

Access your zipForm account through the browser on your mobile device to manage your transactions on-the-go. Open and edit forms, view PDF files, and complete paperless signatures anytime, anywhere with zipForm® Mobile.

## Launch a web browser on your mobile device

1. Open a **browser** app, such as Google Chrome, on your mobile device.

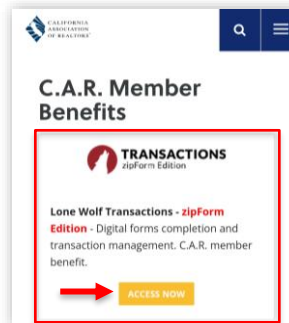


2. Go to [www.car.org](http://www.car.org).

3. Tap **Access Transactions**.

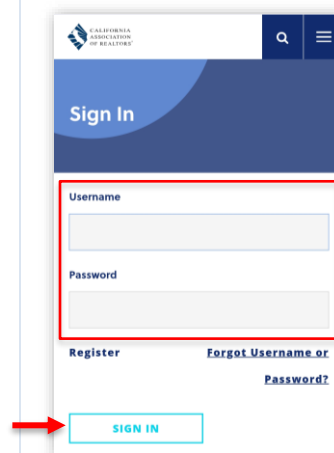


4. Scroll down and tap the yellow **Access Now** button on the “Transactions zipForm Edition” tile.



5. Type your username and password.

6. Tap .



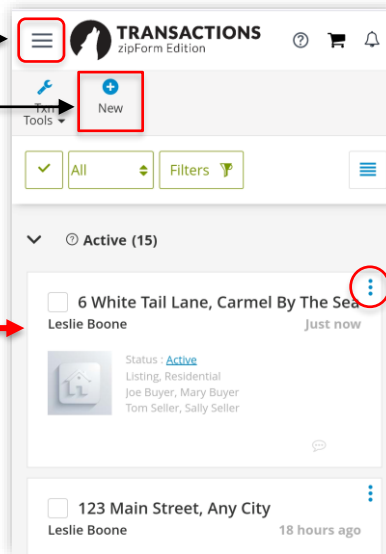
## Navigation

Tap to navigate to Dashboard, Templates, Contacts, etc.

Tap to create a new transaction.

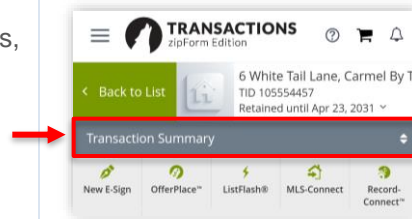
Tap to open a transaction.

Tap to open the **More Actions** menu for functions like Copy and Delete.



## Inside your Transaction

1. Tap **Transaction Summary** to navigate to the Documents tab, and other tabs like Parties, E-Sign, etc.

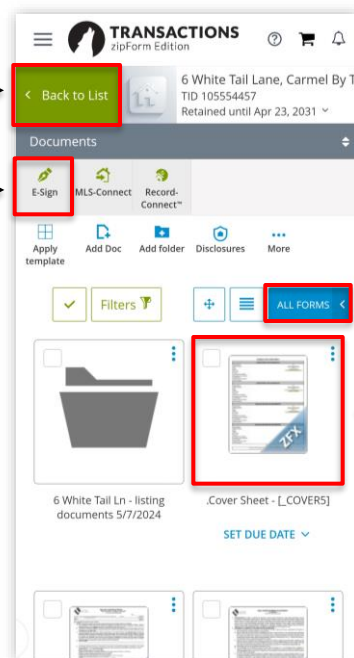


Tap to exit the transaction and return to the Transactions page.

Tap to start a signature packet.

Tap to add a form from your form libraries.

Tap to open a document in the form editor.



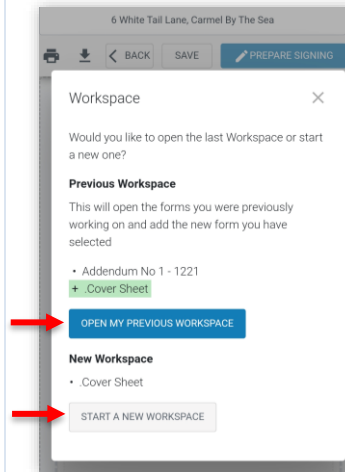
## Working in the Form Editor

The system will remember what forms you had open in the Workspace the last time you were in this transaction.

1. If you are prompted with the Workspace window, choose one of the following:

- **OPEN MY PREVIOUS WORKSPACE** = choose this if you'd like to put all documents listed above back into the Workspace.
- **START A NEW WORKSPACE** = choose this if you'd like to put just the document you selected into the Workspace.

2. The form editor will display after you make a selection.

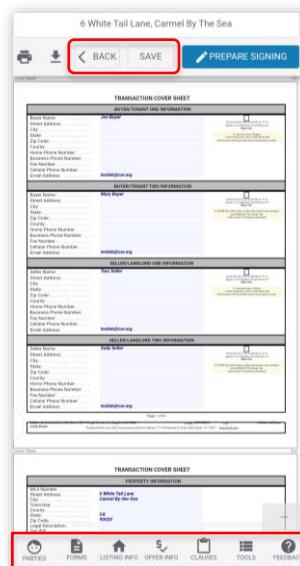


### 3. Form Editor – vertical view.

If you are holding your mobile device vertically, the form editor will display with the tabs at the bottom of the screen.

You will still need to use the SAVE and BACK buttons at the top of the screen to save your changes and exit the form editor to return to your transaction.

**NOTE: DO NOT use your device's back button as that will sign you out of zipForm.**

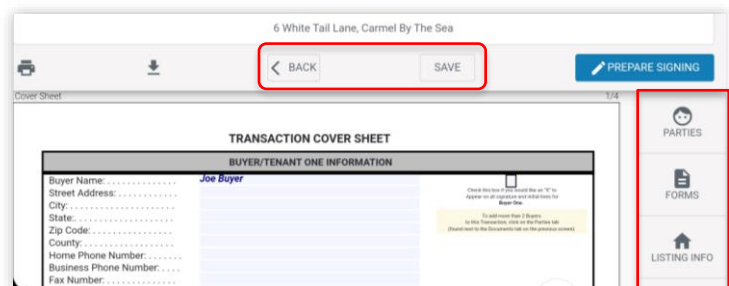


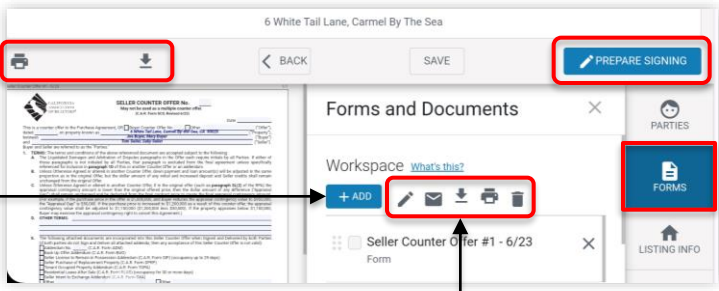
### 4. Form Editor – horizontal view.

If you are holding your mobile device horizontally, the form editor will display with the tabs on the right side of the screen, similar to how it looks on a computer.

You will still need to use the SAVE and BACK buttons at the top of the screen to save your changes and exit the form editor to return to your transaction.

**NOTE: DO NOT use your device's back button as that will sign you out of zipForm.**





Tap to print or download *all forms in the Workspace.*

Tap to add a form from your form libraries or upload a PDF.

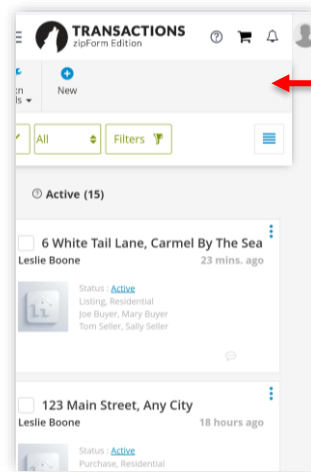
Tap to start a signing packet with *all forms in the Workspace.*

Tap to open the Workspace.

For *selected documents*, tap to E-Sign, Email, Download, Print, and Delete.

## Sign Out of your Account

1. Swipe the screen from right to left to display the profile photo in the top right corner.



2. Tap the **profile photo** in the top right corner.  
3. Tap **Sign Out** on the menu behind your agent information.

