



TRANSACTIONS

zipForm Edition

Website address: <https://www.zipformplus.com/Default.aspx>

Open website, use your assigned company login and password

New Listing transaction follow pics below

DashboardFormsTransactions★TemplatesDocInboxTasksContactsAdminPartnersHelp

Txn Tools ▾

New★

Import

Transfer

Select All ✓

All

Listings

Purchases

Filters 📏

Search

Sort ▾

My transactions ▾

Transaction Information


Name★


NEW LISTING★

Select your location

Main HQ: Snyder Strategy , 8888 Keystone Crossing Ste1300 ▾

★ Import Property Information

★  zipForm Record-Connect™ ⓘ

★  MLS-Connect ⓘ

Category★

☒ Residential

☐ Commercial

☐ Industrial


☐ Vacant Land

☐ Multiunit

☐ Farm and Ranch

☐ Condominium

☐ Manufactured Home


Add Image

Status

★ ☒ Active

☐ Pending

☐ Prospect

☐ Inactive

☐ Fell Through

Agent

Jesse Snyder jesse@snyderstrategy.net ▾

Select Template

My Templates ▾

Templates Automatically Applied by Admin

Comments

Transaction Comments

Cancel ✕

Save ✓★



TRANSACTIONS

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PAGE 2 **New Listing transaction**

Complete Property Summary & Listing summary, if you have an accepted offer, complete Purchase Summary & Listing Side Commission Summary

If you have a Me & Me Deal, then complete Buying Side Commission Summary

Back to List

NEW LISTING
TID 77374040
Retained until May 13, 2028

Summary

Parties

Documents

Checklist

Notes

E-Sign

History

Marketplace

E-Sign

OfferPlace™

ListFlash®

MLS-Connect

Record-Connect™

Start CMA

Apply template

Add Doc

Send

Email to txn

Fax coversheet

Modified **just now**

Jesse Snyder
jesse@snyderstrategy.net
TC:

Signatures In Progress
[View all signature packets](#)

Required Tasks

Overdue: 0

To Do: 0/0

Review Stage:

Prospect

Active

Pending

Closed

Inactive

Fell Through

Property Summary

Listing Summary

Purchase Summary

Listing Side Commission Summary

Buying Side Commission Summary

Click Documents; Folders are automatically populated for you

Back to List

NEW LISTING
TID 77537762
Retained until May 17, 2028

Summary

Parties

Documents

Checklist

Notes

E-Sign

History

Marketplace

E-Sign

MLS-Connect

Record-Connect™

Apply template

Add Doc

Add folder

FOLDERS

Initial Listing

Ongoing Listing Contracts

Tutorial Documents

Archive

Select All

Filters

Search

Sort

Initial Listing
Contracts>CHECKLIST
SET DUE DATE

Ongoing Listing Contracts
SET DUE DATE

Tutorial Documents
SET DUE DATE

Archive
SET DUE DATE



TRANSACTIONS


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PAGE 3 **New Listing transaction**

click on Checklist and Listing Tasks-Category is automatically populated.

Due dates help complete your New Listing

[< Back to List](#)




NEW LISTING
TID 77374040
Retained until May 13, 2028 ▾

[Summary](#)

[Parties](#)

[Documents](#)


[Checklist](#) 


[Notes](#)


[E-Sign](#)

[History](#)

[Marketplace](#)

 0





Urgent Tasks


New Checklist

E-mail

Select All ✓

Filters 

Search

Sort 

Responsible Party 

Urgent Tasks

Listing Transaction Tasks - Checklist*

☐ Listing Tasks - Category

 Create a new task

STATUS	APPROVAL	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS
 <input checked="" type="checkbox"/>	Not started ▾ Submit for review	Listing Contracts uploaded REVIEW: listing contracts, RE disclosure, Office Policy In Regard to Agency, Lead Base Paint Disclosure	1 day after Listing Date	Yes	SAMPLE Contracts
<input type="checkbox"/> <input checked="" type="checkbox"/>	Not started ▾ Submit for review	MLS enter as ACTIVE within 24 hours REVIEW (see attached doc)	1 day after Listing Date	Yes	SAMPLE Marketing Listing Formula
<input type="checkbox"/> <input checked="" type="checkbox"/>	Not started ▾ Submit for review	Copies of Contracts to Sellers	1 day after Listing Date	Yes	SAMPLE Contracts
<input type="checkbox"/> <input checked="" type="checkbox"/>	Not started ▾ Submit for review	Core Listing Machine (https://www.insiderealestate.com/login): Copy & Paste Virtual, Mobile, 3D tour links REVIEW (see attached doc.) link to MLS	4 days after Listing Date	Yes	Core Listing Machine virtual, mobile & 3D Tour links
<input type="checkbox"/> <input checked="" type="checkbox"/>	Not started ▾ Submit for review	Mobile Tour Rider Sign Installed by YOU	5 days after Listing Date	Yes	rider mobile png



TRANSACTIONS

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PAGE 4 **New Purchase transaction**

New Purchase transaction follow pics below

Dashboard Forms **Transactions** Templates DocInbox Tasks Contacts Admin Partners Help

Txn Tools ▾ New Import Transfer

Select All ✓ All Listings Purchases Filters 📄 Search Sort ▾ My transactions ▾

Transaction Information

Name*

NEW PURCHASE

Select your location

Main HQ: Snyder Strategy , 8888 Keystone Crossing Ste1300

Import Property Information

MLS-Connect ⓘ

zipForm Record-Connect™ ⓘ

Category*

- ☒ Residential ☐ Commercial
☐ Industrial ☐ Vacant Land
☐ Multiunit ☐ Farm and Ranch
☐ Condominium ☐ Manufactured Home



Add Image

Status

- ☐ Active ☒ Pending ☐ Prospect
☐ Inactive ☐ Fell Through

Agent

Jesse Snyder jesse@snyderstrategy.net

Select Template

My Templates

Templates Automatically Applied by Admin

Template Name	Scope	Checklists
Purchase	Global	true

Comments

Transaction Comments

Cancel ✕

Save ✓



TRANSACTIONS

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PAGE 5 **New Purchase transaction**

Complete Property Summary, Purchase Summary & Buying Side Commission Summary

[Back to List](#)

NEW PURCHASE
TID 77374952
Retained until May 13, 2028

Summary

Parties Documents Checklist Notes E-Sign History Marketplace

E-Sign MLS-Connect Record-Connect™ Start CMA Apply template Add Doc Send Email to txn Fax coversheet

Modified **Just now**

Jesse Snyder
jesse@snyderstrategy.net
TC:

Review Stage:

Prospect Active **Pending** Closed Inactive Fell Through

> **Property Summary**

> **Purchase Summary**

> **Buying Side Commission Summary**

> Listing Summary

> Listing Side Commission Summary

Signatures In Progress

[View all signature packets](#)

Required Tasks

Overdue: 0

To Do: 0/0

Click Documents; Folders are automatically populated for you

[Back to List](#)

NEW PURCHASE
TID 77537832
Retained until May 17, 2028

Summary Parties **Documents** Checklist Notes E-Sign History Marketplace

E-Sign MLS-Connect Record-Connect™ Apply template Add Doc Add folder

FOLDERS

[Initial Buying](#)

[Ongoing Buying Contracts &](#)

[Tutorial Documents](#)

[Archive](#)

Select All

Filters

Search

Sort

Initial Buying
Contracts>CHECKLIST
SET DUE DATE

Ongoing Buying Contracts
& Closing Docs>CHECKLIST
SET DUE DATE

Tutorial Documents
SET DUE DATE

Archive
SET DUE DATE




TRANSACTIONS

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PAGE 6 **New Purchase transaction**


click on Checklist and Buying Transaction To Do List-Category is automatically populated.
Due dates help complete your New Purchase.


[< Back to List](#)




NEW PURCHASE
TID 77537832
Retained until May 17, 2028 ▾

[Summary](#) [Parties](#) [Documents](#) [Checklist](#) [Notes](#) [E-Sign](#) [History](#) [Marketplace](#)

 Urgent Tasks

 New Checklist

 E-mail



[Select All](#) ✓[Filters](#) ▾

Sort ▾

Responsible Party ▾

Urgent Tasks

Transaction Dates

 Buying Transaction Tasks - Checklist*☐ Buyer Transaction To Do List - Category Create a new task

	STATUS	APPROVAL	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS
	Not started ▾	 Submit for review	Purchase Agreement & Counter Offers: Send to Office & Clients	May 17, 2021	Yes	Buyer Playbook
<input type="checkbox"/>	Not started ▾	 Submit for review	Email>Purchase Agreement Counter offers to Lender and Title Co.	May 17, 2021	Yes	SAMPLE Contracts
<input type="checkbox"/>	Not started ▾	 Submit for review	COPY of Earnest Money uploaded	May 18, 2021	Yes	--
<input type="checkbox"/>	Not started ▾	 Submit for review	Earnest Money SENT/RECEIVED to Title Co. and or other Brokerage Firm	May 18, 2021	Yes	Commission Deposit & Closing Package



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PAGE 6 Key Training Tips

This FORMAT can be obtained by the gear wheel in the upper right corner of pic

Dashboard Forms **Transactions** Templates DocInbox Tasks Contacts Admin Partners Help

Txn Tools New Import Transfer

Select All All Listings Purchases Filters Search Sort My transactions

Active (1)

TRANSACTION NAME	TRANSACTION STATUS	SELLER/LANDLORD	BUYER/TENANT	PROP ADDRESS	CREATED	RETENTION DATE
<input type="checkbox"/> NEW LISTING Jesse Snyder Transaction ID 77537762	Active Submit for review			NEW LISTING, Nappanee IN	16 mins. ago Modified: 15 mins. ago	Wed May 17 2028

Pending (1)

TRANSACTION NAME	TRANSACTION STATUS	SELLER/LANDLORD	BUYER/TENANT	PROP ADDRESS	CREATED	RETENTION DATE
<input type="checkbox"/> NEW PURCHASE Jesse Snyder Transaction ID 77537832	Pending Submit for review			NEW PURCHASE, Nappanee IN	14 mins. ago Modified: 13 mins. ago	Wed May 17 2028

Closed (0)

Inactive (0)

Fell Through (0)

Prospect (1)

TRANSACTION NAME	TRANSACTION STATUS	SELLER/LANDLORD	BUYER/TENANT	PROP ADDRESS	CREATED	RETENTION DATE
<input type="checkbox"/> NEW PROSPECT PURCHASE Jesse Snyder Transaction ID 77537952	Prospect Submit for review			NEW LISTING, IN	11 mins. ago Modified: 10 mins. ago	Wed May 17 2028

Every Buyer Offer, place under Prospect Category, until accepted offer, then documents can be moved to a me & me deal (if it is listing) or simply click on tab to place as PENDING status

Transaction Information

Name*
NEW ADDRESS

Select your location
Main HQ: Snyder Strategy , 8888 Keystone Crossing Ste1300

Import Property Information

☐ zipForm Record-Connect™

Category*

☒ Residential ☐ Commercial
☐ Industrial ☐ Vacant Land
☐ Multiunit ☐ Farm and Ranch
☐ Condominium ☐ Manufactured Home

Status

☐ Active ☐ Pending ☒ Prospect
☐ Inactive ☐ Fell Through

Agent
Jesse Snyder jesse@snyderstrategy.net

Select Template
My Templates

Templates Automatically Applied by Admin

Template Name	Scope	Checklists
Purchase	Global	true

Comments
Transaction Comments

Cancel Save