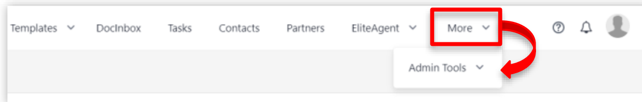
zipForm® Plus Broker Edition: Admin Tools Guide

zipForm® Plus Broker Edition offers many powerful tools to allow Administrators to manage their Brokerage accounts. Administrative features are available through the Admin Tools menu in the top navigation bar of your zipForm® Plus account.

Access Admin Tools Menu

1. Click **More** in the top navigation menu, then click **Admin Tools**.

NOTE: Larger screens may display Admin Tools in the top navigation bar.

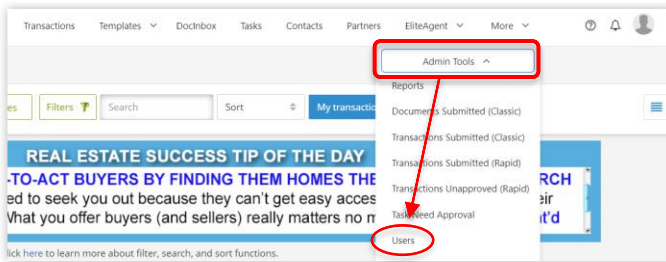


Users List

The **Users** list is comprised of zipForm® Plus users who have been assigned various roles within your brokerage account.

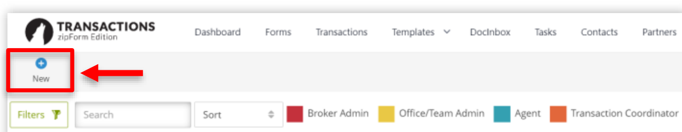
Access Users

1. On the **Admin Tools** menu, select **Users** to view the users in your brokerage account.

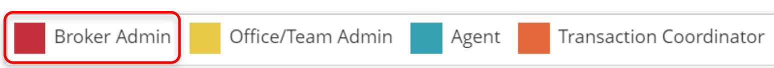


New User

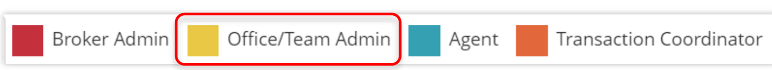
1. Click  in the top toolbar to create a new user. Enter data in the required fields on each screen and click SAVE on the last screen.



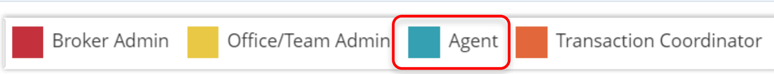
User Roles



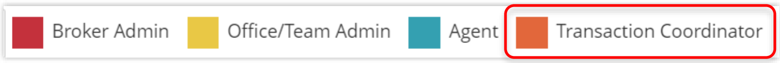
1. **Broker Admin:**
   - Access all agent accounts, transactions, offices (if any), forms, transaction reports, and templates for the entire Brokerage.
   - This is a member profile and an NRDS number will be required to log in.
   - Non-member users can be granted this access provided non-member products and libraries have been assigned to such users.



2. **Office/Team Admin:** *(also known as Location Administrator)*
   - Manage all files and user accounts at specific office location(s).
   - **Office Admins** can see and edit the users of the office assigned to them.
   - This is a member profile and an NRDS number will be required to log in.
   - Non-member users can be granted this access provided non-member products and libraries have been assigned to such users.



3. **Agent:**
   - An individual user who can create transactions and manage their personal files.
   - **Office Admins** can see agent transactions and templates but are not able to view the agent's contacts.
   - This is a member profile and an NRDS number will be required to log in.



4. Transaction Coordinator:

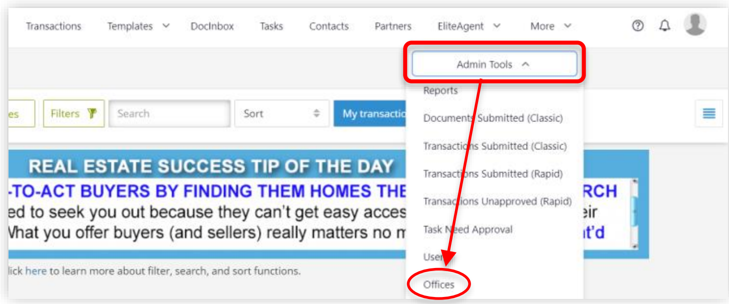
- Transaction Coordinators work on behalf of agents.
- Their profile settings grant permissions to edit existing transactions or create new transactions for an agent, or agents, at one or multiple offices.
- This is a non-member, non-licensed user profile and an NRDS number *will not* be required to login to this profile.

Offices List

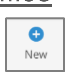
The **Offices** list allows Broker Admins to view and add offices to their zipForm® Plus account. Permissions can be assigned for each office when creating a new office. Office locations and statistics are viewable on the **Dashboard** screen and in the **Reports** menu. Brokers can run pertinent reports for any location.

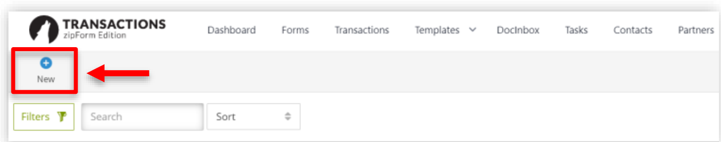
Access Offices

1. On the **Admin Tools** menu, select **Offices** to view the offices in your brokerage account.



New Office

1. Click  in the top toolbar to create a new office. Enter data in the required fields on each screen and click SAVE on the last screen.

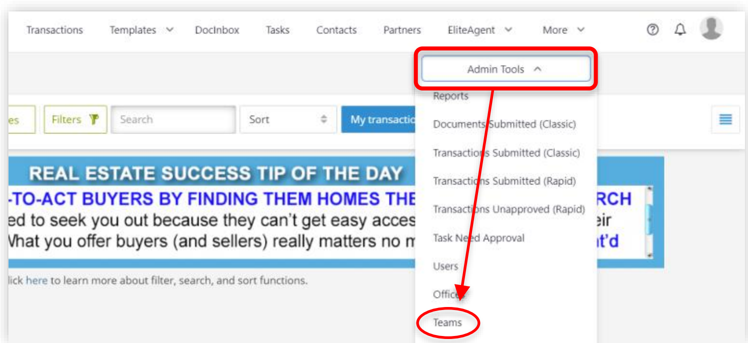


Teams List

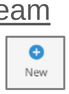
The **Teams** list houses the teams created in your brokerage account which provide agents collaboration ability. Users added to a team can work together more efficiently to close transactions. Users can also be assigned to multiple teams for a broader collaborative workflow.

Access Teams

1. On the **Admin Tools** menu, select **Teams** to view the teams in your brokerage account.



New Team

1. Click  in the top toolbar to create a new team. Enter data in the required fields on each screen and click SAVE on the last screen.