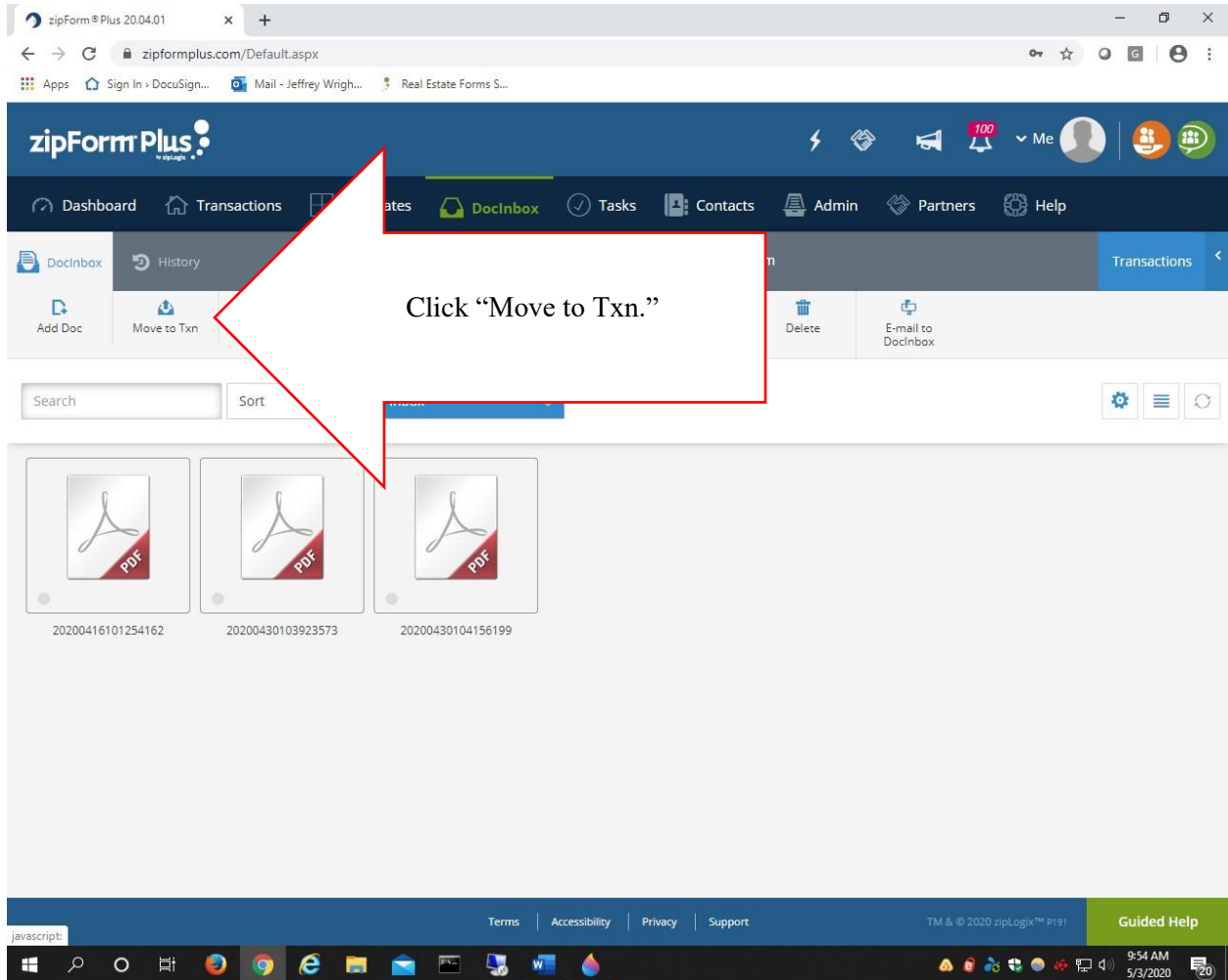


# Moving Documents from DocInbox to a Transaction

*This guide presumes that you know how to send documents to your DocInbox. If you do now know how to do this, please see the guide titled, “Scanning to Your DocInbox.”*

Once you have uploaded documents to your DocInbox, click on the “Move to Txn” button.



# Moving Documents from DocInbox to a Transaction

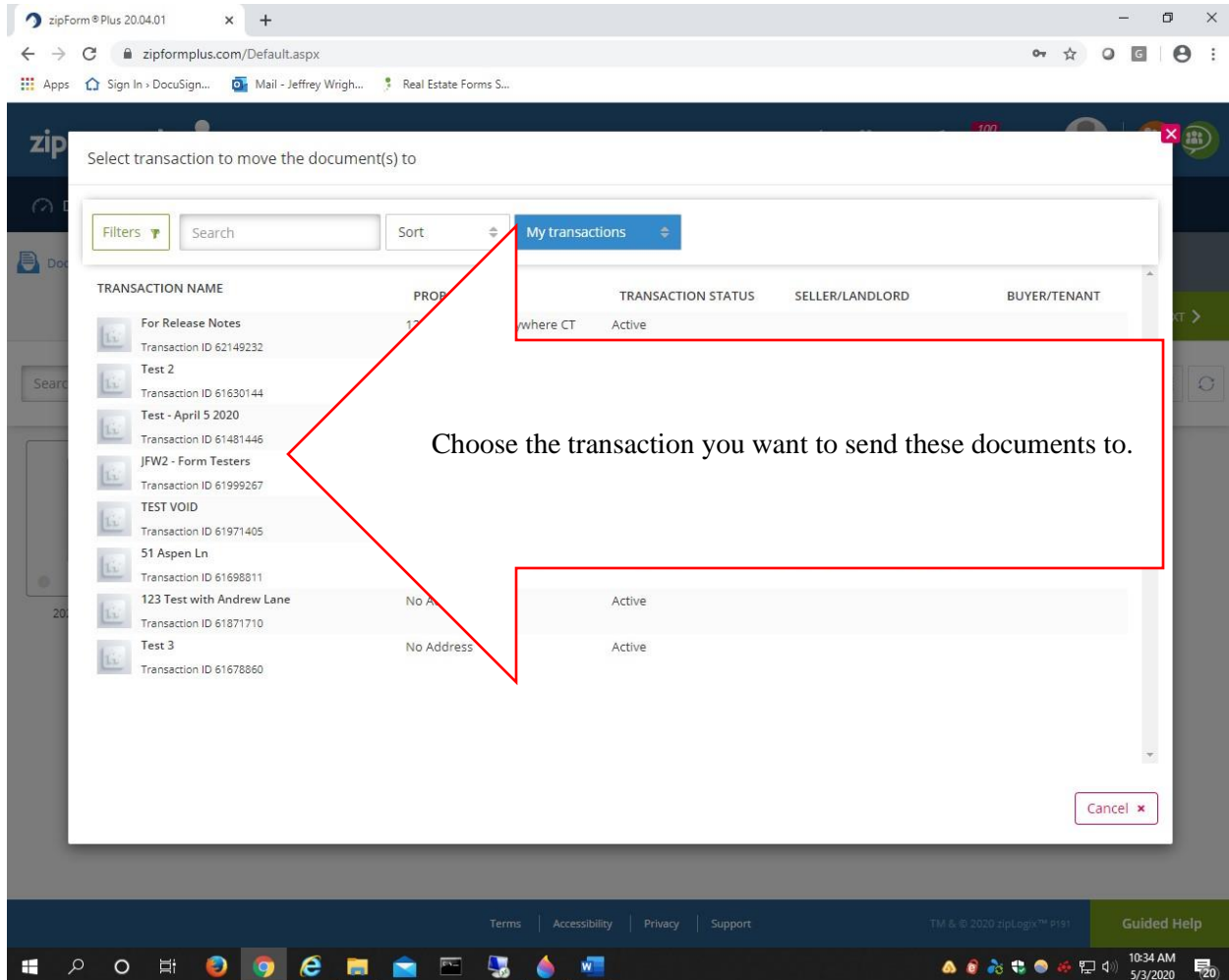
Choose the documents you want to move by clicking into the square box in the upper right-hand corner of each document you are moving.

Once you have selected each document, click “Next.”

The screenshot displays the zipForm Plus web application interface. At the top, the navigation bar includes 'Dashboard', 'Transactions', 'Templates', 'DocInbox', 'Tasks', 'Contacts', 'Admin', 'Partners', and 'Help'. Below this, the 'DocInbox' section is active, showing 'My Inbox Address: jwright\_ii872@dox.ziplogix.com'. A central instruction reads 'Select Documents To Move Then Click "Next"'. Below this, there is a search bar, a 'Sort' dropdown, and a 'My Inbox' dropdown. To the right are buttons for 'CANCEL', 'SELECT ALL', and icons for settings, list view, and refresh. Three PDF document thumbnails are visible, each with a small square selection box in its top right corner. A red arrow points from the text 'Next button.' to the green 'NEXT >' button. Another red arrow points from the text 'First, click this box for each document you want to move.' to the selection boxes on the document thumbnails. The footer contains 'Terms', 'Accessibility', 'Privacy', 'Support', 'TM & © 2020 zipLogix™ P191', and 'Guided Help'. The Windows taskbar at the bottom shows the time as 10:26 AM on 5/3/2020.

# Moving Documents from DocInbox to a Transaction

Now, you need to select the transaction that you are sending these documents to.

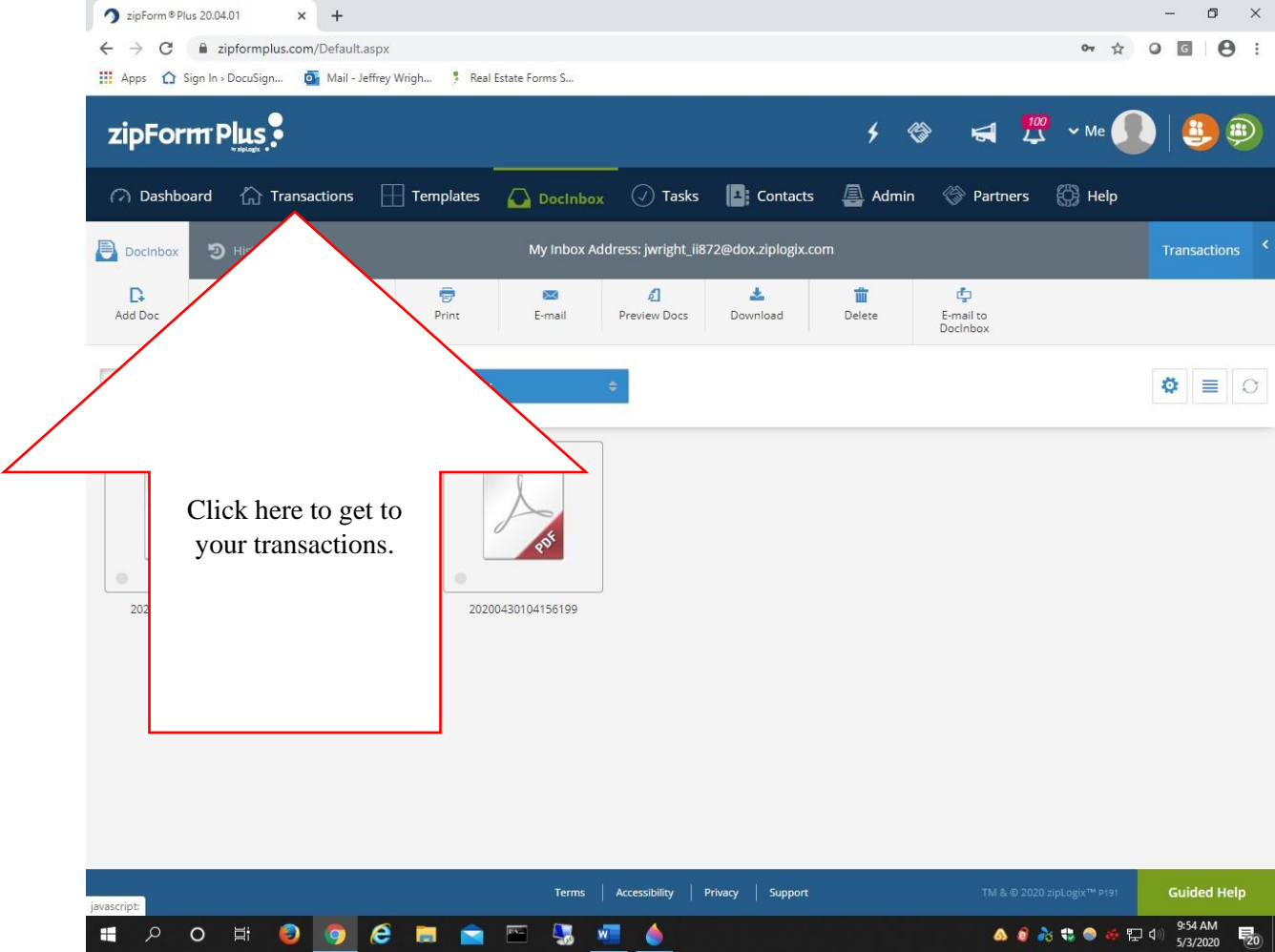


*\*Note: Once you have selected a transaction, the documents will be moved, and you will return to the DocInbox home page. The documents will no longer be visible in your DocInbox.*

*If you would like the documents to stay in your DocInbox **and** go to a specific transaction, choose “Copy to Txn” rather than “Move to Txn.”*

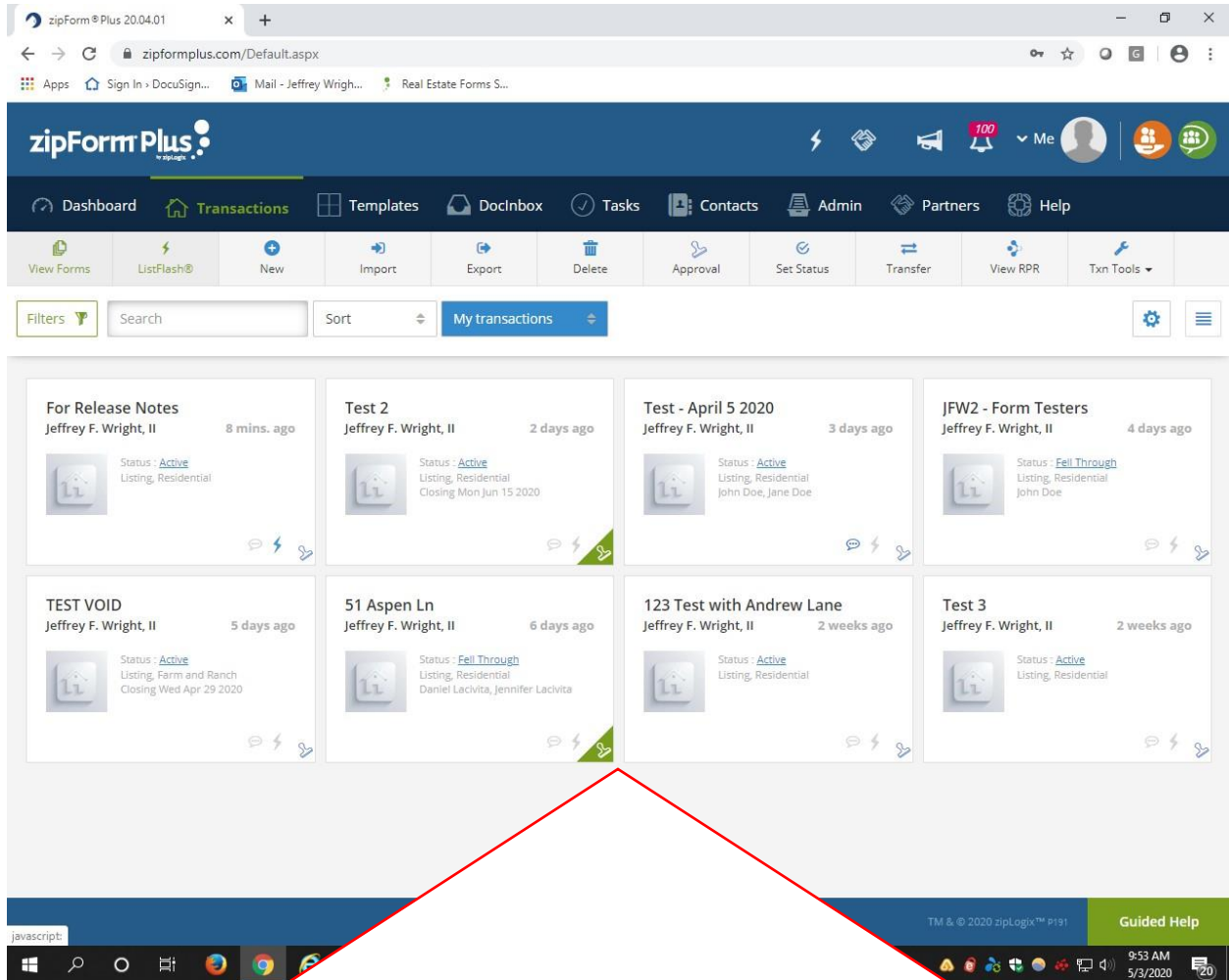
# Moving Documents from DocInbox to a Transaction

Click on the transactions icon to return to your transactions page.



# Moving Documents from DocInbox to a Transaction

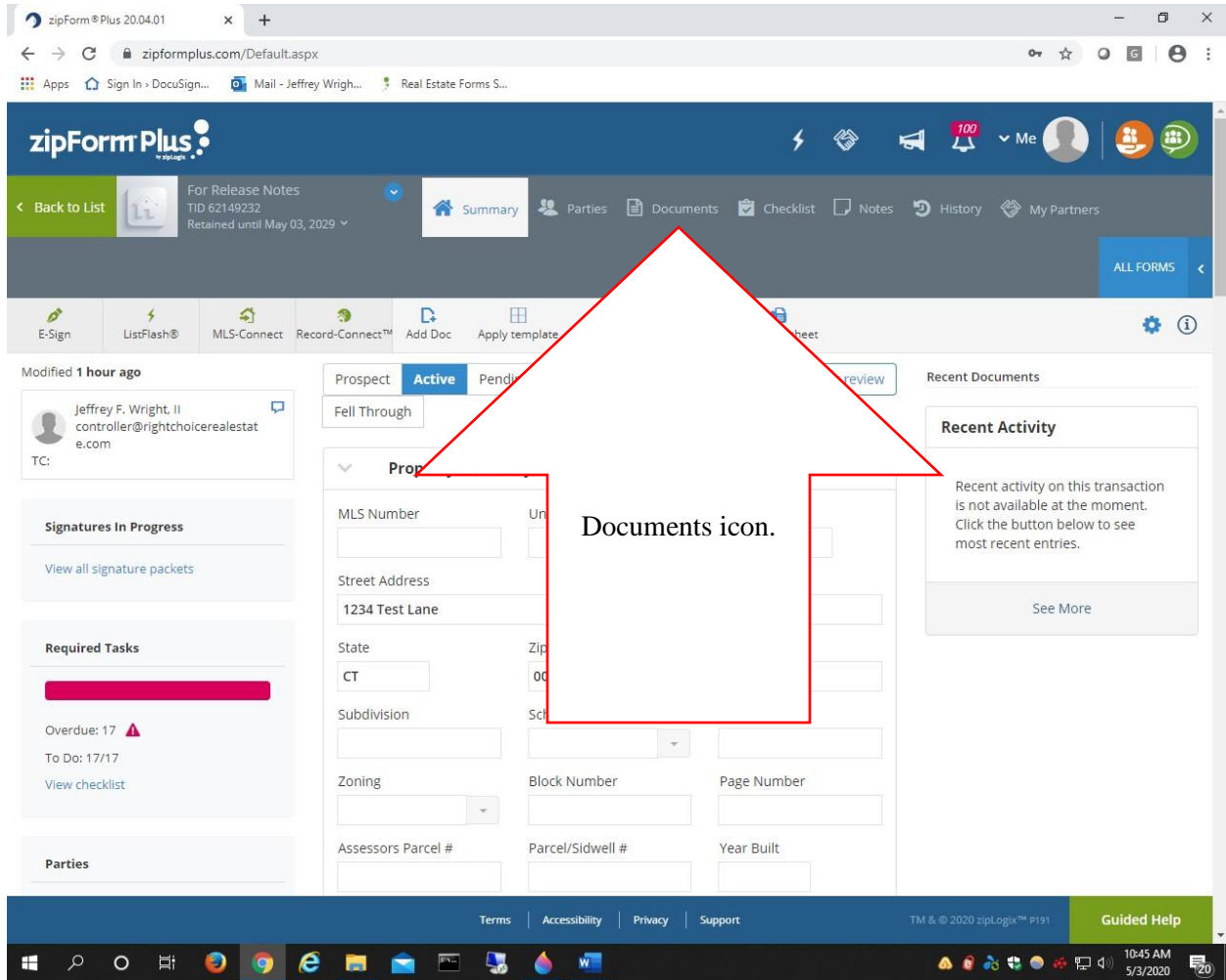
Then choose the transaction you just moved your documents to.



Choose the transaction you just sent your documents to.

# Moving Documents from DocInbox to a Transaction

When you click into a transaction, you land on the Summary Page for that transaction. From the summary page, click on the “Documents” icon.



# Moving Documents from DocInbox to a Transaction

Your documents will appear in the documents page.

zipForm® Plus 20.04.01

zipformplus.com/Default.aspx

TID: 62149232  
Retained until May 03, 2029

Summary Parties Documents Checklist Notes History My Partners

ALL FORMS

E-Sign Share Approval MLS-Connect Record-Connect™

Add Doc Add folder Move Apply template Print Send Save as PDF Download Preview Docs Copy

FOLDERS

- Listing Paperwork
- Transaction Paperwork
- Show Me The Money
- Old Information / Trash
- Archive

Filters Search Sort

Sample 5 20200430104156199 Cover Sheet [COVER\_A]

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

Organize

Your documents arrive here and can be moved to their respective folders and placeholders within their folders.

Terms Accessibility Privacy Support TM & © 2020 zipLogix™ P191 Guided Help

10:47 AM 5/3/2020