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)

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

- 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.
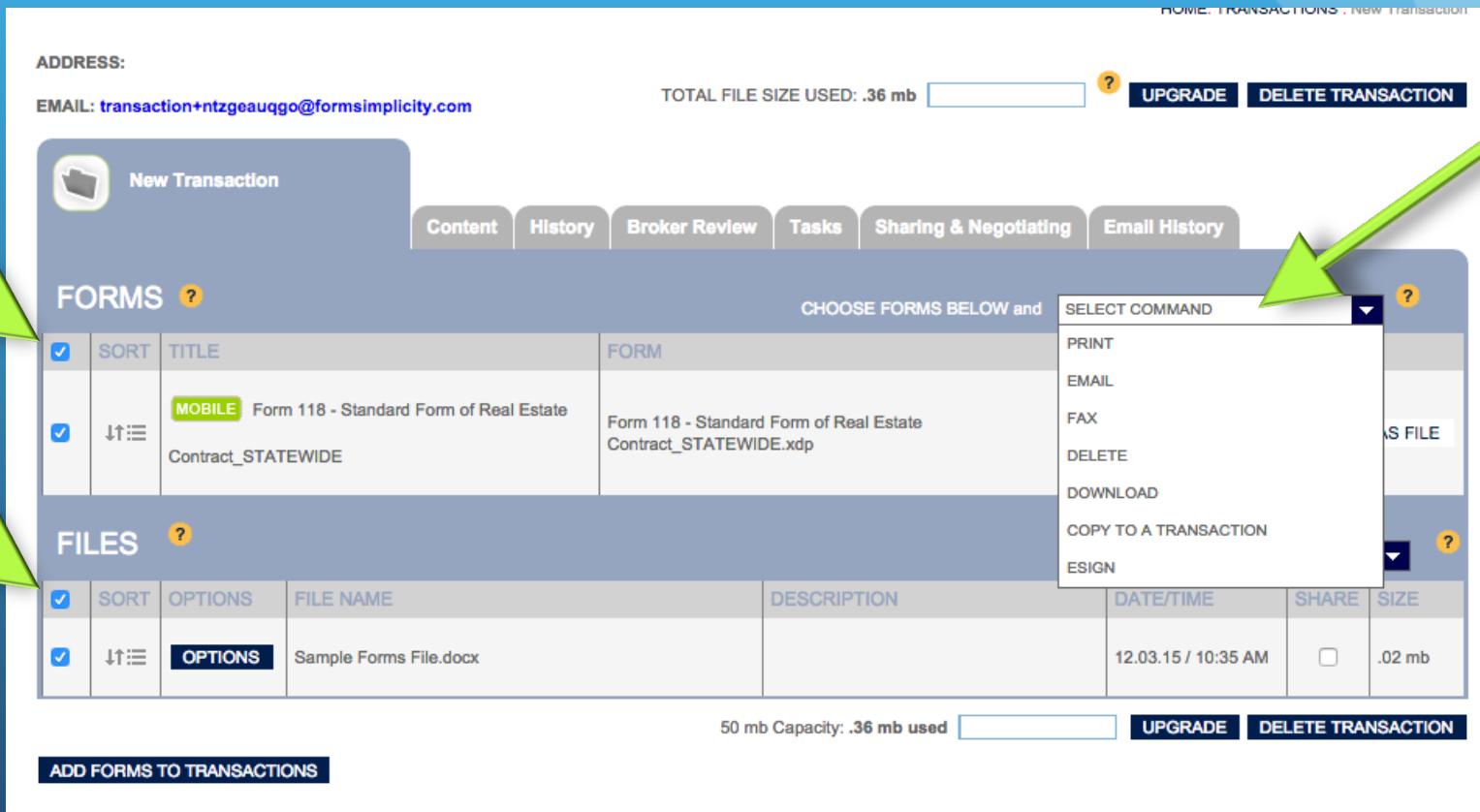
DONE!

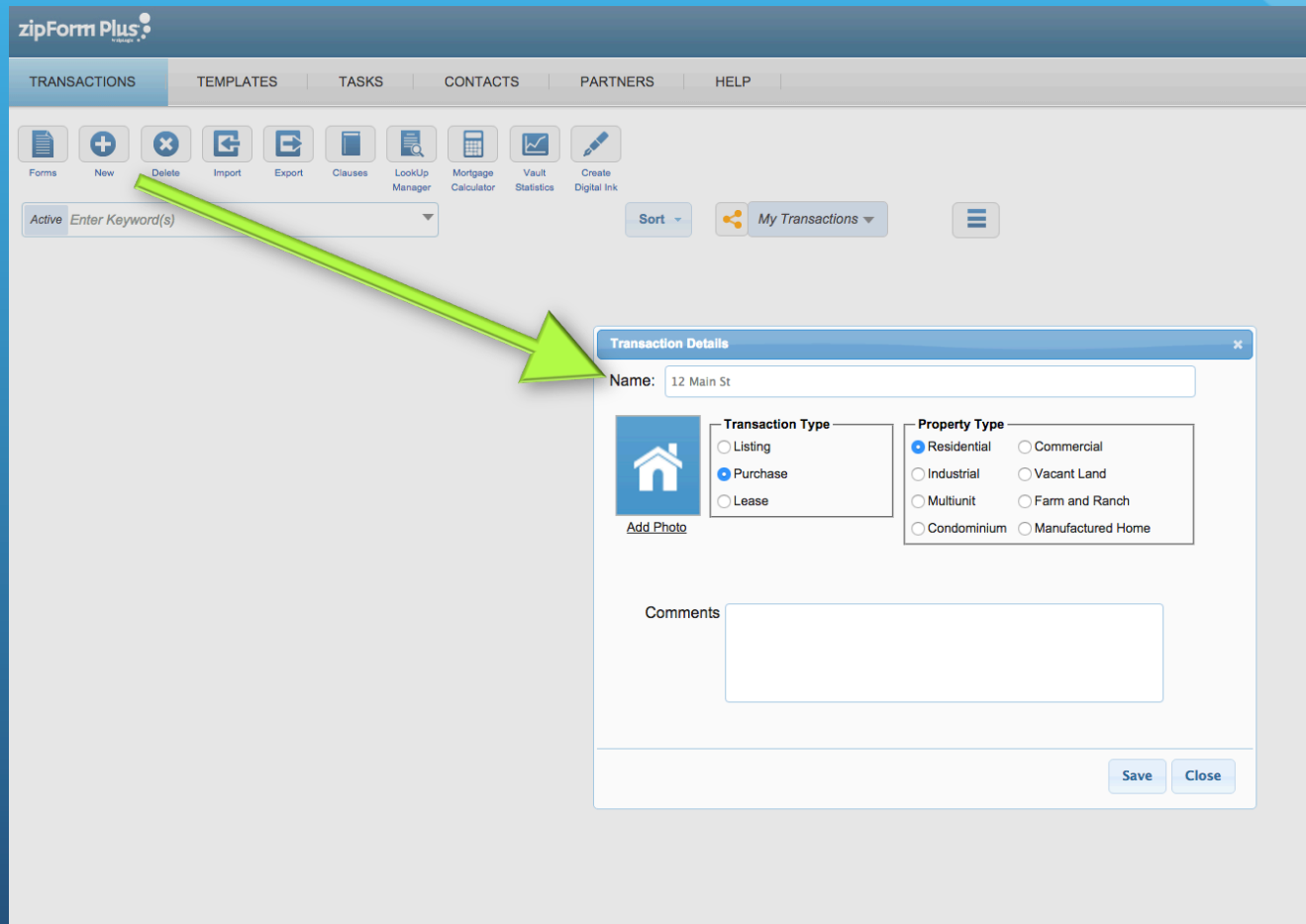- That's it! The forms are downloaded to your computer in a .zip file with all the forms/files from that transaction.
- Repeat this quick process for all transactions you want to keep for your records.
- Next, we'll look at uploading these files to zipForm for storage.

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.

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".

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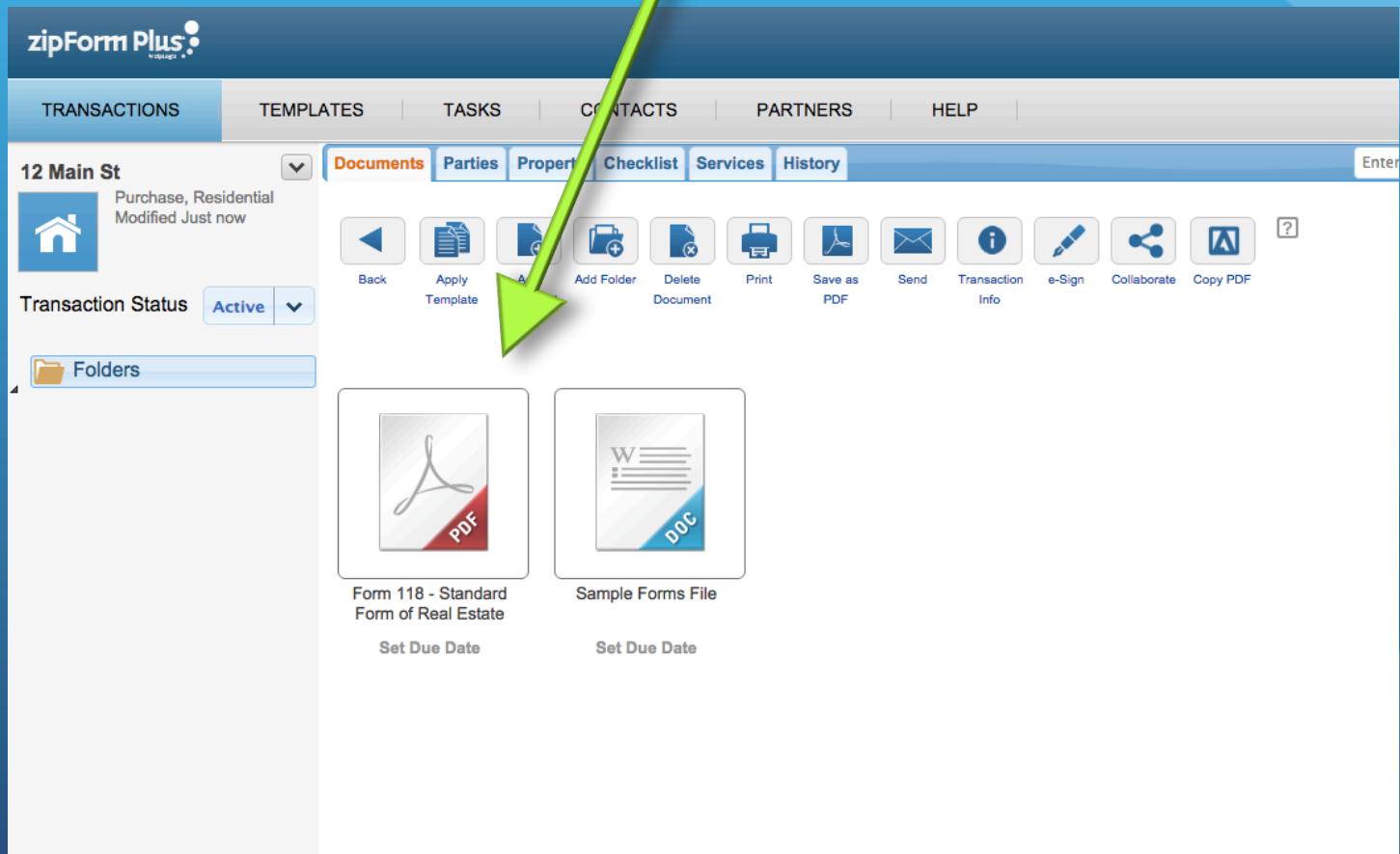
- Next, click "Browse" and find the .zip file that was downloaded from Form Simplicity.
- Select it and then click "OK"
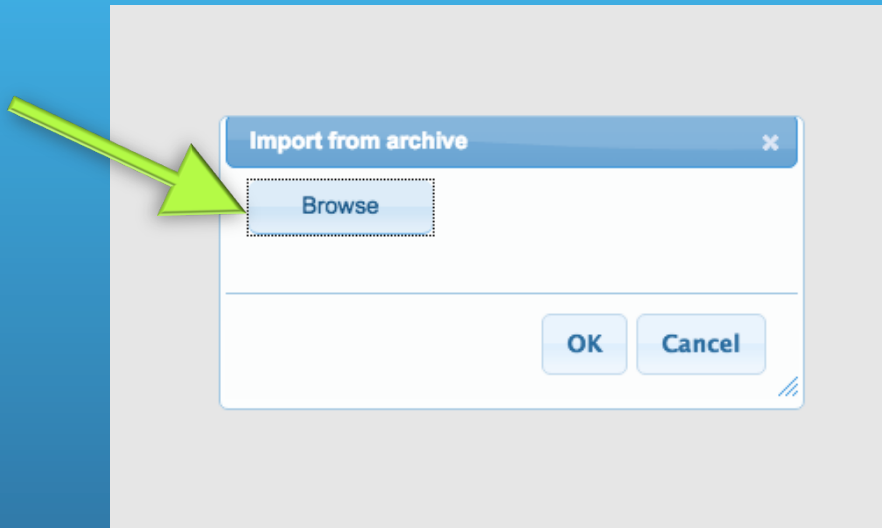
Uploading Your Transactions

- 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.