

Naming a Document

Once you upload a document to a given transaction it is important that you name said document, so it is easy to find.

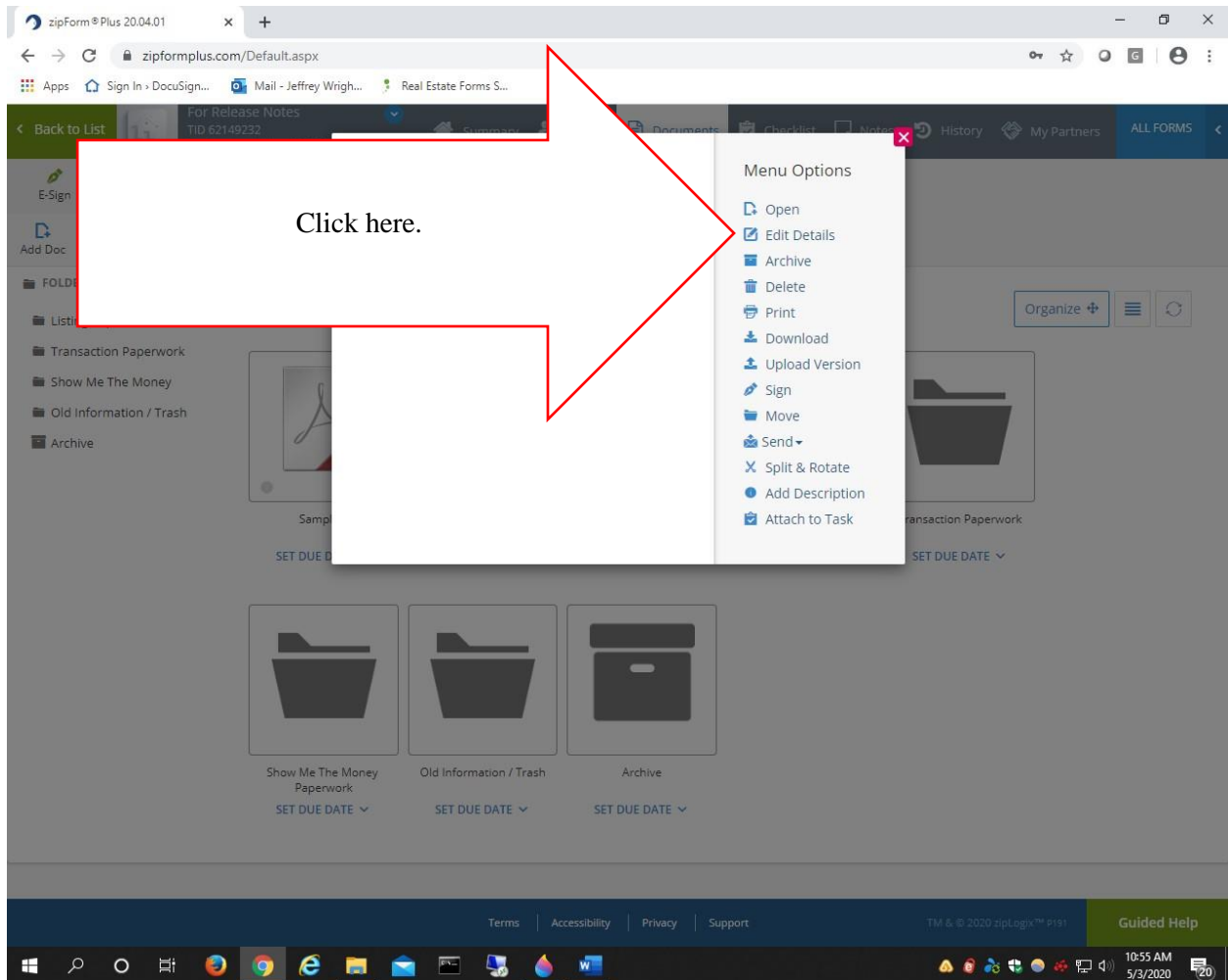
**Note: You should name the document exactly what it is. Example, a Property Condition Disclosure should be named Property Condition Disclosure.*

Hold your cursor over the specific document and click the blue circle in the upper right-hand corner.

The screenshot displays the zipForm Plus 20.04.01 web application interface. The top navigation bar includes options like 'Back to List', 'Summary', 'Parties', 'Documents', 'Checklist', 'Notes', 'History', and 'My Partners'. Below this is a toolbar with various actions: 'E-Sign', 'Share', 'Approval', 'MLS-Connect', 'Record-Connect™', 'Add Doc', 'Add folder', 'Move', 'Apply template', 'Print', 'Send', 'Save as PDF', 'Download', 'Preview', 'Copy', and 'More'. A sidebar on the left shows 'FOLDERS' such as 'Listing Paperwork', 'Transaction Paperwork', 'Show Me The Money', 'Old Information / Trash', and 'Archive'. The main content area features a search bar and a list of documents. One document, '20200430104156199', is highlighted with a blue circle in its upper right corner, indicated by a red arrow and the text 'Blue circle.' Below the document list are folders for 'Show Me The Money Paperwork', 'Old Information / Trash', and 'Archive'. The bottom of the screen shows a Windows taskbar with the time 10:54 AM on 5/3/2020.

Naming a Document

A document menu will appear, and you will click on “Edit details.”



Naming a Document

Go ahead and replace the current name with the new name for the document. If necessary, you can add a description as well. Click save to complete the process.

Name and Description.

Rename Document

Name: 20200430104156199

Choose standard name

Description:

Cancel Save

Sample 5 20200430104156199 Cover Sheet - [COVER_A] Listing Paperwork Transaction Paperwork

SET DUE DATE SET DUE DATE SET DUE DATE SET DUE DATE SET DUE DATE

Show Me The Money Paperwork Old Information / Trash Archive

SET DUE DATE SET DUE DATE SET DUE DATE

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11:04 AM 5/3/2020