

Downloading Your Transactions From Form Simplicity And Uploading Them To zipForm Plus

- First, log in to FormSimplicity, then click on “Active Transactions” or “Active” from the navigation (the process is the same for Archived transactions)

The screenshot shows the FormSimplicity website interface for a professional user. At the top left is the New Jersey Realtors logo. To the right is the FormSimplicity logo with the tagline "transactions made simple" and a "PROFESSIONAL" badge. A navigation menu includes links for HOME, LIBRARY, ACTIVE, ARCHIVED, CONTACTS, PACKAGES, TASKS, CLAUSES, MY FILES, FEEDBACK, and HELP. Below the navigation, a welcome message reads "Welcome, Quentin LOG OUT". The main content area features four buttons: "Start a Form" (with a folder icon), "Forms Package" (with a document icon), "Active Transactions" (with a folder icon), and "Archived Transactions" (with a folder icon). A green arrow points to the "Active Transactions" button. Below this is a promotional banner for "NOW ONLY \$59 /yr Unlimited eSign and Document Storage" with a "sign Anywhere Anytime" logo and an "Upgrade to the Ultimate Edition" link. The footer contains a navigation bar with links for Browser Checklist, Live Support, Upgrade, Feedback, Terms of Service, Privacy Policy, Copyright Policy, and Contact Us, along with social media icons for Facebook and Twitter, and the REALTOR logo.

- Next, open the transaction that you want to export.

The screenshot displays the user interface of the FormSimplicity application. At the top, the New Jersey Realtors logo is on the left, and the FormSimplicity logo with the tagline "transactions made simple" is on the right. A navigation menu includes links for HOME, LIBRARY, ACTIVE, ARCHIVED, CONTACTS, PACKAGES, TASKS, CLAUSES, MY FILES, FEEDBACK, and HELP. The user is logged in as "Welcome, Quentin" with a "LOG OUT" link. A "PLAY ACTIVE TRANSACTIONS VIDEO" button is visible. The breadcrumb trail shows "HOME : TRANSACTIONS : FORMS : Active Transactions". The page indicates "View per page: 10 | 25 | 50" and "Active Transactions: 82", with the current page being "Page 1 of 9".

The main content area is titled "ACTIVE TRANSACTIONS" and features a search bar with "FIND A TRANSACTION" and "FIND" buttons, and a "CREATE NEW TRANSACTION" button. Below this is a table with the following columns: TRANSACTION NAME, ADDRESS, DATE CREATED, LAST UPDATED, and EDIT.

TRANSACTION NAME	ADDRESS	DATE CREATED	LAST UPDATED	EDIT
New Transaction		11.18.15	11.18.15	EDIT
New Transaction		11.12.15	11.12.15	EDIT
New Transaction		07.01.15	07.01.15	EDIT
New Transaction		05.28.15	05.28.15	EDIT
New Transaction		05.05.15	05.05.15	EDIT
New Transaction		04.23.15	04.23.15	EDIT
Test		03.30.15	03.30.15	EDIT
New Transaction		02.10.15	03.30.15	EDIT

A green arrow points to the first row of the table, specifically to the "TRANSACTION NAME" column.

- To export the entire transaction, click on the topmost checkbox under “Forms” and under “Files” to select all the items
- Then, go to the “SELECT COMMAND” dropdown menu, and select “Download” to download the transaction.

ADDRESS:
 EMAIL: transaction+ntzgeauqgo@formsimplicity.com TOTAL FILE SIZE USED: .36 mb ? [UPGRADE](#) [DELETE TRANSACTION](#)

New Transaction Content History Broker Review Tasks Sharing & Negotiating Email History

FORMS ? CHOOSE FORMS BELOW and **SELECT COMMAND** ?

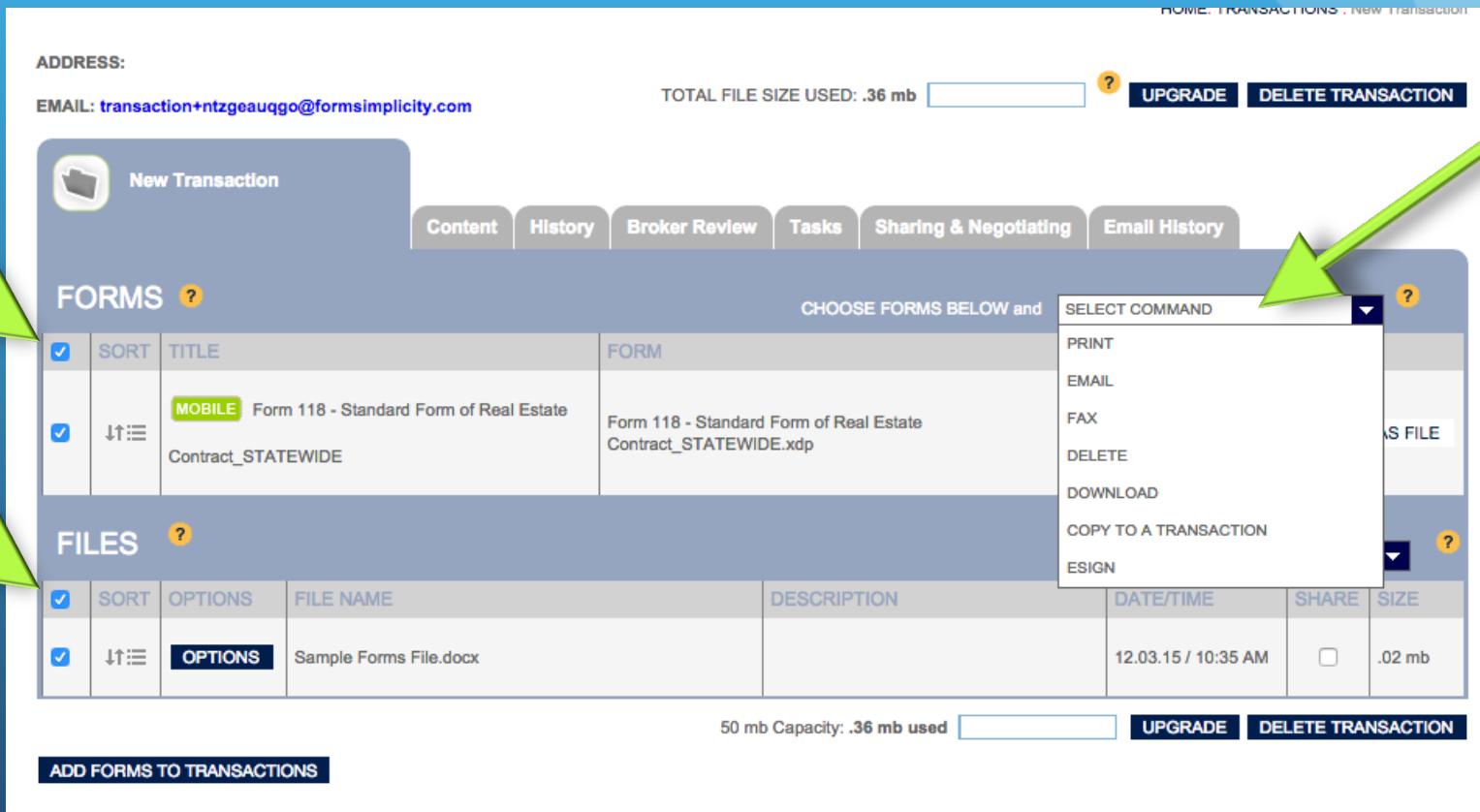
<input checked="" type="checkbox"/>	SORT	TITLE	FORM
<input checked="" type="checkbox"/>	↓↑☰	MOBILE Form 118 - Standard Form of Real Estate	Form 118 - Standard Form of Real Estate
		Contract_STATEWIDE	Contract_STATEWIDE.xdp

FILES ? S FILE ?

<input checked="" type="checkbox"/>	SORT	OPTIONS	FILE NAME	DESCRIPTION	DATE/TIME	SHARE	SIZE
<input checked="" type="checkbox"/>	↓↑☰	OPTIONS	Sample Forms File.docx		12.03.15 / 10:35 AM	<input type="checkbox"/>	.02 mb

50 mb Capacity: .36 mb used [UPGRADE](#) [DELETE TRANSACTION](#)

[ADD FORMS TO TRANSACTIONS](#)



DONE!

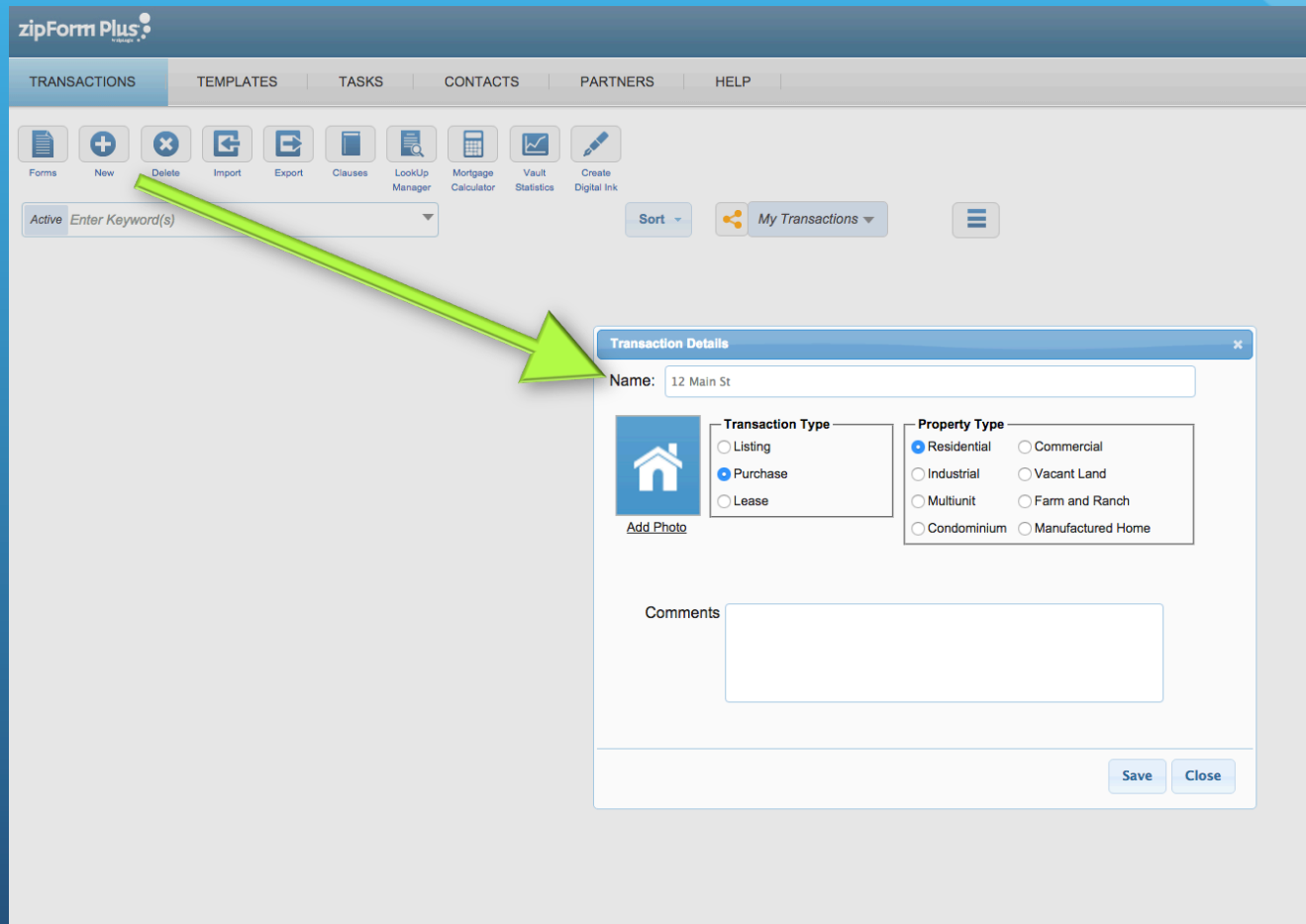
- That's it! The forms are downloaded to your computer in a .zip file with all the forms/files from that transaction.
- Repeat this quick process for all transactions you want to keep for your records.
- Next, we'll look at uploading these files to zipForm for storage.

NEXT:

UPLOADING YOUR TRANSACTIONS TO ZIPFORM PLUS

UPLOADING YOUR TRANSACTIONS

- First, make sure you have your transaction downloaded from Form Simplicity. Then, log into zipForm Plus and create a new transaction to hold your files. You can name it the same as you named it in Form Simplicity.



The screenshot displays the zipForm Plus web application interface. The top navigation bar includes tabs for TRANSACTIONS, TEMPLATES, TASKS, CONTACTS, PARTNERS, and HELP. Below the navigation bar is a toolbar with icons for Forms, New, Delete, Import, Export, Clauses, LookUp Manager, Mortgage Calculator, Vault Statistics, and Create Digital Link. A search bar labeled 'Active' with the placeholder text 'Enter Keyword(s)' is visible. A green arrow points from the 'New' button in the toolbar to the 'Transaction Details' dialog box. The dialog box has a title bar with a close button (X) and contains the following fields and options:

- Name:** 12 Main St
- Transaction Type:** Radio buttons for Listing, Purchase (selected), and Lease.
- Property Type:** Radio buttons for Residential (selected), Industrial, Multiunit, Condominium, Commercial, Vacant Land, Farm and Ranch, and Manufactured Home.
- Comments:** A text input field.
- Buttons:** Save and Close.

UPLOADING YOUR TRANSACTIONS

- Next, from inside your transaction, click the down-arrow/caret button located next to the transaction name in the upper left.
- Then, click on "Import from archive".

The screenshot displays the zipForm Plus web application interface. At the top, the navigation bar includes 'TRANSACTIONS', 'TEMPLATES', 'TASKS', 'CONTACTS', 'PARTNERS', and 'HELP'. Below this, a search bar contains the text '12 Main St' and a dropdown arrow. A secondary navigation bar shows tabs for 'Documents', 'Parties', 'Property', 'Checklist', 'Services', and 'History'. A search input field on the right is labeled 'Enter Keyword(s)'. The main content area is divided into two sections: 'Transaction Details' and 'Menu Options'. The 'Transaction Details' section lists information for '12 Main St', including 'Modified Just now', 'Created Just now', 'Seller', 'Buyer', 'Address No Address', and 'Type Purchase, Residential'. The 'Menu Options' section is a dropdown menu with two columns of actions. A green arrow points to the 'Import from archive' option in the second column. Other options include 'Transaction Information', 'View/Edit Details', 'Apply template', 'Save as template', 'Copy', 'Send to recipients', 'Print', 'Save as PDF', 'Sign', 'Collaborate', 'Add document', 'Add folder', 'Remove forms or documents', 'Email to transaction', 'Fax cover sheet', 'Export to archive', 'Lock', 'Partners', 'Send to Other System', 'Manage in relay', 'Show form versions', 'Delete transaction', and 'Activate intellicopy'. To the right of the menu are icons for 'e-Sign', 'Collaborate', and 'Copy PDF', along with 'Sort', 'Organize', and a hamburger menu icon.

zipForm Plus

TRANSACTIONS | TEMPLATES | TASKS | CONTACTS | PARTNERS | HELP

12 Main St

Documents | Parties | Property | Checklist | Services | History

Enter Keyword(s)

Transaction Details

12 Main St

Modified Just now

Created Just now

Seller

Buyer

Address No Address

Type Purchase, Residential

Menu Options

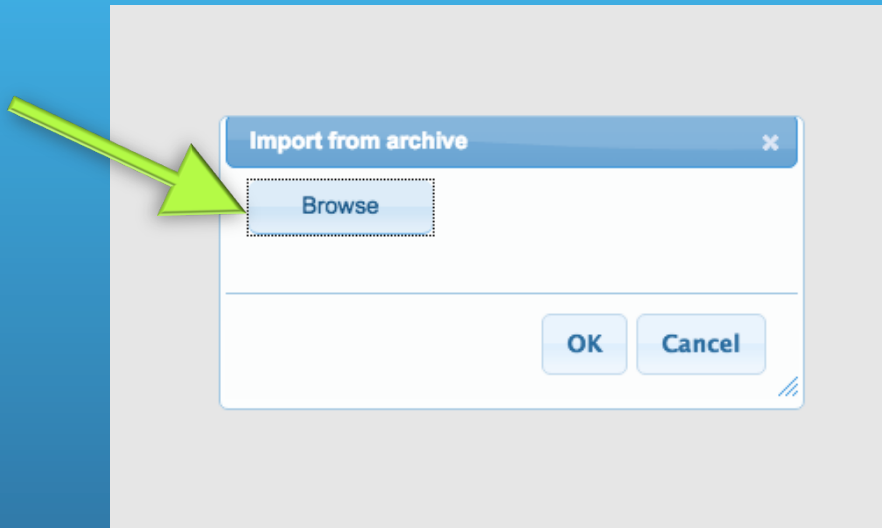
- Transaction Information
- View/Edit Details
- Apply template
- Save as template
- Copy
- Send to recipients
- Print
- Save as PDF
- Sign
- Collaborate
- Add document
- Add folder
- Remove forms or documents
- Email to transaction
- Fax cover sheet
- Import from archive
- Export to archive
- Lock
- Partners
- Send to Other System
- Manage in relay
- Show form versions
- Delete transaction
- Activate intellicopy

e-Sign Collaborate Copy PDF

Sort Organize

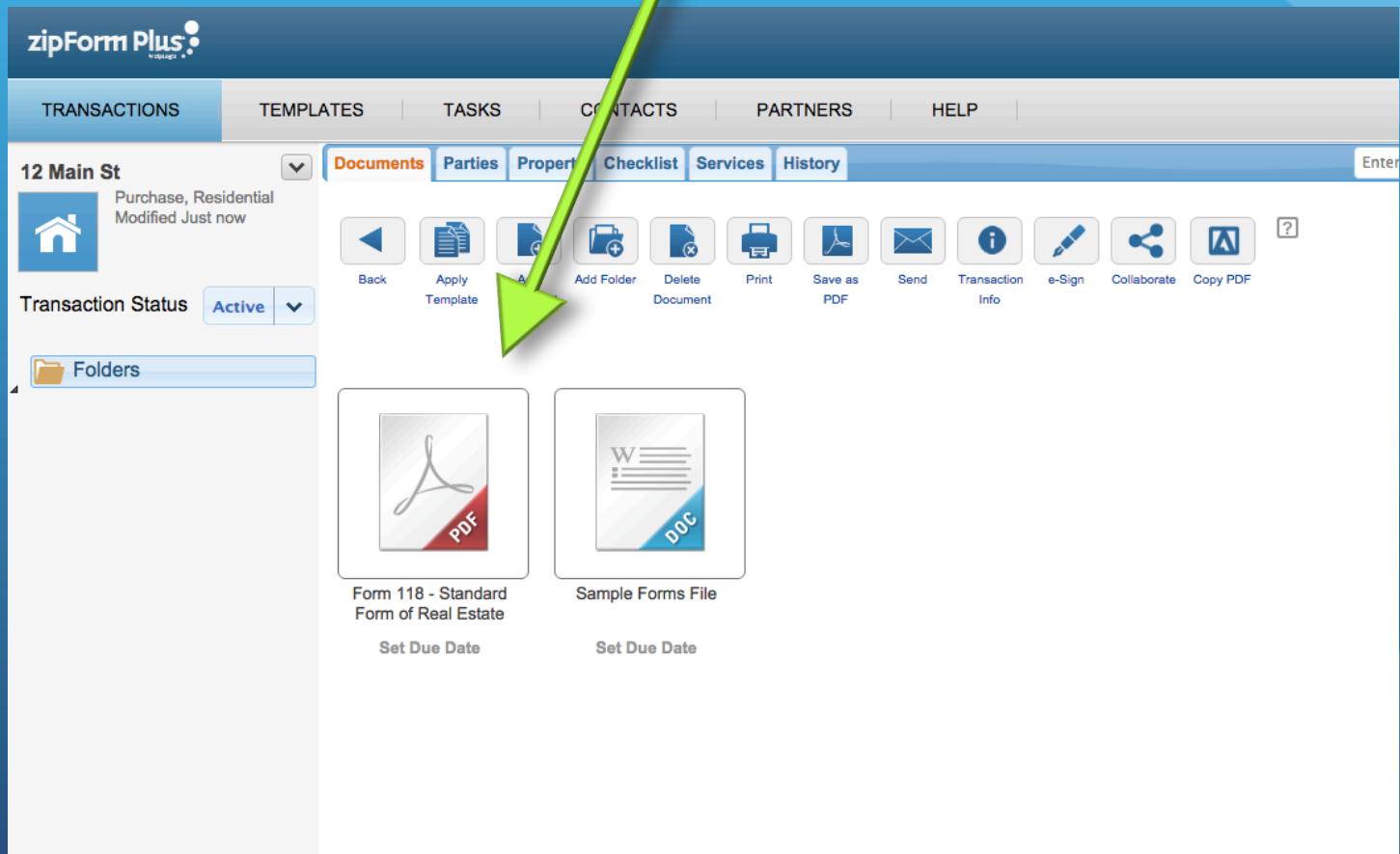
UPLOADING YOUR TRANSACTIONS

- Next, click "Browse" and find the .zip file that was downloaded from Form Simplicity.
- Select it and then click "OK"



UPLOADING YOUR TRANSACTIONS

- Done! Your files should be automatically unzipped and placed into the transaction.
- Repeat this for as many transactions as you want to bring over from Form Simplicity to zip Form Plus.



The screenshot displays the zipForm Plus web application interface. At the top, the logo 'zipForm Plus' is visible. Below it, a navigation bar includes 'TRANSACTIONS', 'TEMPLATES', 'TASKS', 'CONTACTS', 'PARTNERS', and 'HELP'. The 'TRANSACTIONS' tab is selected, and the 'Documents' sub-tab is active. The main content area shows a transaction for '12 Main St' with a status of 'Active'. A toolbar contains various icons for document management, including 'Back', 'Apply Template', 'Add Folder', 'Delete Document', 'Print', 'Save as PDF', 'Send', 'Transaction Info', 'e-Sign', 'Collaborate', and 'Copy PDF'. A green arrow points to the 'Add Folder' icon. Below the toolbar, two document thumbnails are shown: 'Form 118 - Standard Form of Real Estate' (PDF) and 'Sample Forms File' (DOC), both with a 'Set Due Date' button below them.