

Approving documents and files online streamlines the file review process, reduces paperwork, and provides a smooth and easy closing process. Document and Transaction File Approval features allow you to review and approve documents within your team or office electronically. Individual zipForm® forms, PDF documents, folders, or complete transaction files can be flagged for review using the "Needs Approval" approval status by the agent, coordinator, assistant, broker, admin or file manager.

Approval

- 1) Click the **Approval Icon** on the transaction or document
- 2) Click the **Approval Status** to Clear, Needs Approval, Approved\* or Not Approved\*  
\* Can only be done by a Broker or Admin in zipForm® Plus
- 3) (Optional) Type approval **comments** (up to 500 characters)
- 4) Click **Apply**

Brokers and managers (zipForm® Plus Admins) are able to sign in securely online from anywhere and review documents and files electronically, recording notes about the overall review, and marking a file as approved or not approved. The agent who owns the transaction receives an email immediately notifying them of the change in approval status, and the comments from the office. To add approval to your account, contact zipLogix® sales at: 866-627-4729

