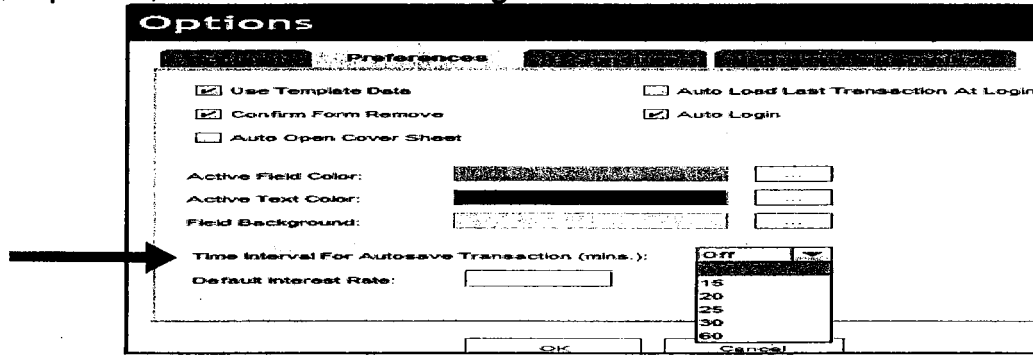


# ZipForm6 Set Up Tips

For ZipForm 6 Professional (Online) & Standard (Desktop)  
(only needs to be done **1 time for each program**)

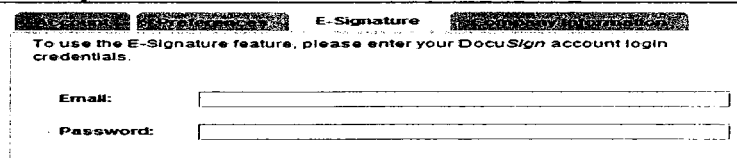
**\*\*\*To set Auto Save:**

Tools, Options, Preferences: Change 'Time interval for autosave' to 15 minutes.



**\*\*\*If you purchased 'E-Signature (DocuSign) :**

Tools, Options, E-Signature: Fill in your Email and Password.

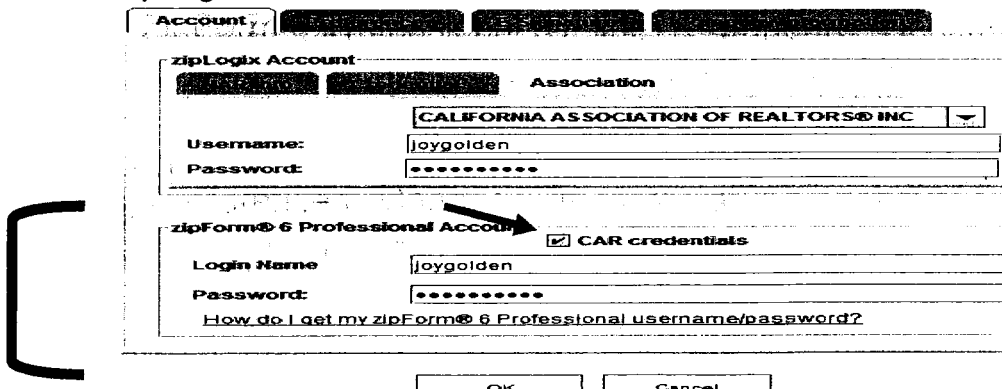


## FILE MANAGEMENT Set Up

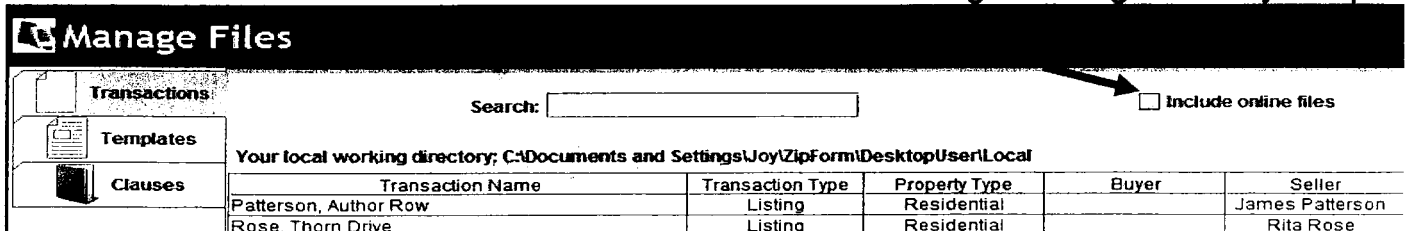
**\*\*\* To Sync between ZipForm 6 Standard and ZipForm 6 Professional \*\*\***

(so you always have the latest version in both places)

1. Open ZipForm 6 Standard (desktop).
2. Click Tools, Options, Account and fill in the bottom with your CAR.org (ZipForm6 Professional) Sign in name and Password. Checkmark CAR Credentials!



Now when you click 'File, Manage Files', you will be able to Sync the latest version.  
**IMPORTANT:** Checkmark 'Include online files' in the dialog box to get the Sync option.



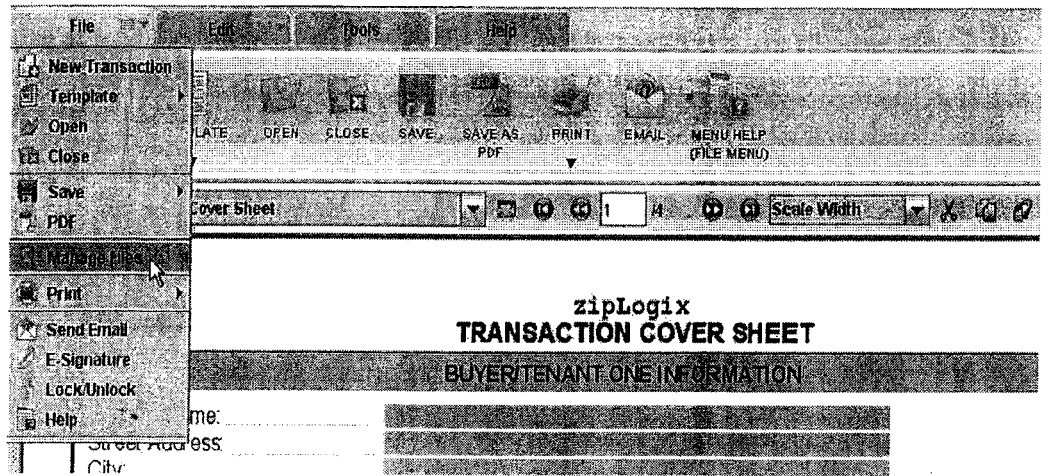
# File Management

**Manage where files are stored at all times:** The **Manage Files** option on the File Menu allows a user to control which files are stored online (within zipForm 6 Professional), and which files are stored on the computer's hard drive (within zipForm 6 Standard)



Manage Files option on the File Menu.

Clicking Manage Files allows a user to import files to or from online storage.

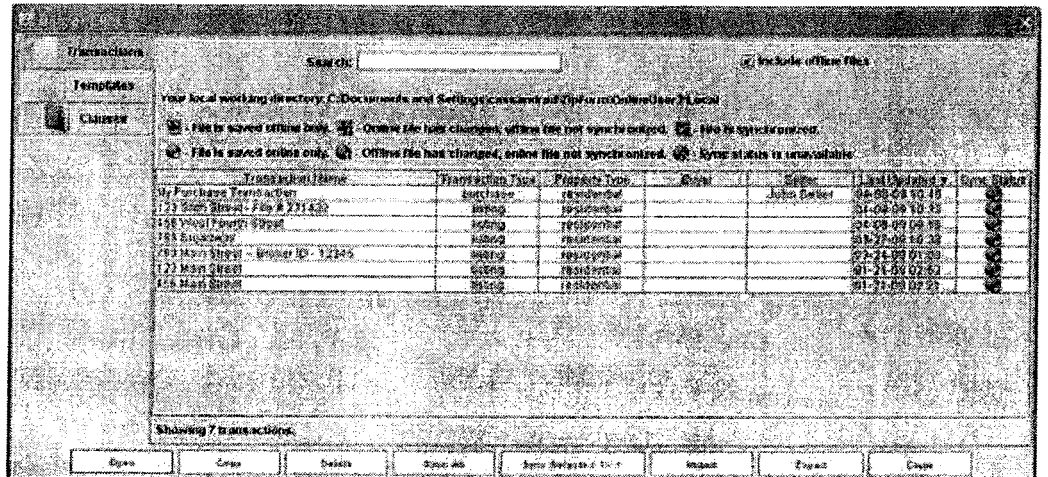


The Manage Files window provides a list of all Transactions, Templates, or Clauses. A user may review and manage these files from this window.

Manage Files window. Check the Include offline files box to see online and offline files.

The Sync Status icon indicates where the file is stored, and whether online and offline copies are the same (synchronized).

Click a file name to select it. Click a button to open, copy, delete, sync, import or export a file.



Synchronizing files saves identical copies of the file online and on the computer. Select more than one file by holding down the SHIFT or CTRL key on the keyboard, then click Sync Selected in order to sync to an online version (overwriting any changes to the version of this file on this computer), or sync to an offline version (overwriting any changes to the version of this file online). Use the Import or Export buttons to import a file or export a file saved in a different location (such as a CD). If the Sync status is unavailable, then the computer is not connected to the internet.

**Notes:**

In order to do File Management Syncing functions, you must first set up your ZipForm 6 Standard.

see 'ZipForm 6 Set Up Tips' FILE MANAGEMENT Set Up section.

# **\*\*\* ePUBS™ for zipForm® 6 \*\*\***

## **Use ePUBS to deliver mandated & consumer disclosure material to clients.**

### **How To Add the e-PUBS (free member benefit) Library to ZipForm 6.**

#### **For zipForm® 6 Professional:**

1. Log in to your account via **www.car.org**
2. Select the "Shop" at the top right hand corner of the screen
3. Click on the "Shop for Additional Products" link
4. Select "Forms" button and click "Add to cart"
5. Click "Add to cart" on the ePUBS™ product item and click Continue button
6. Follow order process to complete the order
7. ePUBS™ library is available in the Library Forms drop-down menu, in the Forms tab

#### **For zipForm® 6 Standard:**

1. Launch zipForm® 6 Standard on your Desktop screen
2. Select the "zipForm Store" located inside Help tab (an internet connection is required)
3. Select "Shop for Additional Products" link
4. Select "Forms" button and click "Add to cart"
5. Click "Add to cart" on the ePUBS™ product item and click Continue button
6. Follow order process to complete the order
7. ePUBS™ library is available in the Library Forms drop-down menu, in the Forms Manager page

\*\* An internet connection is required to download the ePUBS™ for zipForm® 6 library. Download times may vary, but expect download to take about five minutes, as there are a couple of large files in the ePUBS™ for zipForm® 6 library. \*\*

