Customer Service.

#### STARTING ZIPFORM®

NOTE: ZipForm® will not operate without proper Registration. Starting ZipForm® 5.0 for the first time will offer Registration by Internet, or by calling RE FormsNet, LLC™ Customer Service.

To start ZipForm®:

1. Select the Start button to pull-up the Start menu.
2. Move the highlight to Programs to open the submenu.
3. Move the highlight to the ZipForm® program group to open another submenu.
4. Move the highlight to the ZipForm® for Windows® icon and select.

A Windows® program icon (shortcut) may be added to the computer desktop. This will allow quick and easy access to ZipForm®.

1. Select the Start menu, the Find submenu, and Files or Folders.
2. In the Named field type FILL.EXE. The network drive, or network server computer will need to be in the Look In field. If neither the network drive or network server appears on the pull-down menu, select the Browse button, select the plus sign (+) next to Network Neighborhood and select the network server.
3. Select the Find Now button. The Fill file should appear under the Name column with the location under the In Folder column. If the file does not appear, verify the information in the Look In field is the network server.
4. When the Fill file appears in Find, select the icon with the right mouse button. Select Send To from the appearing menu and select Desktop (create shortcut).
5. Close the Find window.
6. Optional: Select the Fill icon on the desktop with the right mouse button. Select Rename from the appearing menu. Type a name for the icon that will be easy for Users to remember and press the Enter key. Example: Transaction Forms. Changing the name of the icon does not affect the performance of Zipform®.
7. Test the shortcut by either selecting with the right mouse button and selecting Open from the appearing menu, or "double-clicking" the icon. The ZipForm® Login window should appear.

## MAIN SCREEN

The screenshot shows a Windows-style window titled "ZipForm 5.0 [Transaction]". The menu bar includes "File", "Edit", "Tools", "Window", and "Help". The toolbar contains various icons for file operations and editing. The status bar at the bottom indicates "Forms: Non-Exclusive (\"Open\")A Page: 1 Section: Jump: Select One".

The main content area displays the "CALIFORNIA ASSOCIATION OF REALTORS" logo and the title "NON-EXCLUSIVE (\"OPEN\") AGENCY AUTHORIZATION AND RIGHT TO SELL".

1. **NON-EXCLUSIVE RIGHT TO SELL:** [Redacted] John D. Public ("Seller") hereby employs and grants to [Redacted] ("Broker") the non-exclusive, and irrevocable agency right, commencing on (date) [Redacted] and continuing to [Redacted] P. M. on (date) [Redacted] ("Listing Period") to sell or exchange the real property in the City of [Redacted], County of [Redacted], California, described as: [Redacted] ("Property").

2. **TERMS OF SALE:**

A. **LIST PRICE:** The listing price shall be: [Redacted] (\$ [Redacted]).

B. **PERSONAL PROPERTY:** The following items of personal property are included in the above price: [Redacted]

C. **ADDITIONAL TERMS:** [Redacted]

3. **MULTIPLE LISTING SERVICE:** Information about this listing  will,  will not, be provided to a multiple listing service ("MLS") of Broker's selection and the Property sale, price, terms, and financing will be provided to the MLS for publication, dissemination and use by persons and entities on terms approved by the MLS. Seller authorizes Broker to comply with all applicable MLS rules.

4. **TITLE:** Seller warrants that Seller and no other persons have title to the Property, except as follows: [Redacted]

5. **COMPENSATION TO BROKER:**  
Notice: The amount or rate of real estate commissions is not fixed by law. They are set by each Broker individually and may be [Redacted]

To operate ZipForm<sup>®</sup> 5.0 efficiently, a basic understanding of the Main Screen is necessary. To Users experienced in other Windows<sup>®</sup> programs this screen will seem familiar. All functions and features available in ZipForm<sup>®</sup> 5.0 are accessible from the Main Screen. The Main Screen is also where most of the data entry will occur. Taking a few minutes to become familiar with the Main Screen and its functions will quicken the training process.

Displayed in the above illustration are some of the most common attributes of the Main Form window. The Main Form window appears upon the opening of each form.

### QUICK START - COMPLETING A FORM AND PRINTING

NOTE: ZipForm<sup>®</sup> will not operate without proper Registration. Starting ZipForm<sup>®</sup> 5.0 for the first time will offer Registration by Internet, or by calling RE FormsNet, LLC<sup>™</sup> Customer Service.

This Quick Start section is intended for experienced Windows<sup>®</sup> and ZipForm<sup>®</sup> Users.

1. Opening ZipForm<sup>®</sup> 5.0 for the first time will require a User Name and Password. The User Name for initial installations is the word "MASTER". The Password is the word "PASSWORD".
2. With the User Name and Password entered, select the OK button. This will cause the Transaction Wizard dialog box to appear.
3. Select New Transaction the Transaction Wizard dialog box. The [Location Selection](#) menu will appear.
4. Select the location to save (store) the new transaction.
5. Select the OK button.
6. The Transaction Header Dialog Box will open. Once the information in the Transaction Header Dialog Box is completed, select the "OK" button. The Form Manager window will appear.
7. In the Form Manager window, select the Listing icon then select the Cover Sheet (this will be the first form on the list) then select the "OPEN" button.
8. Once the appropriate information has been entered into the Cover Sheet (usually listed first), select File from the Menu Bar, then "OPEN FORM". From the Form Manager select the desired form and select the "OPEN" button.
9. Enter the appropriate information for each field. Remember that the Tab key **or the Enter key** may be used for advancing from one field to the next.
10. With the form completed, select the Printer Icon from the [Toolbar](#) and the form will be printed.

## ZIPFORM PROGRAM CD

### PROGRAM CD

The Program CD contains the core program files needed to use the forms and all program functions. It also contains the installation routine.

Each Program CD Package contains a sticker with a printed serial number. This number is unique to each ZipForm® customer and will be required during installation and also when calling for [Product Support](#). After installation the serial number is available by selecting About from the Help menu of the Menu Bar. The serial number sticker should be placed in this manual, or on the Program CD pouch and stored in a secure area. Any new installation must use this original CD. For Demo Versions, the serial number is "DEMO".

### PROGRAM UPDATES

When the ZipForm® program is modified for performance enhancements or for additional functionality, a Program Update File is created and posted on the ZipForm® Internet Site [www.zipform.com](http://www.zipform.com).

Updating the current ZipForm® Program does not alter any forms or transactions currently residing on the User's computer.

To use the Program Update File:

1. Verify that ZipForm® is closed. After downloading the ZipForm® Program Update File, a dialog box will ask to Open the file, select the OK button.
2. This will invoke the update program.
3. Follow the On Screen Instructions provided by the update program.


NOTE: The above instructions are for standard updates. If the instructions on the web site do not coincide with these instructions then follow the instructions on the web site.

## FORMS

### FORMS

A Form is a document that contains blank spaces, or fields, for insertion of required or requested information. In this ZipForm® documentation the areas of the form that cannot be changed is referred to as the Boilerplate.


### OPENING A FORM

To open a form, select Open Form from the File menu of the [Menu Bar](#), or, select the Form Icon  from the [Toolbar](#). This will launch the Form Manager window. The Forms Category buttons appear on the left side of the [Forms Manager](#) window. This categorizing of the forms speeds the location and retrieval of forms. The Transaction Forms category is the default view that appears when the Form Manager is opened. Each time a new form is opened the title of this form is inserted into the Transaction Forms category.

Locate and select the desired form and select the Open button on the lower right of the Form Manager window. The form will open in the [Main Screen](#) window and the Open Form dialog box will be closed. All the information from the current transaction will be distributed to the appropriate fields of the form. There is no limit to the number of times one form is used in a transaction. See the section, [Using the Form Manager](#), for specific details on opening and managing forms.

### PRINTING A FORM

The Print function prints the displayed form and can be initiated from either the [Toolbar](#) or from the [Menu Bar](#). To

initiate from the [Toolbar](#), select the Printer Icon . Using the Printer Icon will print the form without Print Setup and Print Dialog Boxes. To initiate from the file menu, select File and then select Print Form. The Print Dialog Box will then appear.

By default, the print function will print one copy of all pages of the displayed form to the printer that is currently selected. If the default values are acceptable, select the OK button to begin printing.

There are several modifications that can be made to print jobs. This allows the User the ability to customize the output to achieve the desired results. If modifications are desired, make the desired modifications prior to selecting the OK button.

### SCROLLING THROUGH A FORM

Every form will have a vertical scroll bar located on the right side of the [screen](#). A scroll bar makes it convenient to move vertically through the displayed form page.

- To move up or down one line, position the pointer on the up or down pointers on the scroll bar and click.
- To move up or down one screen, position the pointer above or below the scroll button and click.
- To move a specific amount, position the pointer on the scroll button, click and hold down the left mouse button. Drag the scroll button to the desired location on the scroll bar and release the mouse button.
- Pressing the PgDn (Page Down) or PgUp (Page Up) keys will also move the form up or down one screen at a time.

### GOING TO A DIFFERENT PAGE OF A FORM

When using a multiple page form and the highlight is on the last field of a form page, pressing the Tab key or the Enter key will advance the highlight to the first field of the next page. When a multi-line field is active, the Enter key will advance the cursor to the next line of that field. Pressing the Tab key while holding down the Shift key will move the cursor backward to highlight the last field of the previous page.

To move to a specific page of a multiple page form, select the [Page Menu](#). This menu is a list all the pages of the form currently open in the [Main Screen](#). The User is able to move directly to a specific page with the Page Menu. Move the highlight to the desired page number and select. The desired page will be displayed with the first field active.

To quickly move to the first page of the form, hold down the Ctrl key and press the Home key. To move to the last page of the form, hold down the Ctrl key and press the End key.

### SECTIONS

Many forms are divided into Sections or headings. A Section is a grouping of text pertaining to a particular topic. A typical real estate purchase agreement may have many Sections such as a Terms of Sale section, Financing section, Pest Control section and/or Compensation to Broker section, and so on.

To move to a specific section of a form page, select the Section menu of the [Toolbar](#). This menu lists all the sections of the form currently open in the [Main Screen](#). The User is able to move directly to a specific section with the Section menu. The desired section will be displayed with the first field active.

### FORM BOTTOM MARGIN STAMP

Every form printed with ZipForm<sup>®</sup> contains small print stamps positioned on the lower section of the form above the bottom margin. The stamps may contain:

- Company name and address
- Company phone number
- Company fax number
- Transaction file name
- ZipForm<sup>®</sup> version number
- Date the form was printed

This information furnishes a useful method of tracking progress of transactions and filing reprints or modifications in chronological order.

### COVER SHEET

The Cover Sheet is usually the first form on the form library list in the Form Manager. All general transaction information should be entered prior to opening a specific form. Many forms require information from the Cover Sheet.

The Cover Sheet allows Users to enter information that will be repeated through out the transaction. ZipForm<sup>®</sup> will automatically transfer this information to the corresponding fields on any form opened afterward.

## INTELLICOPY

The User may wish to have information that has been entered on the [Cover Sheet](#) transferred to fields that become related due to the nature of the transaction. For example, when the Listing Broker is also the Selling Broker. Some fields will have a pull-down menu of information from the Cover Sheet that, when selected, will then transfer the information to the corresponding fields.

## FORM UPDATE

The library of forms installed from the Program CD may need to be updated from time to time. When changes are made to a Form Library, whether it's a change on an existing form or an addition or removal of a form, ZipForm® creates an update file for that specific library. This update file will be posted on the ZipForm® Internet Site.

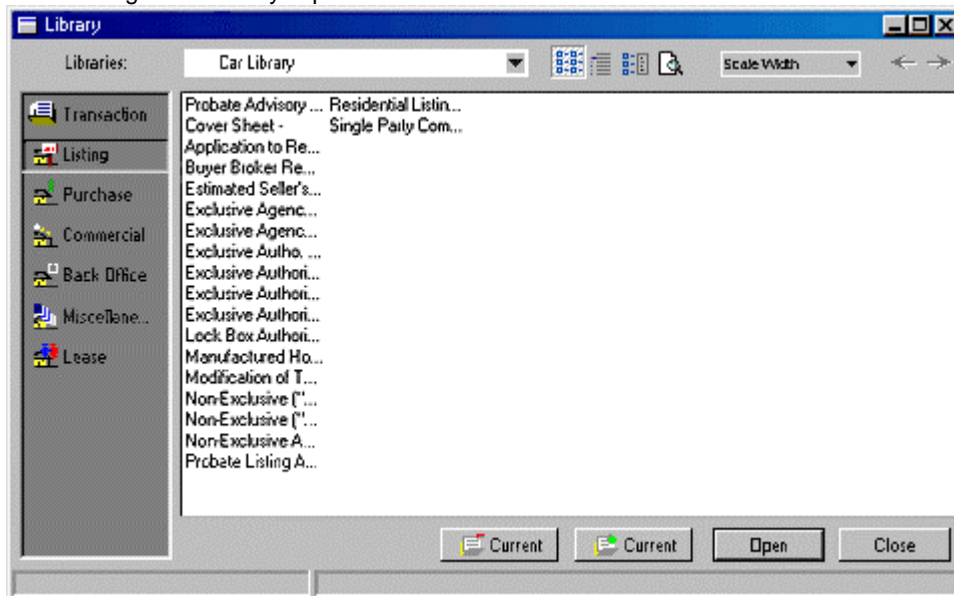
The Form Update is not part of the standard software package needed to run ZipForm®. This is an optional file that is distributed to Users of ZipForm® that already have the forms installed. Performing an update will not change the forms expiration date or number of Users allowed. To extend the expiration date or increase the number of User capability requires the purchase of a new Form Library.

## **FORM MANAGER**

### FORM MANAGER

The ZipForm® Form Manager is a screen that is used to perform multiple form management functions. Open the Form Manager by choosing "Open Form" from the [Menu Bar](#) or the New Form Icon from the [Toolbar](#). The Form Manager's functions include:

- Viewing forms in organized categories
- Automatically maintaining a list of forms used per each transaction
- Adding and removing forms from the transaction category
- Selecting a [Form Library](#)
- Opening forms for editing
- Previewing forms at multiple zoom levels
- Viewing Form Library expiration date



### VIEWING FORMS IN CATEGORIES

The Forms Category buttons appear on the left side of the [Form Manager](#) window. This categorizing of the forms speeds the location and retrieval of forms. The Transaction Forms category is the default view that appears when the Form Manager is opened.

The Transaction Forms Category is a grouping of forms viewable within the Form Manager. ZipForm® automatically generates this list based upon the currently open transaction. Each time a new form is opened the title of this form is inserted into the Transaction Forms category. The User can also add or remove forms in this category from within the Form Manager.

To add a form to the transaction:

1. Select the category of the desired form.
2. Select the title of the desired **form**. The selected form title will then become highlighted.
3. Select the Add (+) Current button located in the lower right of the Forms Manager window.
4. Select the Transaction button to verify the form has been added to the Transaction category.

To remove a form from the transaction:

1. Select the Transaction category to view all form titles for the transaction.
2. Select the title of the form to be removed. The selected form title will then become highlighted.
3. Select the Subtract (-) Current button.
4. The list will refresh with the form removed from to the Transaction category.

NOTE: Adding and removing forms from a transaction in this manner has no affect on the forms stored in the [Form Libraries](#).

### CHANGING FORM LIBRARIES

The default library of forms that is displayed will be the last library used. By selecting a category button, other than the Transaction category button, the form library name will also be displayed in the upper left of the Forms Manager window. Selecting the menu to the right of the library name will reveal the list of available libraries. Selecting a different library name from this menu will display that library of forms in all categories except Transaction. The Form Library may be changed in any category.

### PREVIEWING FORMS

The Preview option enables you to view a form at different zoom levels prior to opening it for editing. To preview a form select the Preview button located in the upper right of the [Form Manager](#) window. The form will appear in the right windowpane.

A View Options menu is located to the right of the Preview button. The different zoom levels are:

- 200%, 125%, 100%, 75%, 50% - Displays the form at the corresponding size. To view sections not visible in the windowpane use the horizontal and vertical scroll bars to reposition the image.
- Scale to Height - Displays the form in its entire length. This view is similar to Full View. The entire height of the form is displayed.
- Scale to Width - The entire width of the form will be displayed in the window and as much of the length that the window will allow. Use the vertical scroll bar to view the top and bottom portions of the form.
- Scale to Fit - This option adjusts the form to fit the Form Preview window.

All pages of a form may be viewed in the Preview window by using the arrow buttons to the right of the View Options menu.

To resize the entire Form Manager window use the standard Windows® techniques. See your Windows® Help documentation for further details on resizing windows.

### OPENING A FORM IN THE FORM MANAGER

Open any form, in any category, from the [Form Manager](#) by selecting the title of the form to highlight and select the Open button in the lower right of the Form Manger window. The form will be opened to the [Main Form](#) window and the Form Manager will be automatically closed.

## FORM LIBRARIES

### FORM LIBRARY

A Form Library is a collection of [Forms](#) generally specific to a state, corporation or association. ZipForm® 5.0 provides many of the necessary forms needed to complete Real Estate Transactions. Contact ZipForm® [Product Support](#) to add or revise form libraries.

### INSTALLING A NEW FORM LIBRARY

New Form Libraries may be loaded from a 3.5" disk, CD, or downloaded from the Internet. ZipForm® 5.0 is able to accommodate numerous form libraries from diverse vendors. Users can have real estate contracts from a Realtor® Association as one library, MLS forms as a second library, rental agreements from a commercial form vendor as the [third library and so on.](#)

### SELECTING A LIBRARY

The default library of forms that is displayed will be the last library used. By selecting a category button, other than the [Transaction](#) category button, the form library name will also be displayed in the upper left of the [Form Manager](#) window. Selecting the menu to the right of the library name will reveal the list of available libraries. Selecting a different library name from this menu will display that library of forms in all categories except Transaction. The [Form Library](#) may be changed in any category.

## FIELDS

### FIELDS

A Field is the only area, or line of a form in which data can be entered, changed or deleted. With most computer monitors ZipForm® 5.0 fields appear as [turquoise](#) by default and are rectangular in shape. When a field becomes active or highlighted it will darken slightly, or open a smaller window.

### EDITING FIELD CONTENTS

The contents of a field may be edited anytime it is active. When a field is first activated, the entire content of the field is selected. Once the User presses any character or numeric key, the selected text will be deleted and replaced with what is being typed.

As with most Windows® software products, to retain or deselect the text, press any of the following keys; left cursor, right cursor, End or Home.

### NUMERIC FIELDS

Fields that receive numeric data are automatically formatted so the data fits the format requirement of the form publisher. On some forms, there may be the need to reformat the numeric data for a different appearance. When entering dollar amounts there is no need to use commas. The commas will automatically be inserted in the appropriate places as numbers are entered into the field.

### DATE FIELDS

ZipForm® 5.0 is setup to automatically format date information to accommodate the requirement of the form text. Dates that are entered and generated in MM/DD/YYYY format (Example: 04/05/2000) will automatically be translated to the format required for each individual date field (Example: April 5, 2000).

When a Date field becomes active, a Calendar menu button will appear to the right in the field. Open the Calendar menu and select the date for the entry. Use the arrow buttons located in the upper corners of the Calendar menu to select a past or future date. The highlighted date in each month indicates month-to-date.

The Calendar menu will close when a date is selected allowing the User to proceed to the next field. The default date of the Calendar menu is Today's Date. To enter Today's Date into an active field, open the Calendar menu and press the Enter key. The Today's Date command is also available from the Edit menu of the [Menu Bar](#).

## READ ONLY FIELDS

Information transferred from the [Cover Sheet](#) that must remain unchanged will be entered into a Read Only Field. There is no way for the User to access a Read Only Field. Fields that are the product of a calculation it is a locked out field and the user cannot change the contents. Normally this type of field contains a dollar amount or an interest rate.

## LOOKUP FIELDS

Some fields, such as cities or states, will "lookup" a list based on the characters being typed. Example: The User types the letter "W" into a state field and a list of states beginning with the letter "W" will appear. The User may select the desired word, name, etc. or continue typing. When a word, name, etc. is typed in that is not currently on the lookup list, ZipForm® will automatically add it to the list for future use. To add, remove, or edit lookup lists:

- Select Options from the Tools menu of the [Menu Bar](#).
- Select the Lookup tab of the Options window.
- Items selected from the Lookup Tags menu will be displayed in the Value window. This is where editing may be conducted.

The Remove button will delete the item selected on the Lookup Tags menu. The Clear button will delete all items on the Lookup Tags menu.

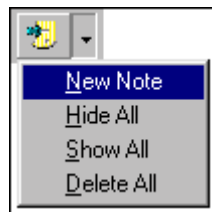
## MULTI-LINE FIELDS

Occasionally, a field will offer more than one line of text to be entered. To move from one line to the next, press the Enter key. The Tab key will still advance the cursor to the next field. Holding the Shift key while pressing the Enter key will reverse the cursor to the previous line.

## **STICKY NOTES**

### POST A NOTE

These electronic "sticky" notes allow Users to "stick" notes anywhere on an open form. This feature is also available in ZipForm® Viewer for [Email Transaction](#) Recipients. Note sheets may be opened from the [Toolbar](#) by selecting New Note from the Notes Icon, or from the [Tools](#) menu, select Notes, then New.



The Note sheet that appears may be altered in a number of ways by selecting the Option Icon in the upper left corner. Grab (press and hold the left mouse button) the lower right corner to change the size of the note sheet. Move the note sheet by grabbing the Title Bar at the top of the note sheet.

Additional Notes options are:

- Hide All - to view text on the active page that is covered by a Note.
- Show All - to undo the Hide All function for the active page having Notes.
- Delete All - to remove all Notes on the active page.

## **TRANSACTIONS**

### TRANSACTIONS

A transaction is the accumulation of all the completed data that is required for a particular client. A typical real estate client for a particular business deal will have one transaction file. Once a transaction has been established, all form data used for that client will be saved in one common file.

Each ZipForm® User has a unique and secure area for their transactions. Transactions may also be password protected for additional security. ZipForm® does not limit the number of transactions that may be created, saved or opened at the same time. This is, however, limited by the amount of [RAM and the hard drive size](#) of the computer being used.

#### LOCATION EDITOR - WHERE TRANSACTION FILES ARE SAVED

ZipForm® allows the Master User to determine where each User stores, or Saves, transactions within the computer or network of computers. By default the transaction files are saved in the folder assigned to the User located on Drive C of the computer. To change the location of the Default Transaction File:

1. Login as Master User (see section on Log On As A Different User).
2. Select Options from the Tools menu of the [Menu Bar](#).
3. The Location Editor window will appear showing a list of possible locations.
4. The User may select one of these possibilities or add a new location by selecting the Add button. Novice Users may find the Browse button an easier approach. However, there will need to be a file folder currently accessible, i.e., a new location folder cannot be created by using the Browse button.
5. When the Add Location dialog box appears, type in the location and select the OK button. Example: C:\My Documents. To save transactions to a floppy, type in: A:\. No folder name is necessary.
6. Select the OK button of the Location Editor window to complete the process.

#### NEW TRANSACTION

The number of transactions that may be created, saved or opened are limited by the size of the [computer RAM and hard drive space](#) being used. To start a new transaction:

1. Select New Transaction from File menu of the [Menu Bar](#). The Location Selection menu will appear.
2. Select the location to save (store) the new transaction. The [Master User](#) determines these locations.
3. Select the OK button. The Transaction Header window will open. This is the first step in creating a [Cover Sheet](#).

#### TRANSACTION HEADER

**Transaction Header**

Real Estate

Transaction Type:  
 Listing  
 Purchase  
 Lease

Property Type:  
 Residential  
 Industrial  
 Commercial  
 Vacant Land

Property Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Buyer Name 1: \_\_\_\_\_

Buyer Name 2: \_\_\_\_\_

Seller Name 1: \_\_\_\_\_

Seller Name 2: \_\_\_\_\_

Template \_\_\_\_\_

Close Cancel

The Transaction Header window appears when a [New Transaction](#) is requested. The [Template](#) menu on the bottom of the Transaction Header window allows Users to select standard transaction templates. Remember that the Transaction Type and Property Type selected on the top of the Transaction Header window affect the transactions appearing in the Template menu.

### OPEN TRANSACTION

To open an existing transaction, select Open Transaction from the File menu of the [Menu Bar](#). This will open the Transaction Index window. All transactions that the logged-in User has saved will be listed here. This is also where the deletion of or the transfer of transaction files to and from the computer's hard drive takes place.

On the left side of the Transaction Index window are the [Location Selection](#) buttons for viewing a list of transactions that have been saved in each location. Locations may also be selected from the Look [Up](#) menu on the top left of the Transaction Index window. Transactions are further categorized in each location by Transaction Type and Property Type. These menus are located on the bottom of the Transaction Index window.

### DELETE TRANSACTION

WARNING: This function will permanently delete the selected transaction.

To delete a transaction:

1. Select Open Transaction from the File menu of the [Menu Bar](#).
2. Locate and select (highlight) the transaction to be deleted.
3. Select the Preview button on the top center of the Transaction Index window. This will display a brief description of the selected transaction. ZipForm<sup>®</sup> recommends previewing transactions prior to deleting to insure the deletion of the desired file. Once a transaction file has been deleted, it cannot be recovered.
4. Select the Delete button on the top right of the Transaction Index window. The list of transactions will refresh showing the selected transaction has been deleted.

### DUPLICATING TRANSACTIONS


For some transactions, it may be desirable to save the data as a duplicate. The "Save Transaction As" function allows the User to keep the existing transaction intact while creating a duplicate transaction file.

To duplicate an open transaction:

1. Select File from the [Menu Bar](#).
2. Select Save Transaction As. This will cause the Transaction Header dialog box to appear.
3. Modify the transaction header information as desired and select the OK button.
4. The new transaction data will be saved. Once the save process is complete, an information dialog box will appear with the new file name and a confirmation that the save process was successfully completed.

### SAVE TRANSACTION

Anytime information is altered, it must be saved to the current transaction file to retain the new information. ZipForm<sup>®</sup> does not use any auto saving routines, as with some programs, so you must save your data on a regular basis. Attempts to load a new transaction or exit the program will open a message to appear prompting the User to Save. This precaution is to avoid losing the data entered during the current session within a transaction.

To save current data to the current transaction file select the Disk Icon  on the Toolbar, or Save from the File menu of the Menu Bar.

Once the save process is complete, an information dialog box will appear with the file name and a confirmation that the save process was successfully completed.

### CLOSE TRANSACTION

ZipForm recommends closing transactions that are not in use as a security measure.

To close an open transaction:

1. Save any alterations to the transaction.

2. Select Close Transaction from the File menu of the [Menu Bar](#). The standard Windows technique of closing a document by selecting the "X" button on the right of the [Menu Bar](#) may also be used.

## EMAIL TRANSACTION

Email transactions without leaving the ZipForm® program. Select Send Mail from the File menu of the [Menu Bar](#). An Email Address Dialog Box will appear. Enter the recipient's Email Address and press the Send Button. The transaction is sent to the Client, or other recipient, as an attached file. ZipForm® Viewer is needed to view the transaction and is downloadable from the Message field. The recipient will only have access to Sticky Notes.

When the transaction is returned via Email, open the transaction file. ZipForm® will ask to replace the existing file. Select the Yes button. If the dialog box does not appear asking to replace the transaction file, the file will be added to [the User's stored transactions](#).

## **TEMPLATES**

### TEMPLATES

A Template is similar to a copy or duplicate of a transaction that may be used repeatedly. Templates are useful in reducing repetitive tasks during the start of new transactions. When several transactions require the same elements such as a broker's [Cover Sheet](#) information, standard clauses, or a group of Transaction Forms, a template will perform these tasks automatically.

### BUILDING A TEMPLATE

A Template is similar to a copy or duplicate of a transaction that may be used repeatedly. To build a template is also similar to duplicating a transaction. To build a template:

1. Open the transaction that will serve as the model for the template.
2. Select Save Transaction As Template from the File menu of the [Menu Bar](#). This will cause a dialog box to appear to allow the template to be named.
3. Type in the template name and select the OK button.
4. To replace an existing template, type in the same name of the existing template. A dialog box will ask if you want to replace the existing transaction. Select the Yes button and the template will be replaced.

### DELETING A TEMPLATE

Templates may be permanently deleted from the Transaction Index window.

1. Select Open Transaction.
2. Select the Template button on the left.
3. Select the Template from the list. WARNING: Verify the highlighted Template name. Once the Template is deleted, it cannot be recovered.
4. Select the Delete button. The Transaction Index window will refresh without the Template name.

## **THE TOOLBAR**

### THE TOOLBAR

The Toolbar is on the top of the ZipForm® Main Screen window. This Toolbar functions as quick access to ZipForm's most common functions. When functions are not applicable to the current editing mode the icons are grayed out.




## **TOOLBAR FUNCTIONS**

### NEW TRANSACTION

The number of transactions that may be created, saved or opened are limited by the size of the [computer RAM and hard drive space](#) being used. To start a new transaction:

1. Select New Transaction from File menu of the [Menu Bar](#). The Location Selection menu will appear.
2. Select the location to save (store) the new transaction. The [Master User](#) determines these locations.
3. Select the OK button. The Transaction Header window will open. This is the first step in creating a [Cover Sheet](#).

## OPENING A FORM

To open a form, select Open Form from the File menu of the [Menu Bar](#), or, select the Form Icon  from the [Toolbar](#).

This will launch the Form Manager window. The Forms Category buttons appear on the left side of the [Forms Manager](#) window. This categorizing of the forms speeds the location and retrieval of forms. The Transaction Forms category is the default view that appears when the Form Manager is opened. Each time a new form is opened the title of this form is inserted into the Transaction Forms category.

Locate and select the desired form and select the Open button on the lower right of the Form Manager window. The form will open in the [Main Screen](#) window and the Open Form dialog box will be closed. All the information from the current transaction will be distributed to the appropriate fields of the form. There is no limit to the number of times one form is used in a transaction. See the section, [Using the Form Manager](#), for specific details on opening and managing forms.


## OPEN TRANSACTION

To open an existing transaction, select Open Transaction from the File menu of the [Menu Bar](#). This will open the Transaction Index window. All transactions that the logged-in User has saved will be listed here. This is also where the deletion of or the transfer of transaction files to and from the computer's hard drive takes place.

On the left side of the Transaction Index window are the [Location Selection](#) buttons for viewing a list of transactions that have been saved in each location. Locations may also be selected from the Look In menu on the top left of the Transaction Index window. Transactions are further categorized in each location by Transaction Type and Property Type. These menus are located on the bottom of the Transaction Index window.

## SAVE TRANSACTION

Anytime information is altered, it must be saved to the current transaction file to retain the new information. ZipForm<sup>®</sup> does not use any auto saving routines, as with some programs, so you must save your data on a regular basis. Attempts to load a new transaction or exit the program will open a message to appear prompting the User to Save. This precaution is to avoid losing the data entered during the current session within a transaction.

To save current data to the current transaction file select the Disk Icon  on the Toolbar, or Save from the File menu of the Menu Bar.

Once the save process is complete, an information dialog box will appear with the file name and a confirmation that the save process was successfully completed.

## PRINT

The Print command automatically transfers the active form or transaction. Printing is completely automatic and there are no special fonts or additional actions required to print perfect forms. ZipForm<sup>®</sup> will print to any Windows<sup>®</sup> compatible printer.

Print quality is related to the printer in use. When using ink jet or laser printers, the printed output looks virtually identical to pre-printed forms from a commercial printing company. The text that has been added to each form is printed in a contrasting font for easy identification and is perfectly aligned within the appropriate field.

The performance of printing varies depending on the configured printer. Overall performance of printing is dependent on the speed capabilities of the printer and the speed of the host computer. An ink printer, for example, will print a form image that is nearly indistinguishable from a laser printer image yet prints substantially slower than a laser printer. Dot matrix printers print very slow and print a low resolution image resulting in a much lower quality. For this reason, dot matrix printers are not recommended for printing forms a client will be viewing. Dot matrix printers may be used for interoffice drafts.

## CUT; COPY; PASTE

The Cut, Copy and Paste features allow the User to duplicate or remove part or all of field text from one field and insert it or paste it into another field without retyping. The Cut and Copy functions operate very similar to each other with one exception. Using Cut will remove the selected text.

To cut or copy text from one field and paste to other fields:

1. Position the Select Text I-Bar at the beginning of the text to be cut or copied, press and holding the left mouse button while dragging the Select Text I-Bar over the text to be cut or copied. The text will become white with a red background.
2. Select the Cut Icon (scissors) to remove highlighted text, or click Copy Icon (dual pages) to copy highlighted text.
3. Select the point of insertion by positioning the Select Text I-Bar, press and release the left mouse button.
4. Select the Paste Icon (clipboard). The Paste command may be repeated. The text that is ready for pasting will not change until other text is copied or cut.

These commands are also available from the Edit menu of the [Menu Bar](#).

## CHARACTER CASE SETTINGS

Change the Character Case Settings of the text in an active field. This is useful for emphasizing important text. The "U" button is for Upper Case, the "L" button is for Lower Case, and the "C" button is for Capitalize.

**U**.....The Upper Case feature will change the case of the entire field to upper case. For example, if the content of a field is: "The seller will furnish a pest control report", the text will convert to: "THE SELLER WILL FURNISH A PEST CONTROL REPORT".


**L**.....The Lower Case feature will change the case of the entire field to lower case. For example, if the content of a field is "The SELLER will furnish a Pest Control Report", the text will convert to "the seller will furnish a pest control report".

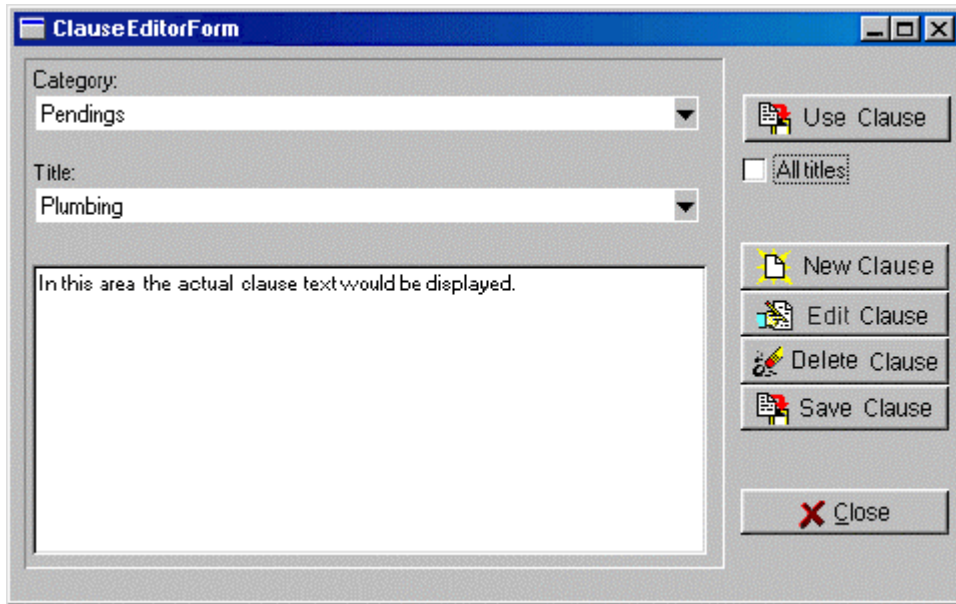
**C**.....The Capitalize feature will change the case of the first character of each word to upper case. For example, if the content of a field is "The seller will furnish a pest control report", the text will convert to: "The Seller Will Furnish a Pest Control Report".

These commands are also available from the Edit menu of the Menu Bar.

## CLAUSE EDITOR

Real estate forms generally contain one or more narrative sections for the purpose of augmenting the form boilerplate with text that specifically pertains to a particular transaction. Fields that have a MEMO prefix are Multiple Line Fields. To edit these fields simply press the Enter key when the field is active and the Memo Editor will appear. Enter text in

the Menu Editor or choose the Pencil Icon  to bring up the Clause Editor.




Many transactions could use a standard or modified clause similar to using a template. Reusing clauses may eliminate a substantial amount of work composing redundant clauses and enhance accuracy of the transaction. The ZipForm® clause editor allows the User to compose and catalog an unlimited number of clauses. Once a clause has been entered into the clause library, it can be recalled at any time by its description, and used with any form. Clauses are stored in a hierarchical system. Every clause is stored under a category title in the Clause Editor. Selecting a different category from the Category menu displays the Clause Titles menu.

#### DIALOG VIEW EDITOR

The Dialog View editor is used to enter data into the fields of a form without using the form itself. As an option to using the form for data entry ZipForm® has provided the User with the ability to view and enter data in a listing format. Some Users may prefer this method of data. In this mode only the fields and a short field description are displayed.

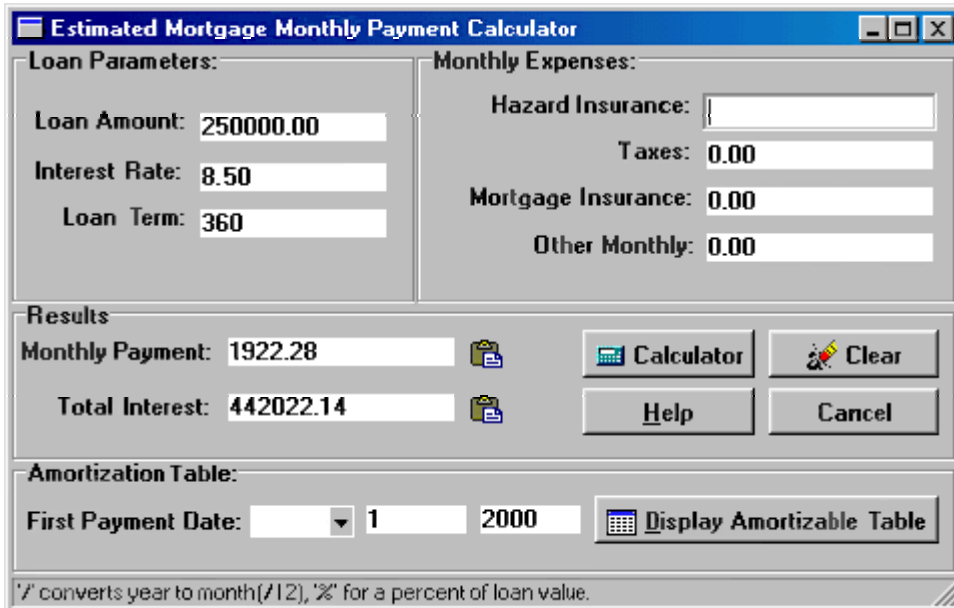
Field	Value
Buyer #1 Name	Ime Buyer
297	Ime
298	
299	Buyer
First Buyer's Social Security Number	
Buyer Street Address	500 Andrew Jackson Pkwy.
Buyer City	Lotsado
Buyer State	ID
Buyer Zip Code	33333
County	
Buyer Home Phone Number	
Buyer Business Phone Number	(111)555-1212
Buyer Fax Number	
Buyer1.CellPhone	
Buyer1.EmailAddress	

Selecting the Dialog View Icon button  on the [Toolbar](#) will access the Dialog View Editor. When the Dialog View appears it displays all the data entry fields that are on the current page of the open form in use. On the left with the gray background are short field descriptions. On the right with the white background are the fields where the transaction information is entered.

Select the Dialog View button again  to return to the form view.

### LOAN PAYMENT CALCULATOR

The Loan Payment Calculator will compute amortized monthly mortgage payments based on a loan amount, loan term and interest rate.



The screenshot shows a dialog box titled "Estimated Mortgage Monthly Payment Calculator". It is divided into several sections:

- Loan Parameters:** Loan Amount: 250000.00, Interest Rate: 8.50, Loan Term: 360.
- Monthly Expenses:** Hazard Insurance: (empty), Taxes: 0.00, Mortgage Insurance: 0.00, Other Monthly: 0.00.
- Results:** Monthly Payment: 1922.28, Total Interest: 442022.14. There are "Calculator" and "Clear" buttons next to these fields.
- Amortization Table:** First Payment Date: (dropdown) 1 2000. There is a "Display Amortizable Table" button.

At the bottom, a note states: "/ converts year to month(/12), '%' for a percent of loan value."

To calculate a loan payment:

1. Select calculator icon button on the Toolbar, or select Payment Calculator from the Tools menu of the [Menu Bar](#). The Loan Payment Calculator dialog box will appear.
2. In the appropriate fields, enter the loan amount, term (in months) and interest rate. Also fill in all Monthly Expenses that may apply. The payment field will reflect amortized monthly payment.
3. Select the [PASTE](#) button next to the Monthly Payment or Total Interest field to insert the calculated amount to the active field on the form.

The Calculator button of the Loan Payment Calculator opens the Microsoft® Windows® Calculator that is also accessible from the Start menu of most Windows® operating systems.

Fields that are the result of a calculation are non-editable. Like [Cover Sheet](#) fields that carry over, these fields will turn red when the cursor enters the field. The number (usually a dollar amount) cannot be changed by the User.

### PAGE SIZE DISPLAY

Users may change how forms are displayed on screen without effecting the printed outcome of the form. The Scale Width menu offers the following options:

- 200%, 125%, 100%, 75%, 50% - Displays the form at the corresponding size. To view sections not visible in the windowpane use the horizontal and vertical scroll bars to reposition the image.
- Scale to Height - Displays the form in its entire length. This view is similar to Full View. The entire height of the form is displayed.
- Scale to Width - The entire width of the form will be displayed in the window and as much of the length that the window will allow. Use the vertical [scroll bar](#) to view the top and bottom portions of the form.
- Scale to Fit - This option adjusts the form to fit the Form Preview window.

- Change Margins - Selecting Change Margins will eliminate the margins, or white space, from the viewing window. The Change Margins feature acts as a "toggle" switch so that the User may undo, or go back to having the margins on the screen.

To resize the entire [Main Screen](#) window use the standard Windows® techniques. See your Windows® Help documentation for further details on resizing windows.

### FORM MENU

This menu lists all forms built into the open transaction. The User is able to move directly to any form of a transaction with the Form Menu.

### PAGE MENU

When using a multiple page form and the highlight is on the last field of a form page, pressing the Tab key or the Enter key will advance the highlight to the first field of the next page. When a multi-line field is active, the Enter key will advance the cursor to the next line of that field. Pressing the Tab key while holding down the Shift key will move the cursor backward to highlight the last field of the previous page.

To move to a specific page of a multiple page form, select the [Page Menu](#). This menu is a list all the pages of the form currently open in the [Main Screen](#). The User is able to move directly to a specific page with the Page Menu. Move the highlight to the desired page number and select. The desired page will be displayed with the first field active.

To quickly move to the first page of the form, hold down the Ctrl key and press the Home key. To move to the last page of the form, hold down the Ctrl key and press the End key.

### SECTION MENU

Many forms are divided into Sections or headings. A Section is a grouping of text pertaining to a particular topic. A typical real estate purchase agreement may have many Sections such as a Terms of Sale section, Financing section, Pest Control section and/or Compensation to Broker section, and so on.

To move to a specific section of a form page, select the Section menu of the [Toolbar](#). This menu lists all the sections of the form currently open in the [Main Screen](#). The User is able to move directly to a specific section with the Section menu. The desired section will be displayed with the first field active.

### JUMP MENU

These menus allow the User to move directly to a specific section or form that relates to the form currently open in the [Main Form](#) window but is not necessarily built into the transaction. The number and type of sections and forms listed on the drop-down menu will change for each form. Selecting a form from the Jump menu will build the form into the transaction.

### **STRIKE OUT TEXT**

#### STRIKE OUT TEXT

WARNING: Strike Outs are prohibited in some areas and may be disabled. RE FormsNet, LLC™ is not responsible for the illegal use of this or any other feature of this product.

To eliminate a word, phrase or a larger portion of the text from the form boilerplate, ZipForm® 5.0 provides a Strike Out function. With the Strike Out feature, the integrity of the form and form boilerplate is not changed. Only the designated text that contains the strikeout characters. This effectively eliminates the marked text from consideration as part of the boilerplate. For example:

This is what will appear ~~on the printed form after~~ the text has been struck out.

The Strike Out text is saved with the active transaction and will appear each time the form is used within the same transaction. The printed form will also have a solid black line across the struck out text.

When a transaction is saved as a Template the strikeouts placements are saved as well. This Template can then be re-called on subsequent new transactions with the strikeouts already placed. See the section on [Templates](#) to save a transaction as a Template.

### USING STRIKE OUT

WARNING: Strike Outs are prohibited in some areas and may be disabled. RE FormsNet, LLC™ is not responsible for the illegal use of this or any other feature of this product.

The Strike Out function may be activated from the Tools menu of the [Menu Bar](#), or by the Strike Out Icon button of the [Toolbar](#). With Strike Out activated, the mouse pointer changes to a Link Select (hand). Position the index finger of the Link Select at either end of the line of text to be struck. Hold the left mouse button down while moving the Link Select across the text, highlighting the text. Select the Strike Out Icon again to deactivate.

### REMOVING A STRIKE OUT

WARNING: Strike Outs are prohibited in some areas and may be disabled. RE FormsNet, LLC™ is not responsible for the illegal use of this or any other feature of this product.

The User may also remove all, or part of, the Strike Out. Activate the Strike Out from either the [Toolbar](#) icon, or select the Tools menu of the [Menu Bar](#). Move the highlight to Strike Out and select Edit Strike Out.

Move the Link Select to the struck out text and the text will become highlighted. Hold the left mouse button down while moving the Link Select across the text, removing the highlight and deactivate Strike Out as before.

To clear all Strike Outs, select the Tools menu of the Menu Bar. Move the highlight to Strike Out and select Clear Strike Out. ZipForm® automatically removes all Strike Outs from the active page.

## **SPELLCHECK**

### SPELLCHECK

The Spellcheck feature is used to rapidly verify the spelling of a selected word, word group, field or all filled in fields of the active form. The ZipForm®5.0 base dictionary contains 150,000 words. ZipForm®5.0 also allows unlimited additions to one or more [custom User dictionaries](#). This permits additions of words that are specific to a particular market and may not be found in the common unabridged dictionary.

### ACTIVATING SPELLCHECK

Spellcheck starts with the active field. To Spellcheck one word or word group, highlight the text as in the [Cut or Copy](#) procedure. When Spellcheck is completed checking the selected text, a dialog box will appear asking if Spellcheck should check the entire form. Spellcheck will start from the first field of the form and continue through the remaining fields. If Spellcheck completes the task without encountering misspelled words, the Spellcheck Completed dialog box appears on the screen. When Spellcheck encounters a word that is not in the base dictionary or in an active [Custom Dictionary](#), the Word Not Found In Dictionary dialog box will appear offering correct spelling options.

### DEACTIVATING SPELLCHECK

To cancel Spellcheck while the Word Not Found... dialog box is open, select the Cancel Spellcheck button or press the Esc key.

### CORRECTING MISSPELLED WORDS

When Spellcheck encounters a word that is not in the base dictionary or in an active custom dictionary, the Word Not Found In Dictionary dialog box will appear offering correct spelling options. The word in question appears in the Word Not Found field with a list of one or more logical replacements displayed in the suggested word list box.

- The first word on the list (most logical replacement) will be displayed in the Replace With field and will replace the originally typed word when the Replace button is selected.
- To select a different word from the list, select the desired word and then select the Replace button.
- To automatically replace each occurrence of a flagged word throughout the form, select the Replace All button.
- To prompt for each replacement, select Prompt Replace button.

If the misspelled word was intentional, an acronym or has meaning specific to a particular business or market the User may ignore the word or add the word to the active custom dictionary. To ignore the word one time and proceed with the spell-checking, select the Ignore button. To ensure the Spellchecker does not stop on the word again, select the Ignore All button. To add the word to the active [Custom Dictionary](#), select the Add to Custom button.

### CUSTOM DICTIONARY

The [Custom Dictionary](#) stores User specified words that are not found in the [Base Dictionary](#). When active, the [Custom Dictionary](#) will prevent the Spellcheck feature from stopping on words that may be industry-specific, acronyms or special abbreviations. To activate the [Custom Dictionary](#):

1. Select Options button from the Word Not Found... dialog box. This will cause the Spell Options dialog box to appear.
2. Select Open Custom button.
3. Select the desired [Custom Dictionary](#) or establish a new custom dictionary.

### ADDING WORDS TO THE CUSTOM DICTIONARY

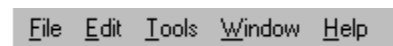
If the misspelled word was intentional, an acronym or has meaning specific to a particular business or market the User may add the word to the active [Custom Dictionary](#). To add a word in the Replace With field by selecting Add To Custom button. Additional words can be entered to the Custom Dictionary by deleting the word in the Replace With field and typing the next word and select Add To Custom button.

### **THE MENU BAR**

#### THE MENU BAR

Located on the top of the [Main Screen](#) window between the ZipForm<sup>®</sup> for Windows<sup>®</sup> Titlebar and [Toolbar](#), the Menu Bar is a horizontal list of menu titles. Each title contains one drop-down menu for selection of individual commands. Many of the Menu Bar commands will offer the [Keyboard Shortcut](#) for that specific command.

Command titles that appear as grayed out text means the command is not currently available. Example of grayed out areas: only a few Menu Bar functions are solid black when ZipForm<sup>®</sup> is open without an open form. Many more functions become enabled (solid black) after opening a form.



### **PRINTING**

#### PRINTING

The Print command automatically transfers the active form or transaction. Printing is completely automatic and there are no special fonts or additional actions required to print perfect forms. ZipForm<sup>®</sup> will print to any Windows<sup>®</sup> compatible printer.

Print quality is related to the printer in use. When using ink jet or laser printers, the printed output looks virtually identical to pre-printed forms from a commercial printing company. The text that has been added to each form is printed in a contrasting font for easy identification and is perfectly aligned within the appropriate field.

The performance of printing varies depending on the configured printer. Overall performance of printing is dependent on the speed capabilities of the printer and the speed of the host computer. An ink printer, for example, will print a form image that is nearly indistinguishable from a laser printer image yet prints substantially slower than a laser printer. Dot matrix printers print very slow and print a low resolution image resulting in a much lower quality. For this reason, dot matrix printers are not recommended for printing forms a client will be viewing. Dot matrix printers may be used for interoffice drafts.

#### PRINTING A BLANK FORM

**WARNING:** Print Blank Form is prohibited in some areas and may be disabled. RE FormsNet, LLC<sup>™</sup> is not responsible for the illegal use of this or any other feature of this product.

An active form may be printed with blank fields even when text has been entered and saved. To print an active form:

1. Select Print Blank Form from the File menu of the [Menu Bar](#). The Print dialog box will open.
2. Select Print Range and the number of Copies to be printed.
3. Select the OK button.

### PRINTING A SAMPLE FORM

This option will print the current form on the screen with the current transaction. The difference is that it will place the word SAMPLE across the page. The word SAMPLE will appear gray to allow the form's text to show through. Printing a Sample Form prohibits a form intended to be a proof from becoming confused as a valid contract. To Print a Sample Form:

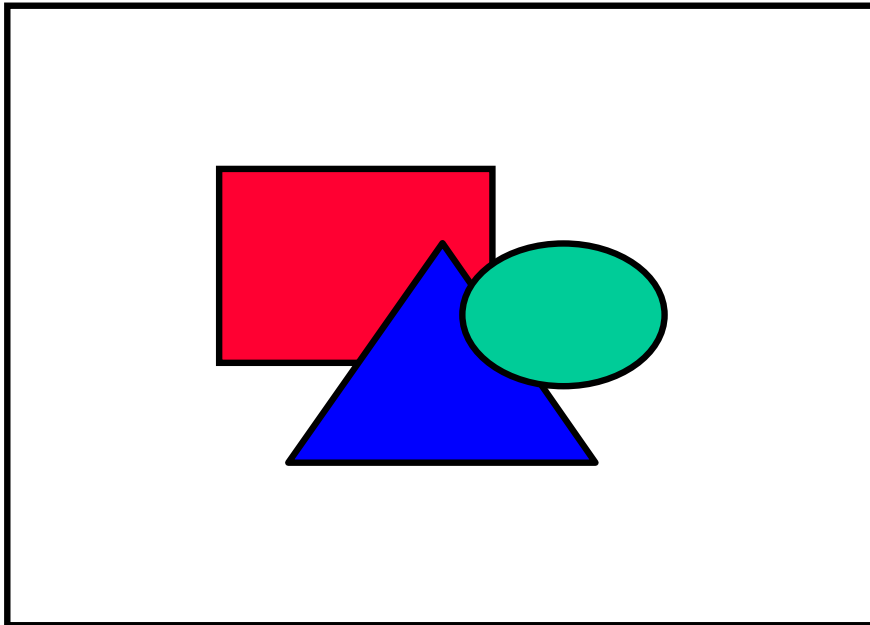
1. Select Print Sample Form from the File menu of the [Menu Bar](#). The Print dialog box will open.
2. Select Print Range and the number of Copies to be printed.
3. Select the OK button.

### **PRINT SETUP DIALOG BOX**

#### THE PRINT SETUP DIALOG BOX

Print Setup allows the User to select a specific printer previously loaded into Windows<sup>®</sup> and/or change the paper sources. To initiate the Print Setup dialog box:

1. Select Print Setup from the File menu of the [Menu Bar](#). The current printer name will appear in the Printer Name menu with a brief description of the printer and its location within the computer network below the name.



2. To change printers, pull down the Printer Name menu.
3. Select the name of the desired printer.
4. Select the Enter button. There should be no need to change [Paper Size](#), [Source](#) or [Orientation](#) unless a problem occurs.

### PAPER ORIENTATION

This option controls the orientation of the print on the paper. There should be no need to change the Paper Orientation unless a problem occurs. The default setting is Portrait since most ZipForm<sup>®</sup> forms are designed with a Portrait layout. When a form prints lengthwise (Landscape) on the paper ZipForm<sup>®</sup> will automatically change the orientation prior to printing. However, the User may choose to change the Paper Orientation by selecting the setting's label or check box. The illustrated sheet of paper will be reoriented as a visual reference.

## PAPER SIZE

Paper Size refers to the size of paper you have in your printer. The default Paper Size should be set to Letter. When the form that is being printed is not letter size ZipForm® will automatically change the paper size prior to printing. However, the User may choose to change the Paper Size manually by pulling down the menu and selecting one of the options from the menu. Note: Forms that have been designed for a specific sized paper may not be "forced" to print on a different sized paper.

## PAPER SOURCE

Laser printers often offer several trays for different paper sizes, colors and qualities. The User may change the tray, or source, by pulling down the Paper Source menu and selecting one of the options from the menu.

## **SECURITY AND USERS**

### SECURITY AND USERS EXPLAINED

ZipForm® has a number of security features built in to ensure the User's transactions remain un-viewable to others. Although it is not necessary to know all these features to operate ZipForm®, the following explanation is provided to give the User a grasp of how ZipForm® operates.

When transactions are saved in ZipForm® the transaction files are stored with specific information pertaining to the User. Without this information, no one has access to the transaction files.

The User Manager in ZipForm® controls the management of User's names, passwords and privileges. See the section on [The User Manager](#) for further details.

### LOGGING IN TO ZIPFORM®

When the program is started ZipForm® presents an opening screen that will appear as the program loads. This screen contains version data and copyright information. During installation of ZipForm® the User name is "MASTER" and the password is "PASSWORD".

As a password is typed, the text in the password field will always appear as asterisk (\*) characters, regardless of characters typed. This is to ensure password confidentiality.

Once the password has been entered, select the OK button to continue. If the password was not entered correctly, an error dialog box will appear.

The Master User has the ability to change and maintain passwords and User areas. Call ZipForm® [Product Support](#) for password recovery.

### LOG ON AS DIFFERENT USER

To log on as a different User without exiting ZipForm® by selecting Log On as Different User from the Tools menu of the [Menu Bar](#). This would commonly be used in a [Multi-User](#) environment in which Users are sharing the same computer. Only transactions for the currently logged on User will be accessible.

### MASTER USER

The Master User is similar to the function of a System Administrator in that this User has control of specific functions that are not available to other Users. The Master User can not be deleted. After the first installation of the ZipForm® program the password for the Master User is PASSWORD.

When logged into ZipForm® as the Master User the following functions are enabled:

- Loading Forms into ZipForm®
- User management functions, which include adding users, deleting users and allowing access to forms.
- Internet Privileges

[These functions are](#) not accessible to Users other than the Master User unless the User has been given Administrative Rights by the Master User.

The Master User is intended as an administrative function only and should not be considered for daily use. Even when there is only one User of the ZipForm<sup>®</sup> program another User should be created in the [User Manager](#). The Master User should log on as that User for routine work in the ZipForm<sup>®</sup> program.

## THE USER MANAGER

### THE USER MANAGER

One major advantage of ZipForm<sup>®</sup> is that each User can maintain a separate area on the computers hard drive or network to store transactions. This mitigates the chance of one User accidentally modifying a transaction of another User. Additionally it allows for secure transaction data. The User Manager is used for the purpose of adding and removing Users and allowing or restricting access to forms.

Each User is assigned a password. The Master User through the User Manager does this. ZipForm<sup>®</sup> has no limitation on the number of Users that can be configured to the system. However, form libraries are configured for a pre-determined number of Users. For example, if there are ten Users configured and a form library only accommodates five Users, then only the first five configured Users will have access to the forms. To access the User Manager:

1. Log on as the Master User. The default User name is MASTER and the password is PASSWORD unless the Master User has changed it.
2. Select Users Manager from the Tools menu of the [Menu Bar](#). The User Manager dialog box will appear.

### ADDING A NEW USER

ZipForm<sup>®</sup> has no limitation on the number of Users that can be configured to the system. However, form libraries are configured for a pre-determined number of Users. Each time a User is added, it will appear on the next available item on the bottom of the list. Therefore, be aware that the number of Users is directly associated with the User capacity or volume allowed by the form library.

To add a User:

1. Select User Manager from the Tools menu of the [Menu Bar](#). The User Manager window will appear.
2. Select the Add button. The New User dialog box will appear.
3. Enter an appropriate name for the new User, usually the first or last name of the User.
4. Select the OK button. The User Properties window will appear.
5. Enter a password in the Password field. The remaining information in the User Properties window may be completed by the User.
6. Select the OK button to complete the function.

### DELETE A USER

Removing a User will disallow that User access to ZipForm<sup>®</sup>. The deleted User's transaction files will remain and still be accessible by the Master User. To delete a User:

1. Select User Manager from the Tools menu of the [Menu Bar](#). The User Manager window will appear.
2. Select the User to be deleted.
3. Select the Remove button. The User's name will be removed.
4. Select the OK button.

Note: [The Master User](#) cannot be deleted.

### CHANGING PASSWORDS

Periodical changing of passwords may ensure continued security of transaction files. Maintaining an individual password can be the responsibility of the individual User. All subordinate (non-master) Users have the ability to change their own passwords. However, in order to change a password, the current password will need to be entered.

To change a password:

1. Select User Manager from the Tools menu of the [Menu Bar](#). The User Manager window will appear.
2. Select the User name.
3. Select the Properties button. The User Properties window will appear.
4. Highlight the asterisks in the Password field and press the Delete key to remove the current password.

5. Enter the new password in the Password field.
6. Select the OK button to employ the new password.

### ALLOWING USERS ACCESS TO FORMS

Access to a Form Library can be turned off and on within the [User Manager](#). Only the Master User can turn on and off access to Form Libraries. To control User access to a Form Library:

1. Select User Manager from the Tools menu of the [Menu Bar](#). The User Manager window will appear.
2. Select the User name.
3. Select the Properties button. The User Properties window will appear.
4. Select the Libraries Tab. A list of libraries will appear, each with a check box to the left of the library name. Libraries currently available to the User will have a check mark in the check box.
5. Select the check boxes of the libraries to be accessed by the User. Or select the Select All button to allow access to all the libraries on the list.
6. Select the OK button.


### **DATA IMPORT/EXPORT**

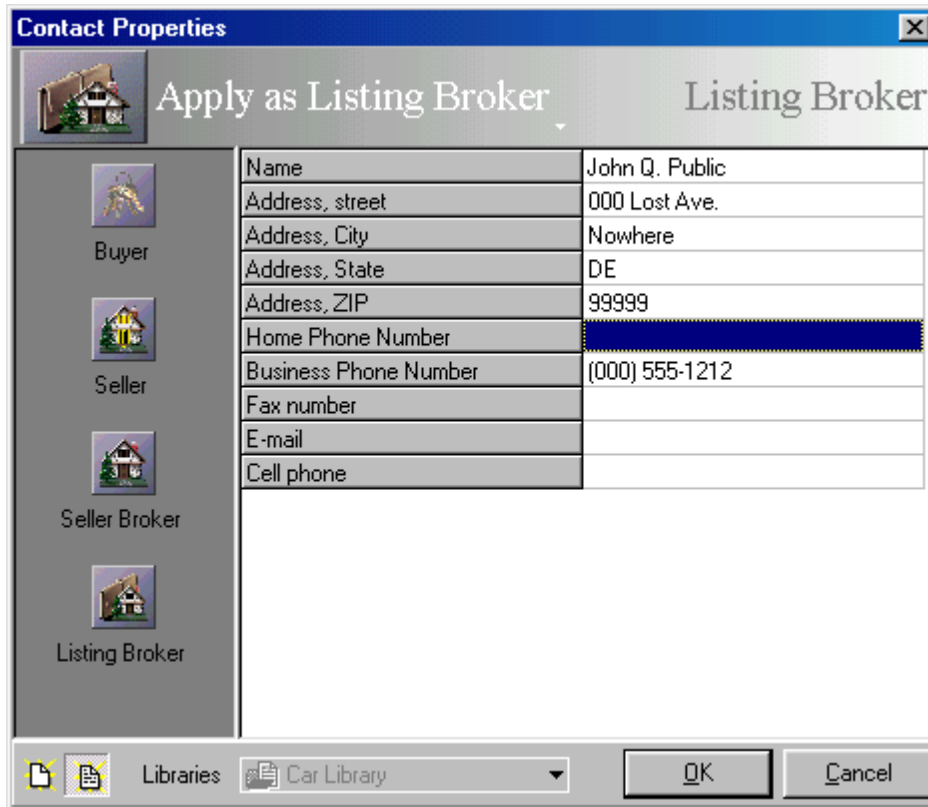
#### DATA IMPORT AND EXPORT

Some of the information used in ZipForm<sup>®</sup> may be imported from, or exported to, other "Contact Management" software products such as Microsoft<sup>®</sup> Outlook<sup>®</sup>, Top Producer<sup>®</sup>, or PREP software.

**WARNING:** Using this feature with Contact Management software products other than Microsoft<sup>®</sup> Outlook<sup>®</sup> requires the installation of an XML Standard from the specific software firm. Due to the technical nature of this procedure, this document will address the use of Microsoft<sup>®</sup> Outlook<sup>®</sup> only.

To keep contact information in an Microsoft<sup>®</sup> Outlook<sup>®</sup> file:

1. Open Microsoft<sup>®</sup> Outlook<sup>®</sup> and select the Contacts button on the left.
2. Select the New Contact button of the [Toolbar](#) and enter the specific information for one of the parties of a new transaction.
3. Repeat Step 2 for each party of this transaction.
4. Select a contact's name, then select the [ZipForm<sup>®</sup>](#) icon button  on the right of the Toolbar. The Contact Properties window will appear.

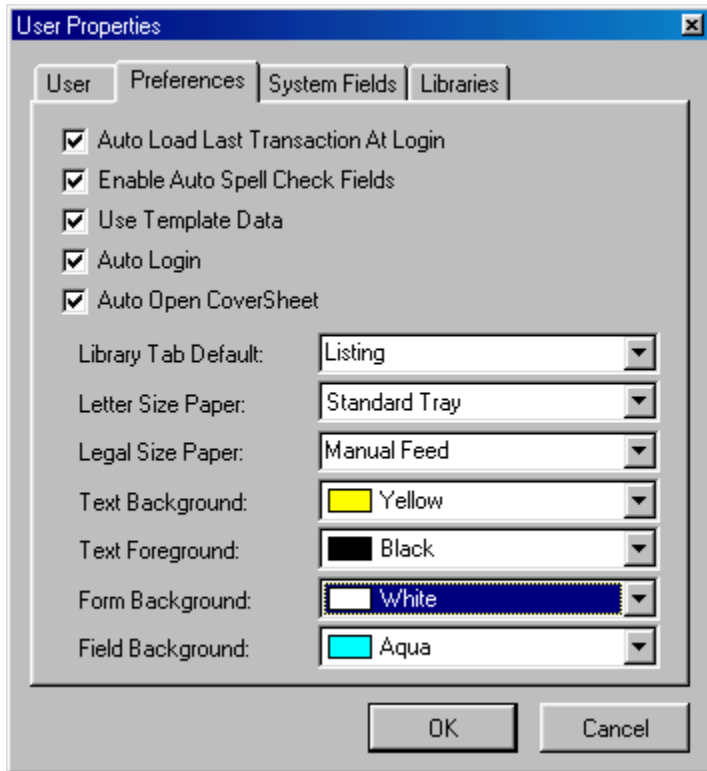


5. Select the appropriate button on the left that indicates this contact's participation in the transaction and the Apply As button.
6. Select the New Transaction button on the bottom left of the Contact Properties window. This will enable the Libraries menu. Select the desired Library, then the OK button.
7. The Location dialog box will appear. Select the location to save (store) the new transaction.
8. The contact's information will appear in the appropriate fields of the Transaction Header dialog box.
9. Select the Close button and repeat Steps 4 and 5.
10. Select the Existing Transaction button on the bottom left of the Contact Properties window, then the OK button.
11. The Transaction Index window will appear. Select the transaction and Open button. The contact's information will appear in the appropriate fields of the Transaction Header dialog box.
12. Select the Close button and repeat for each contact participating in the transaction.

## USER SETTINGS

### USER SETTINGS (PREFERENCES)

Each User may customize certain aspects of the program to best suit personal preferences. Select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select the Preferences tab.



#### AUTO LOAD LAST TRANSACTION AT LOGIN

This will automatically load the last active transaction and open the last active form when the User exited the system. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select the Preferences tab and the check box or label.

#### ENABLE AUTO SPELL CHECK FIELDS

This will automatically invoke Spellcheck on a field as soon as the User leaves the field causing the field to become inactive. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select the Preferences tab and the check box or label.

#### USE TEMPLATE DATA

This allows the User to access the [Template](#) menu of the [Transaction Header](#) window. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select the Preferences tab and the check box or label.

#### AUTO LOGIN

When a local computer has only one ZipForm<sup>®</sup> User, the Login Screen may be bypassed. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select the Preferences tab and the check box or label.

#### AUTO OPEN COVER SHEET

Automatically opens to the [Cover Sheet](#) when a transaction is opened. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select the Preferences tab and the check box or label.

### LIBRARY TAB DEFAULT

Specifies which form library is displayed when the Forms Manager window is opened. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a library from the Library Tab Default menu of the Preferences tab.

### LETTER SIZE PAPER

Specifies the paper tray to use for letter size paper. Selecting the Auto Select option is satisfactory since the most printers will detect if the page size requires letter size paper and automatically switch to the correct paper tray. Changing this option may be necessary when using a manual tray or when the printer has unique features that necessitate special paper handling. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a tray from the Letter Size Paper menu of the Preferences tab.

### LEGAL SIZE PAPER

Specifies the paper tray to use for legal size paper. Selecting the Auto Select option is satisfactory since the most printers will detect if the page size requires legal size paper and automatically switch to the correct paper tray. Changing this option may be necessary when using a manual tray or when the printer has unique features that necessitate special paper handling. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a tray from the Legal Size Paper menu of the Preferences tab.

### TEXT BACKGROUND

Control the color of a field as the field becomes active or highlighted. This setting is for display purposes only and does not affect the printing of forms. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a color from the Text Background menu of the Preferences tab.

### TEXT FOREGROUND

Control the color of the text in a field as the field becomes active or highlighted. This setting is for display purposes only and does not affect the printing of forms. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a color from the Text Foreground menu of the Preferences tab.

### FORM BACKGROUND

Control the background color of an open form. This setting is for display purposes only and does not affect the printing of forms. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a color from the Form Background menu of the Preferences tab.

### FIELD BACKGROUND

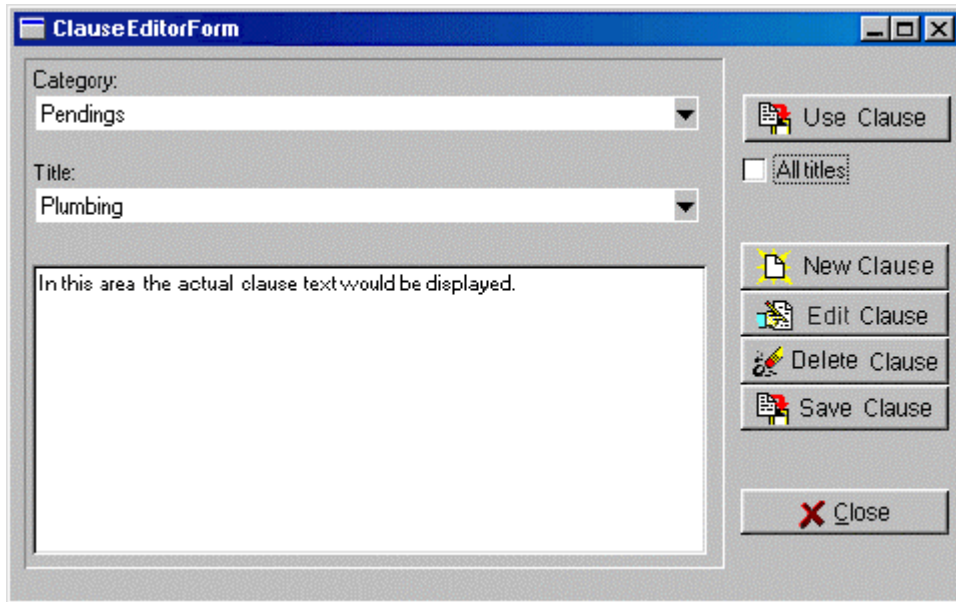
Control the color of inactive fields. This setting is for display purposes only and does not affect the printing of forms. To change this setting select User Manager from the Tools menu of the [Menu Bar](#). Select the User name and Properties button. Select a color from the Field Background menu of the Preferences tab.

## **CLAUSE EDITOR**

### CLAUSE EDITOR

Real estate forms generally contain one or more narrative sections for the purpose of augmenting the form boilerplate with text that specifically pertains to a particular transaction. Fields that have a MEMO prefix are Multiple Line Fields. To edit these fields simply press the Enter key when the field is active and the Memo Editor will appear. Enter text in

the Memo Editor or choose the Pencil Icon  to bring up the Clause Editor.



Many transactions could use a standard or modified clause similar to using a template. Reusing clauses may eliminate a substantial amount of work composing redundant clauses and enhance accuracy of the transaction.

The ZipForm<sup>®</sup> clause editor allows the User to compose and catalog an unlimited number of clauses. Once a clause has been entered into the clause library, it can be recalled at any time by its description, and used with any form. Clauses are stored in a hierarchical system. Every clause is stored under a category title in the Clause Editor. Selecting a different category from the Category menu displays the Clause Titles menu.

#### CREATE A NEW CLAUSE

Clauses may be added to the Clause Editor by typing or [Copy and Pasting](#) a clause that already exist. To add a clause:

1. Select the Clause Editor Icon button from the [Toolbar](#). The Clause Editor is also accessible from the Tools menu of the [Menu Bar](#). The Clause Editor Form window will appear.
2. Select the New Clause button on the right of the Clause Editor Form window.
3. Type in the Category and Title in their respective fields.
4. Type, or paste the clause in the Clause Text field.
5. Select the Save Clause button.

#### USE AN EXISTING CLAUSE

1. Select the Clause Editor Icon button from the [Toolbar](#). The Clause Editor is also accessible from the Tools menu of the [Menu Bar](#). The Clause Editor Form window will appear.
2. Select the Clause Category and Title from their respective menus.
3. Verify that the desired clause has been located by viewing it in the Clause Text field.
4. Select the Use Clause button on the upper right of the Clause Editor Form window.
5. Repeat steps two through four for additional clauses.
6. Select the Close button when all necessary clauses have been added to the active form.

#### EDIT AN EXISTING CLAUSE

1. Select the Clause Editor Icon button from the [Toolbar](#). The Clause Editor is also accessible from the Tools menu of the [Menu Bar](#). The Clause Editor Form window will appear.
2. Select the Clause Category and Title from their respective menus.
3. Verify that the desired clause has been located by viewing it in the Clause Text field.
4. Select the Edit button on the right of the Clause Editor Form window.
5. Edit the clause as necessary.
6. Select the Save Clause button.

7. Repeat from step two for additional clauses.
8. Select the Close button when all necessary edits have been completed.

### DELETE A CLAUSE

1. Select the Clause Editor Icon button from the [Toolbar](#). The Clause Editor is also accessible from the Tools menu of the Menu Bar. The Clause Editor Form window will appear.
2. Select the Clause Category and Title from their respective menus.
3. Verify that the desired clause has been located by viewing it in the Clause Text field.
4. Select the Delete Clause button on the right of the Clause Editor Form window.
5. Repeat from step two for additional clauses.
6. Select the Close button when all necessary deletions have been completed.

### **KEYBOARD SHORTCUTS**

#### KEYBOARD SHORTCUTS

Most ZipForm<sup>®</sup> 5.0 functions or commands may be performed from the keyboard without the use of the mouse. This represents a convenience for some Users that are more adept at using a keyboard verses using a mouse or those Users who prefer to use the keyboard on notebook computers where the mouse pointer may be difficult to see or move. Many of the [Menu Bar](#) commands will offer the Keyboard Shortcut for that specific command. Example: F8 indicates the Function Key to open the [Clause Editor](#). Function Keys are usually the top row of keys on a keyboard and are numbered 1-12.

Combo keys:

Some commands require a combination of keys to be pressed at the same time. These combinations will be indicated by one or more plus (+) symbols or with one letter of the command underlined. Examples of combination keyboard commands for ZipForm<sup>®</sup> 5.0: Ctrl+S indicates the Save command may be given by holding down the Control key (Ctrl) and pressing the S key. Ctrl key commands may be issued at any time, providing the function is active (not grayed out).

File indicates the File menu will drop down when the Alternate key (Alt) is held down while pressing the F key. This type of command requires the same protocol as using a mouse in that the User cannot issue the Exit command (Alt+X) without accessing the File menu (Alt+F) first.

#### LIST OF KEYBOARD SHORTCUT KEYS

The function keys are listed below in three groups:

- Form Window Function Keys - which are explicit functions when a form is displayed
- Menu Bar Function Keys - which access the Menu Bar functions
- Global Function Keys - which are used throughout ZipForm<sup>®</sup>

Form Window Function Keys:

<u>Press</u>	<u>To</u>
F8.....	Activate the clause editor dialog box.
F7.....	Activate <b>Spellcheck</b> .
Ctrl+Z .....	Undo last function
Ctrl+X .....	Cuts selected text, stored in clipboard
Ctrl+C.....	Copies selected text, stored in clipboard
Ctrl+V .....	Pastes clipboard text to current field.
Ctrl+T .....	Inserts today's date into current field.
Ctrl+U.....	Changes all characters in the current field to uppercase.
Ctrl+L .....	Changes all characters in the current field to lowercase.
Alt+C .....	Changes first characters of each word in the current field to uppercase.
Alt+0.....	ZOOM image to 80 percent
Alt+1.....	ZOOM image to 100 percent
Alt+2.....	ZOOM image to 125 percent
Alt+3.....	ZOOM image to 150 percent
Alt+4.....	ZOOM image to 200 percent
Alt+W .....	ZOOM image to screen width with page margins

Alt+M..... ZOOM image to screen width without page margins  
Tab..... Go to next field  
Enter ..... Go to next field (when in a single line field), or to the next line of a multi-line field  
Shift+Tab..... Go to previous field  
Page Up ..... Pages up on the displayed form  
Page Down.. Pages down on the displayed form

#### Menu Bar Function Keys:

Press	To
Alt+F .....	Activates FILE from Menu Bar
Alt+E .....	Activates EDIT from Menu Bar
Alt+O .....	Activates OPTIONS from Menu Bar
Alt+T .....	Activates TOOLS from Menu Bar
Alt+S .....	Activates SECTIONS from Menu Bar
Alt+P .....	Activates PAGE from Menu Bar
Alt+Z .....	Activates ZOOM from Menu Bar
Alt+H .....	Activates HELP from Menu Bar

#### Global function keys:

Press	To
F1 .....	Display Help.
Ctrl+F6 .....	Display ZipForm® reset dialog box. Used for online Technical Support.
Alt+F4.....	Exit ZipForm®
Alt+Tab.....	Switches to other open programs

## PRODUCT SUPPORT

### PRODUCT SUPPORT INFORMATION

Product support is available only to registered ZipForm® Users between the hours of 8:00 a.m. and 8:00 p.m. eastern time Monday through Friday.

Have the serial number and access to the computer when calling Product Support. The serial number can be located by selecting About from the Help menu of the [Menu Bar](#) or on the ZipForm® Program CD. **For Demo Versions, the serial number is "DEMO".**

#### **Mailing Address:**

RE FormsNet, LLC  
18025 Fifteen Mile Road  
Clinton Twp., MI 48036

#### **Sales:**

Phone Number - (800) 383-9805  
Email - ZipForm@zipform.com  
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#### **Product Support:**

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#### **ZipForm® Internet Site:**

www.zipform.com

## GLOSSARY

### GLOSSARY OF TERMS

#### **A**

**Active Field** - The field in which the User is currently working. A field becomes active when the field is selected or Tabbed to from the previous field and is either highlighted or enlarged.

**Amortization Schedule** - An itemized list of loan payments covering the entire term of the loan.

**Association** - An organization of persons having a common interest.

#### **B**

**Background Color** - The color that appears where there is no text, fields or graphics.

**Boilerplate** - Areas of a form that cannot be edited by the User.

## **C**

**Calculated Field** - The numeric value produced from the calculation of other numeric fields.

**Calculator** - Tool for computing amortized monthly mortgage payments.

**Cancel Button** - Command button to instruct computer to ignore the information displayed in the dialog box or window in which the button appears.

**Capitalize** - Command feature to change the first alpha character of each word in an active field to an upper case letter.

**Category** - Classification or division of a clause, form or transaction.

**Check Box** - A geometrical square or circle that indicates the status of the correlating feature or command.

**Clause** - A statement or word group indicating a provision, condition or limitation.

**Clause Editor** - A tool for composing and managing form clauses.

**Clause Text Field** - The field of the Clause Editor window in which the text of the clause appears and is composed or edited.

**Close Button** - Command button to close the dialog box or window in which it appears.

**Cover Sheet** - The primary form of a transaction, which holds information common to many fields throughout the forms library.

**Cursor** - A flashing vertical bar representing the point of entry for characters being pasted or typed into a field.

## **D**

**Data Encryption** - Data that is encoded so that it can only be decoded by specific individuals.

**Default Printer** - The Default Printer is determined and configured by the Windows<sup>®</sup> Printer Control Panel. All printing will be directed to this printer unless the Print Setup is used. To change the Windows<sup>®</sup> Default Printer, close ZipForm<sup>®</sup> and select Control Panels from the Settings menu located on the Windows<sup>®</sup> Start menu. ZipForm<sup>®</sup> must be closed prior to changing the Default Printer for changes to take effect. WARNING: All Windows<sup>®</sup> software programs use the Default Printer. Changing the Default Printer will route all other programs to that printer.

**Delete Clause Button** - Command button to remove the clause that is active, or open in the Clause Editor.

**Dialog Box** - A warning or small window (usually with only one field) that appears to aid and instruct the User during a command process.

**Directory** - A hierarchical computer filing system. In Windows<sup>®</sup> a directory is usually referred to and appears like a manila file folder that contains files and perhaps additional folders.

## **E**

**Edit Clause Button** - Command button to activate the fields of the Clause Editor, allowing the clause, category and title to be edited.

## **F**

**Field** - The area or line of a form or window that allows a limited amount of data input.

**Floppy Disk** - A small, portable plastic disk coated in a magnetic substance used for storing computer data, readable by a computer with a floppy disk drive. The size of a floppy disk is usually 3.5".

**Floppy Drive** - A computer hardware device for writing and reading a floppy disk.

**Forms** - A standard document requiring specific information.

**Form Library** - A catalog or grouping of forms.

**Form Manager** - An on-screen window used for the organization of forms within a transaction. The Form Manager enables Users to add, remove, print and preview forms used in the active transaction.

**Form Update** - A operating program that automatically updates forms and form libraries for future use. Form Updates do not change any forms assigned to specific transactions or templates. Form Updates are posted on the ZipForm<sup>®</sup> website.

## **G**

## **H**

**Hard Drive** - A rigid magnetic disk within, or connected to a computer, used for the storage and management of computer programs and data.

**Highlight** - An active field or portion of text whose background and foreground has been altered to focus the User's attention to the point of interaction.

## **I**

**Icon** - A small picture or graphic, usually on a command button, representing a command or action that will take place when the graphic is selected by the mouse pointer.

**Internet** - An international system of computers and computer networks linked together for the purpose of data communication.

## **J**

**Jump Menu** - A pull-down menu appearing on the Toolbar allowing the User to move, or "jump" to a section or form that relates to the current active form.

## **K**

## L

**Label** - A title, command or description of an item or function.

**Legal Size** - Standard Legal Size paper is 8.5" X 14"

**Letter Size** - Standard Letter Size paper is 8.5" X 11"

**Link Select** - The mouse pointer becomes a hand with the index finger pointing when it is moved to links on the internet, or when the Strike Out is on and the pointer is moved to boilerplate text.

**Local Computer** - A specific computer in a network environment.

**Lower Case** - Small letters. Alpha characters that are not capitalized.

## M

**Master User** - The administrator of a specific ZipForm® installation.

**Menu** - A list from which the User may choose an operation to be performed.

**Menu Bar** - A narrow strip across the top of the computer screen or window, which has the names of available pull-down menus, such as "File", "Edit", "Window", etc.

**Mouse Pointer** - Arrow graphic indicating the point of interaction with, and controlled by the computer mouse.

**Multi-Lined Field** - The area or multiple lines of a form or window that allow a greater amount of data input.

## N

**Network Drive** - The hard drive of the computer acting as the network server.

**Network Server** - The central computer that ZipForm® has been installed and stores transaction files for a network of computers.

**Numeric Field** - A field that is restricted to numerical characters.

## O

**OK Button** - Command button to instruct computer to accept the information displayed in the dialog box or window in which the button appears.

**Options Button** - Command button to instruct computer to display the alternatives a User has for the specific category in which the button appears.

**Overtyping** - Each character in a line is replaced with characters being input.

## P

**Path** - The specification of a file or program in a hierarchical file system. The path is usually specified by listing each folder top-down, usually starting with the Drive, and separated by a slash "/" or back-slash "\". Example: The path for a game that has been downloaded from the Internet into My Briefcase would look like this: C:\WINDOWS\Desktop\My Briefcase\game.exe

**Preview** - A preliminary view of a specific item such as a form.

**Protected** - Guarded to limit access.

## Q

## R

**Read Only Field** - A field that is not directly accessible to the User. Information appearing in a Read Only Field has been imported from another source.

## S

**Save Clause Button** - Command button to instruct computer to accept and store the clause as it is.

**Scrolling** - Using the Scroll Bar to move the screen display vertically or horizontally to reveal portions of an open item too large to be viewed in its entirety.

**Scroll Bar** - A narrow strip appearing on the side and/or bottom of the window containing a slide whose position in the scroll bar represents the position of the visible part within the whole display. Arrow buttons are provided at the end(s) of the scroll bar to allow scrolling in either direction by selecting them with the mouse. Selecting the space on either side of the slide will cause the display to move the entire width or height of the display, much like the Page Up and Page Down keys. Dragging the slide (positioning the mouse pointer on the slide and holding down the left mouse button while moving the mouse) will allow the User to control the scrolling speed.

**Section** - A specific portion of a form.

**Select Text I-Bar** - The mouse pointer becomes I shaped when it is moved to text fields.

**Strike Out** - A horizontal line through the center of a letter, word or word group for the purpose of disqualification or omission. WARNING: Strike Outs are prohibited in some areas and may be disabled. RE FormsNet, LLC™ is not responsible for the illegal use of this or any other feature of this product.

**Subdirectory** - A directory (folder) that is inside, or subordinate to, another directory (folder). A subdirectory must be reached by going through all directories above it.

**Submenu** - A menu that is accessed from a menu. Example: The Zoom submenu is accessed from the Window menu. **Menu** - A list from a list which the User may choose an operation to be performed.

## T

**Template** - A specific transaction built for the purpose of repeated use.

**Title Bar** - A narrow strip appearing at the top of the window with the program and file names on the left and a set of display control buttons to the right.

**Toggle** - To move back and forth from one function to another. To turn a function off and on repeatedly.

**Transaction** - One or more forms elected to document an exchange or transfer agreement between parties.

**Transaction Category** - Transactions grouped by the nature or classification of the agreement.

**Transaction File** - A stored or saved transaction.

**Transaction Header** - A dialog box that allows the input of the most basic information pertaining to a transaction.

**Transaction Index** - A window displaying and allowing the management of saved transactions.

#### U

**Upper Case** - Alpha characters that are capitalized.

**Use Clause Button** - Command button to instruct computer to apply the active clause to the active form.

**User Manager** - A window controlling User access and properties.

#### V

**Virus** - A program that searches out other programs and "infects" them by embedding a copy of itself in them, so that they become invisibly to the User. When these programs are executed, the embedded virus is executed too, thus propagating the "infection" and disrupting normal computer operations.

#### W

**Web Site** - A specific place or address on the Internet.

#### X

**XML** - Extensible Markup Language is a universal programming format for structured documents and data on the Web.

#### Y

#### Z

**Zoom** - To reduce or increase the screen display.

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