

# Saving zipForms Plus Transactions

**In this guide we will review how to save transactions as PDFs from the zipForms Plus tool**

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## Open zipForms Plus

The screenshot shows the CBA Commercial Brokers Association website. The top navigation bar includes 'HOME', 'SERVICES', 'REPORTS', 'RESOURCES', 'FIND PEOPLE', 'CONTACT US', and 'SUPPORT'. The 'RESOURCES' dropdown menu is open, listing various items: Membership Information, Marketing Tools, Forms, Education, Widget Search, News, Rules & Legal, Broker Update Form, Legal Library, Office Application, Associate Member Application, and Appraiser Application. The 'zipForms Plus' option is highlighted with a yellow border. The background features a map of Seattle and a search bar for 'Commercial Listings'. Other elements include social media icons, a 'Live Support' chat window, and an 'Events' section with a calendar showing 'OCT 22' and a notice about a cancelled event.

**Click on the first transaction – This process will need to be repeated for every transaction**

The screenshot displays the zipForm Plus web application interface. At the top, the logo for zipForm Plus by zipLogix is visible on the left, and navigation icons for a megaphone, chat, notifications (with a red '1'), user profile (Me), and social media are on the right. Below the logo is a dark blue navigation bar with icons and labels for Dashboard, Transactions, Templates, Tasks, Contacts, Partners, Shop, and Help. Underneath this is a light grey toolbar with icons and labels for View Forms, New, Import, Export, Delete, Set Status, and Txn Tools. A search bar with a 'Filters' icon and a 'Sort' dropdown menu is present, with 'My transactions' selected in the dropdown. The main content area shows a grid of transaction cards. The first card, titled 'Testing' by Megan Reuther, is highlighted with a yellow border and has a 'just now' timestamp. Other cards include 'test', 'july 2', 'June 26', 'June 25', 'Untitled', '321', and 'test456', all by Megan Reuther, with various timestamps and statuses. At the bottom, a dark blue footer contains links for Terms, Accessibility, Privacy, and Support, along with the copyright notice 'TM & © 2018 zipLogix™ P191' and a 'Guided Help' button.

zipForm Plus

Dashboard Transactions Templates Tasks Contacts Partners Shop Help

Testing TID 42597064 Retained until Jul 02, 2023

Summary Parties Documents Checklist Notes History Services

ALL FORMS

## Select Documents

Property Summary Record-Connect

Cancel Save

Megan Reuther  
megan@commercialmls.com

Purchase Commercial  
TID 42597064  
Modified 3 mins. ago

zipForm Plus

Dashboard Transactions Templates Tasks Contacts Partners Shop Help

Testing TID 42597064 Retained until Jul 02, 2023

Summary Parties Documents Checklist Notes History Services

ALL FORMS

E-Sign Share MLS-Connect Record-Connect Add doc Add folder Move to folder Apply template Print Email Save as PDF Preview Docs Copy Delete

### FOLDERS

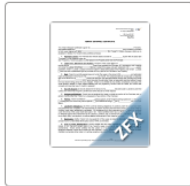
Nothing here yet. Folders you create will be shown here.

Filters

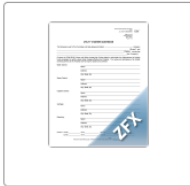
Search

Sort

Organize



Tenant Estoppel Certificate - [PS-TEC]



Utility Charges Addendum - [UA]



Form 17 Commercial Seller Disclosure

## Save as PDF

Select Documents And/Or Forms To Save Then Click Next

Next

NEXT >

⚠️ The End User License Agreement prohibits the modification of documents produced by this software in third party applications.

FOLDERS

Nothing here yet. Folders you create will be shown here.

Filters 📄 Search Sort ▾



Tenant Estoppel Certificate - [PS-TEC]

Utility Charges Addendum - [UA]

Form 17 Commercial Seller Disclosure

CANCEL ✕ SELECT ALL ✓ ☰ ↻

Select All Forms

[← BACK](#)




Select Save Options Below

[SAVE >](#)

- Save in transaction
- Save to my device
- Single PDF file (forms only)
- Separate PDF files
- Include Form Sticky Notes

**Select Save to my device**  
**Select Single PDF file**  
**Then click Save**

\* Drag and Drop to change the order of documents

PS-TEC Tenant Estoppel Certificate	
UA Utility Charges Addendum	
17 Form 17 Commercial Seller Disclosure Statement	

The screenshot shows the zipForm Plus web application interface. A modal window titled "File Download" is centered on the screen. The modal contains the following text: "Click on Click to download .PDF" in red, "Your file(s) are ready to download. The file is in .PDF format. Click on the link below to download.", a green button labeled "Click to download .PDF file now." with a PDF icon, and "Google chrome will ask you what to do with the file click on the Keep button." Below this is a Chrome security warning: "This type of file can harm your computer. Do you want to keep tmp\_cce27fb2-6f72-....pdf anyway?" with "Keep" and "Discard" buttons. A "Close" button is at the bottom of the modal. The background interface shows a dashboard with navigation tabs like "Dashboard", "Transactions", "Back to List", "E-Sign", "Share", "MLS-Connect", and "Records". A specific transaction is highlighted with details: "Testing TID 42597064 Retained until Jul 02, 2023". Below this are folders and document thumbnails for "Tenant Estoppel Certificate - [PS-TEC]", "Utility Charges Addendum - [UA]", and "Form 17 Commercial Seller Disclosure". The footer includes "Terms", "Accessibility", "Privacy", "Support", "TM & © 2018 zipLogix™ P70", and "Guided Help".

**Your files will save to your Downloads folder on your C drive. Repeat this process for all transactions saved on the zipForms platform.**