



With the newest update to the zipForm + SkySlope integration, things are getting bigger and better! Here are some frequently asked questions about the newest update to the integration.

What is this pop up when I sign in?

After the newest update to zipForm + SkySlope integration, you will see this pop-up when logging into your SkySlope account:

zipForm<sup>®</sup>  
by zipLogix

Get started by entering your zipForm credentials!

zipForm Username:

zipForm Password:

Not now Save

We want to make the integration as easy as possible. All you need to do is enter your zipForm username and password to get started. Don't want to integrate? After clicking "Not Now" five times, the notification will no longer appear in your account. If you've clicked "Not Now" five times, and the notification is gone, you can still integrate your account a few different ways:

1. Click on your name in the upper right corner > My Account > Integrations > Click on Enable > Enter zipForm username and password > Click Save
2. Go to Working Docs > zipForm tab > "Click Here to get started!" > Click on Enable > Enter zipForm username and password > Click Save
3. Create Listing or Create Transaction > Enter property address > "Click Here to get started!" > Click on Enable > Enter zipForm username and password > Click Save (as pictured below)

Note: If your account is already fully integrated with zipForm, you will not see this pop-up.

Why am I getting an error when I enter in my username and password?

If you've entered your username and password into the zipForm Integration tab and you're getting an error message that reads "Could not update credentials", that means the username and/or password that you're entering are not the credentials we need to complete the integration. Many real estate agents access zipForm through their MLS Board Membership or Association of Realtors. While your credentials for those websites will allow you to access zipForm itself, they will not work for the integration with SkySlope. Since our integration is with zipForm directly, only your zipForm username and password will allow you to complete the integration.

To retrieve your zipForm username: Log into zipForm whichever way you typically do (through your MLS or through your Association of Realtors website) > Click on your name in upper right corner > Click on View Profile > Find username listed on My Information page

To reset your zipForm password: Go to [www.zipformplus.com](http://www.zipformplus.com) > Click on Forgot Password > Type the username associated with your account > Click on Send and you will be emailed a link that will allow you to reset the password for your zipForm account  
Once you've retrieved/confirmed your zipForm username and password, you can re-enter your credentials into the zipForm Integration page in SkySlope. If the credentials are correct, you will see a green "Success!" message in the upper right corner.

## Where can I find my zipForm Transactions within SkySlope?

Your zipForm documents can be found in the Working Docs section of SkySlope. From the home page, click on the icon for Working Docs. Once in Working Docs, click on the tab labeled zipForm. In the zipForm tab, you will see a list of your Transactions on the left side of the page. Click on the name of the Transaction to open the list of documents for that Transaction.

## How are the transactions ordered in the zipForm tab?

They are ordered by created date. The most recent transactions created will be found at the top of the list.

## What is this "zipForm Transaction" button under Working Documents?

With the newest release for the zipForm + SkySlope integration, we're trying to make things as easy as possible. Now, you can create a new zipForm Transaction right from within SkySlope. Within the zipForm section of Working Docs, there is a new, green button that says "+zipForm Transaction"; clicking on that will allow you to create a zipForm Transaction. After clicking that button, you will be prompted to enter in the required information for the Transaction (such as the name of the transaction, the property address, seller/buyer names, etc). Fill out the required information, and then click on Create.

The screenshot shows a web form titled "Create Transaction" with the zipForm logo in the top right. A green button labeled "+ zipForm\* transaction" is at the top, with a blue arrow pointing down to the form. The form is organized into three main sections:

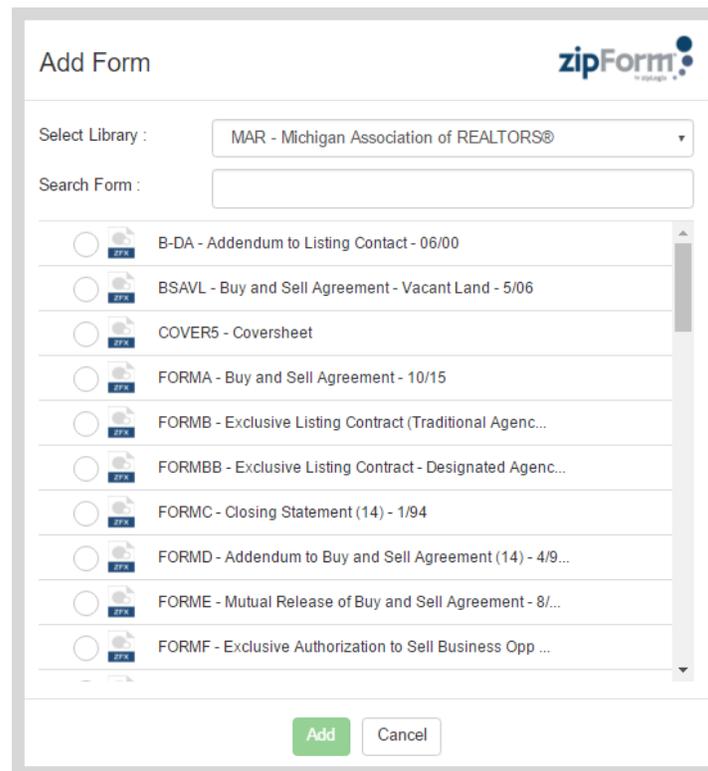
- Transaction Details:** Includes a "Required\*" label and fields for "Meyers - Maple St", "1234 Maple St", "West Sacramento", "CA", and "95691".
- Offer Details:** Includes fields for "\$ 530,000", "\$ 7,000", "11/01/2016", "12/08/2016", "Title Company", and "Seller Broker".
- Contact Details:** Includes fields for "Maple", "Meyers", "Seller Two First Name", "Seller Two Last Name", "Samuel", "Haring", "Buyer Two First Name", and "Buyer Two Last Name".

At the bottom of the form, there are two buttons: "Create" (highlighted with a green box) and "Cancel".

Note: These particular fields have been selected to allow you to later turn this zipForm Transaction into a SkySlope Transaction.

After the zipForm Transaction has been created, you will be taken to your library of available documents from zipForm.

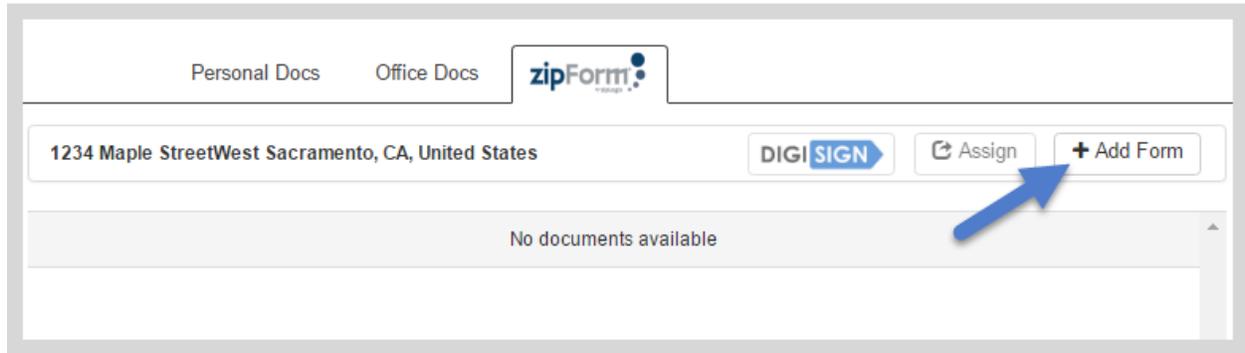
To add documents, simply select the grey circle to the left of the document's name for whichever document(s) you need. Once you're done selecting your documents, click on "Add" at the bottom of the documents list. You can use the "Select Library" drop-down to change the library you're looking at, if you're an agent in multiple states. You can also use the "Search Form" field to search for the name of a certain document, without having to scroll through the list.



The screenshot displays the 'Add Form' window from the zipForm application. At the top right is the zipForm logo. Below it, there is a 'Select Library' dropdown menu currently showing 'MAR - Michigan Association of REALTORS®'. Underneath is a 'Search Form' text input field. The main area contains a scrollable list of documents, each with a radio button on the left and a document icon on the right. The list includes: B-DA - Addendum to Listing Contact - 06/00; BSAVL - Buy and Sell Agreement - Vacant Land - 5/06; COVER5 - Coversheet; FORMA - Buy and Sell Agreement - 10/15; FORMB - Exclusive Listing Contract (Traditional Agenc...; FORMBB - Exclusive Listing Contract - Designated Agenc...; FORMC - Closing Statement (14) - 1/94; FORMD - Addendum to Buy and Sell Agreement (14) - 4/9...; FORME - Mutual Release of Buy and Sell Agreement - 8/...; and FORMF - Exclusive Authorization to Sell Business Opp ... At the bottom of the window are two buttons: a green 'Add' button and a white 'Cancel' button.

### What is this "Add Form" button under Working Documents?

Did you forget to add a document when the zipForm Transaction was initially created? You will now be able to add additional forms from the SkySlope integration. When the document is added, the relevant information from the Transaction will populate onto the document (such as property address, clients' names, etc). If you need to add new, or additional, information onto the document (like specific dates for a counter offer addendum), you will need to go into zipForm to ensure the documents are complete. Any changes that are saved should be synced within SkySlope after about 30 seconds.



### How do I send documents out for signature?

To send a document out for signature, simply open up your Working Documents section, click on the zipForm Plus tab, and go to the Transaction file it is associated with. Click the checkbox for the document to select, then choose the DigiSign button at the top of the page.

### When will I be able to use SkySlope to fill out my zipForm documents ? I'm tired of having to back and forth to zipForm and SkySlope.

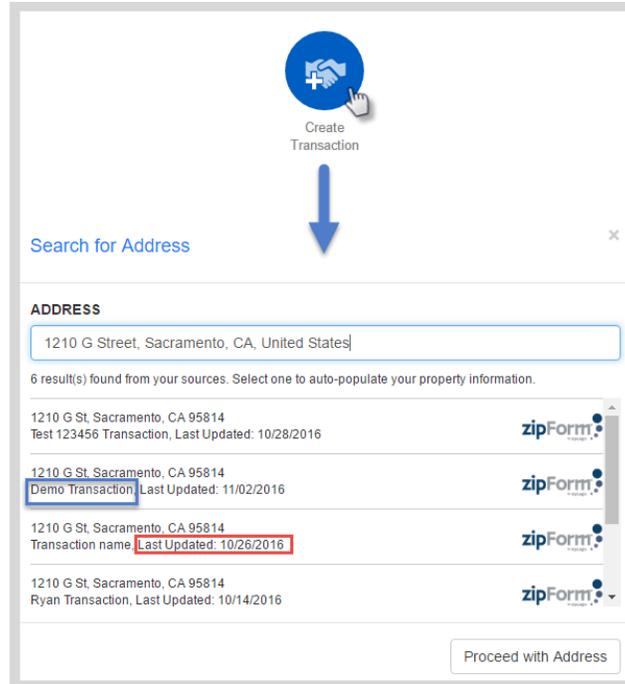
We are still perfecting this feature, and we don't currently have an ETA for release. We would be happy to be in touch as soon as we have a solid release date! [Contact SkySlope Support](#) and ask us to take down your email so that can follow up with you as soon as that feature becomes available!

### Can I use the zipForm integration to assist in creating my Listings or Transactions in SkySlope?

The answer is, Yes! Now, when you create a Listing or Transaction within SkySlope, the first thing you will see is a search bar that will allow you to search for the property address. With the newest release, that search bar will now search these areas:

1. zipForm Transactions
2. MLS Board Integrations
3. Google Maps

If you've previously created a zipForm Transaction for the property that you're now trying to create a SkySlope Transaction for, you can use the search bar to find the existing zipForm Transaction and all of the information from zipForm will be pulled into the SkySlope file.



When searching for the zipForm Transaction, if you have more than one Transaction with the same address, you can tell them apart by either looking at the **Transaction Name** (highlighted in blue above), or the **Last Updated date** (highlighted in red above). The MLS Board results will appear similar to the zipForm results. If you'd prefer to just use the Google Maps address, click on "Proceed with Address". Or close the search window entirely to enter the address manually.

I'm creating a SkySlope transaction, and I entered my property's address, but I'm not seeing a zipForm result. Why not?

We use the Google Maps search first to find the property address within the MLS Board or within your integrated zipForm account. If the address doesn't exactly match the address in Google Maps, you will need to go into zipForm and update the address so that it reads like it would on Google Maps. Once updated, you should be able to import the information.

Example of Incomplete Address: 1234 Maple, Sac CA 95841

Example of Address from Google Maps: 1234 Maple Street West Sacramento, CA, United States

Why is this field missing/wrong when I created Property File using the zipForm integration?

If you use the zipForm integration to create a SkySlope transaction file, 100% of the information entered into zipForm will be pulled into SkySlope. If there is information missing from the zipForm transaction (such as Year Built or Purchase Price), that information will be missing after the file is imported into SkySlope. At this point, you can either manually enter the information into the SkySlope file, or you can go back to zipForm and fill in the missing

information. Once you've done that, you can try to re-import the file into SkySlope and the newly-added information will be included.

### Why isn't my document being pulled over from zipForm?

We would want to start troubleshooting by checking to see if the Transaction in zipForm has a minimum of the the address filled out in association with their zipForm Transaction. They must have the *Address, City, State, and Zip* filled in within their "Transaction Info". If it is a blank form that isn't associated with a property in zipForm, they will need to do so before trying to send through DigiSign.

### Can I change out my credentials to access a different zipForm account?

Yes, just return to your "My Account" tab, click on Integrations and enter in your new credentials!

### What happens when my zipForm documents are DigiSigned?

They return to your Personal Docs section. From there, you can select the document and click "Assign" to move it into the property file, or select the document to be emailed to the other agent. The finished copy will still be found within your Completed DigiSign tab as well.

### Can a zipForm username be linked to more than one SkySlope account?

Yes! As long as both parties enter the correct credentials, you'll be able to both sign in and access documents within SkySlope!

If you have any other questions about the newest update to the zipForm + SkySlope integration, don't hesitate to contact our 24/7 Support Team! We are available by phone at 916.560.1815, send an email over to [support@skyslope.com](mailto:support@skyslope.com) or start live chat with us at [support.skyslope.com](https://support.skyslope.com)! Happy SkySloping!