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Secure Document Sharing, Chat, and Screen Share

zipCommunity™ is a collaborative online platform that allows agents to work with clients and other agents on transactions in their zipForm® account. Collaborate live with video, audio, text chat, or screen sharing. Screen sharing is available in Chrome and requires the zipCommunity™ Screen Share Extension to be installed.

Share documents from your zipForm® transaction (Agent)

1. Inside your zipForm transaction, click the **Parties** tab in the gray navigation bar at the top.
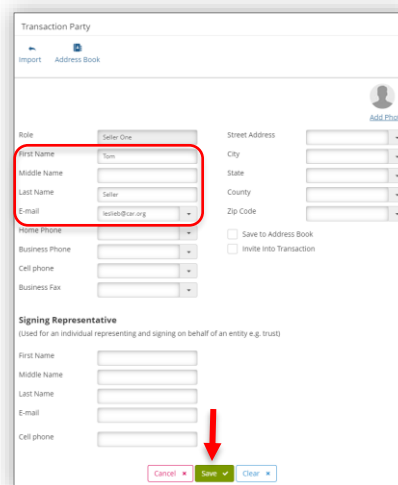
2. Click the **Role** of the person in the left navigation menu who you'd like to share documents with.
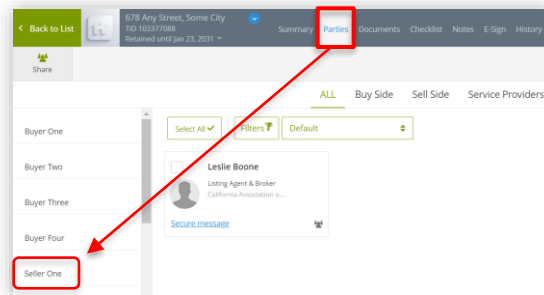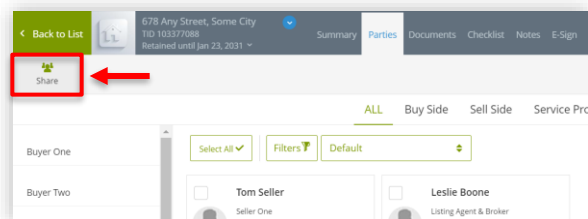

3. Type the party's **First Name**, **Last Name**, and **E-mail** address.

NOTE: Be sure to enter the email address here as you will not have an opportunity to add or edit the email address during the Share process.
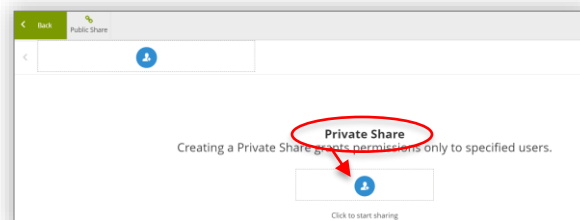
4. Click **Save ✓** at the bottom of the window.

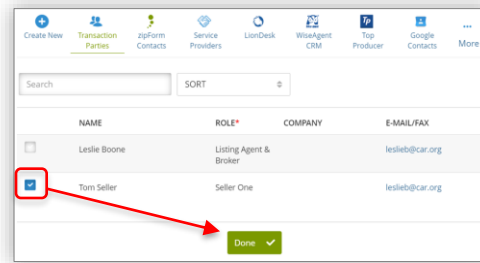**5.** Click **Share** in the top toolbar.

6. Click 🔵 under **Private Share** to get started.

7. Check the box to the left of the party you would like to share with.

8. Click **Done ✓** to continue.

**9.** Assign the **User Permissions** for your recipient:

- **Can edit forms** = turn this ON if you'd like your recipient to add data to or edit forms *(setting is Off by default)*
- **Can upload documents** = *(optional)* turn this ON if you'd like your recipient to upload documents into your zipForm transaction *(setting is Off by default)*
- **Can view history** = *(optional)* turn this ON if you'd like your recipient to view the History log of your interactions with them *(setting is Off by default)*
- **Stop sharing date** = leave this ON *(setting is On by default)*
- **Stop sharing on** = this date is pre-set for 30 days from today. To select a different date, click on the date to open the calendar *(setting is On by default)*

10. Click **Next** to continue.
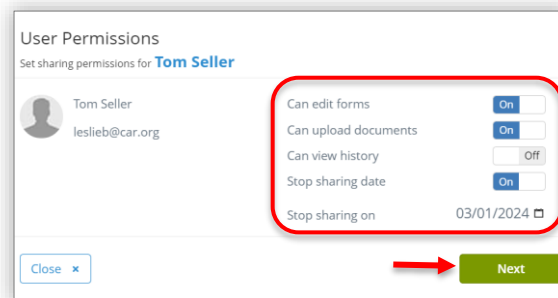
11. Check the box to the left of each document you'd like to share with your recipient.
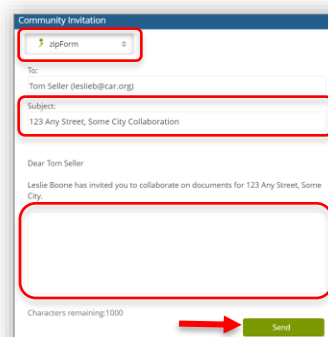
12. Click **Save & Send** to continue.
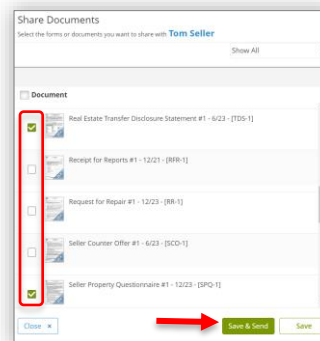
13. Complete the following:

- **Email Account** = select zipForm from the dropdown menu
- **Subject** = *(optional)* edit the subject line of the email
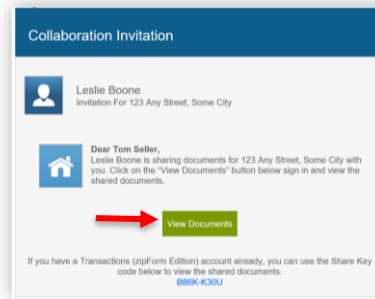- **Message** = *(optional)* type a message to your recipient

14. Click **Send** to send the collaboration invitation to your recipient.

zipCommunity™: Help At-a-Glance

zipCommunity™ Recipient Experience

The recipient will receive a **Collaboration Invitation** via email inviting them to view the documents.

1. Click View Documents to get started.

New User Login

New users will need to create an account.

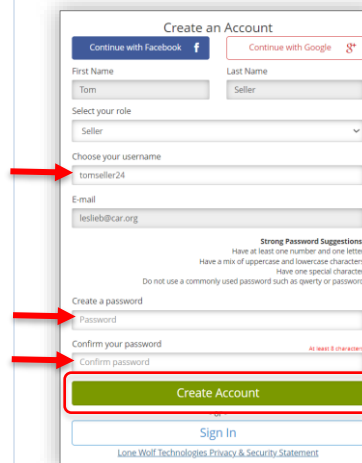**1.** On the zipCommunity™ page, click Create Account .

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2. Choose your username = the system creates a username with the recipient's first and last name and a number. The recipient can edit or change the username, if desired.

3. Create a password and **Confirm your password** = the recipient will type a password then type it again to confirm.

4. Click Create Account .

Returning User Login

Returning users will enter the login credentials they previously created.

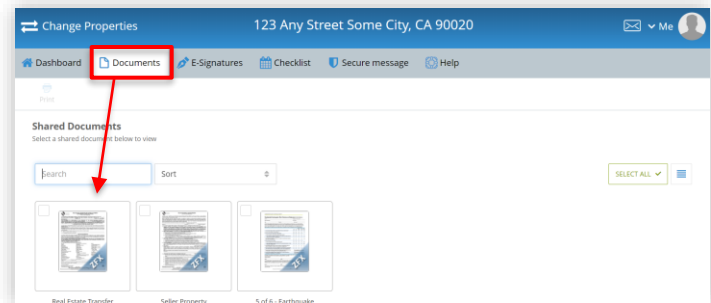**1.** Type the username and password for your account.

2. Click Sign In .

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View Documents

1. On the landing page, click **Documents** in the top navigation bar.
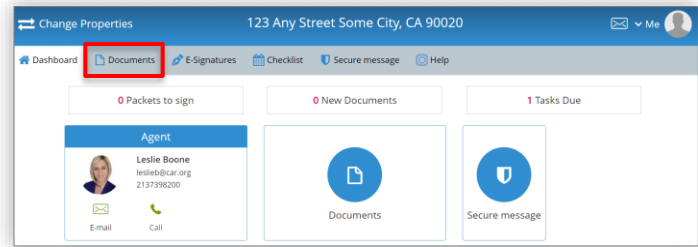
**2.** Click on a document to open it.

NOTE: If your username displays in the Search field, please remove it to view the documents shared with you.

The fields displayed in blue are fillable. The fields displayed in dark purple are not fillable.

3. Check the boxes and type your answers in the spaces provided.

NOTE: You can type as much information as you like in the text fields, and the data will carry over to a Text Overflow Addendum.
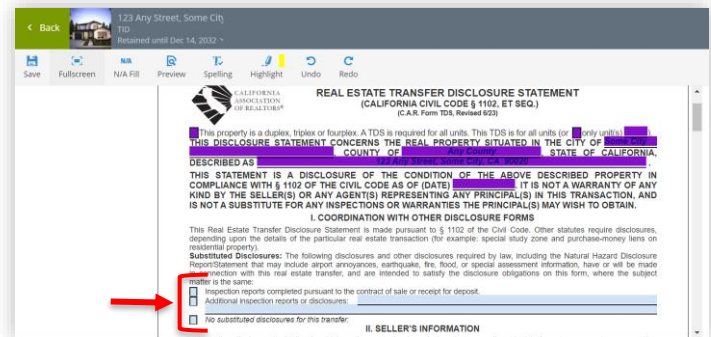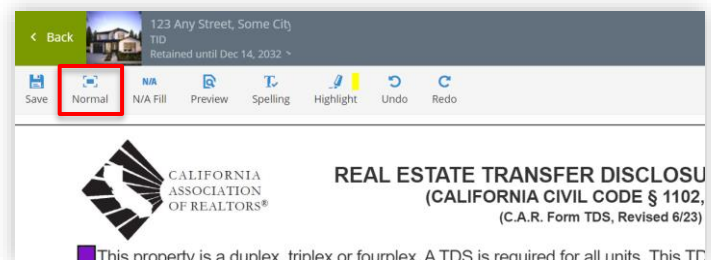
View Document Larger

1. Click **Fullscreen** in the top toolbar to view the document larger on your screen.
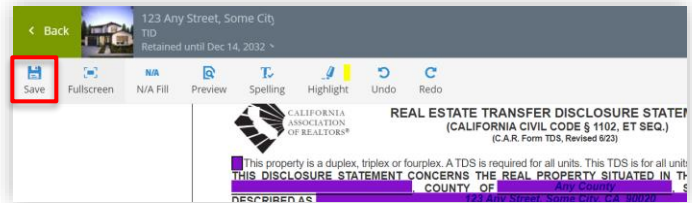
2. Click **Normal** in the top toolbar to view the document at its normal size.

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Save Your Work

1. Click **Save** in the top toolbar to save your work.

NOTE: It is recommended to click Save periodically while filling out a document.

Preview Answers

If your typed answers exceed the number of lines displayed on the form, they will carry over to a Text Overflow Addendum.

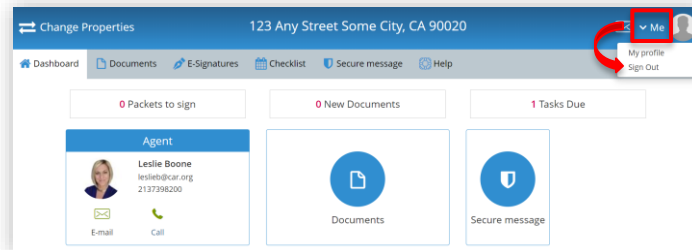**1.** Click **Preview** in the top toolbar to view your answers on the Text Overflow Addendum.

Exit Document

1. Click the green **Back** button at the top left to exit the document and return to the Documents screen.

Log Out of zipCommunity

1. Click the word **Me** at the top right and select **Sign Out** from the menu.

Preview Completed Documents (Agent)

After the recipient completes the form(s), the Agent can view their answers inside their zipForm transaction.

1. Open your zipForm transaction and click the **Documents** tab in the gray navigation bar at the top.

2. Click to open a form that was shared with the recipient.

NOTE: If you are prompted to choose the Classic Editor or the New Form Editor, select the New Form Editor.
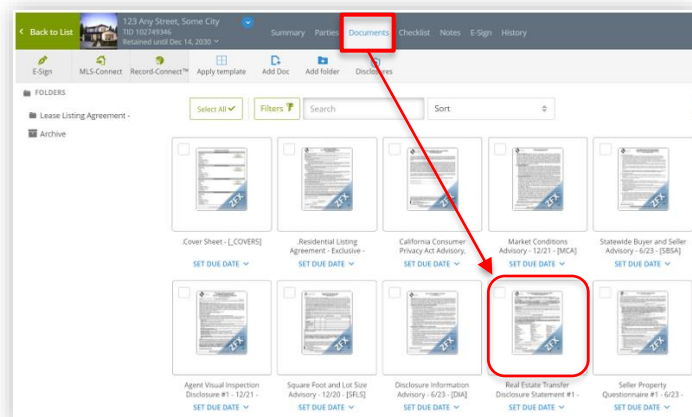
3. *(optional)* If you'd like to view multiple documents that the recipient completed, then add the remaining documents to the **Workspace** from the **Grab From Transaction** section by clicking the plus sign to the right of the document name.

4. Check the box(es) next to the form(s) in the Workspace, then click the **Print** icon.

5. Select **Print** from the menu.
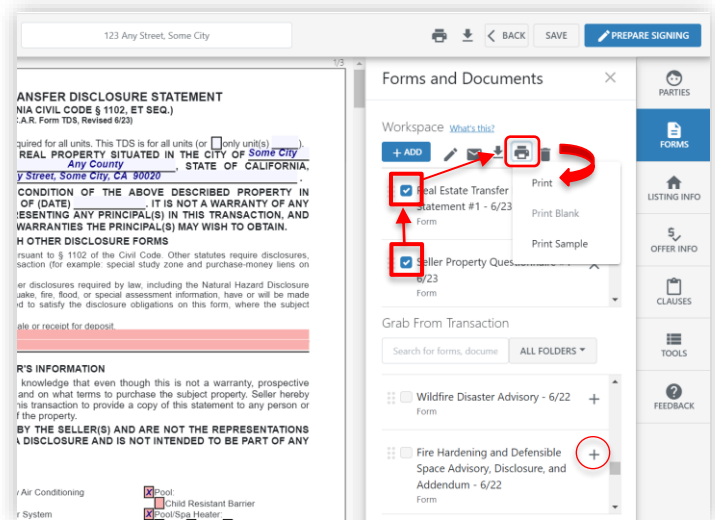
The document will open in your browser in PDF format.

6. *(optional)* If you'd like to save the document, do one of the following steps:

- Click **Download** in the top right corner to download the document to your computer.
- Click **Print** in the top right corner to save as PDF or send the document to your printer.
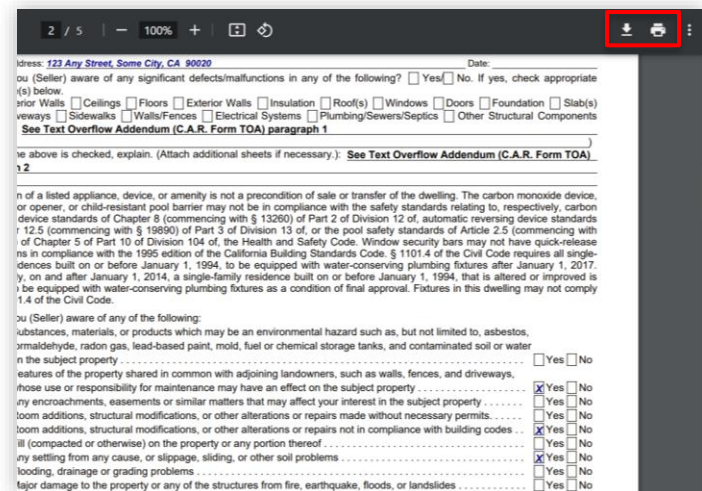
7. When you are done viewing the document, click the "X" to close the browser tab and return to your transaction.