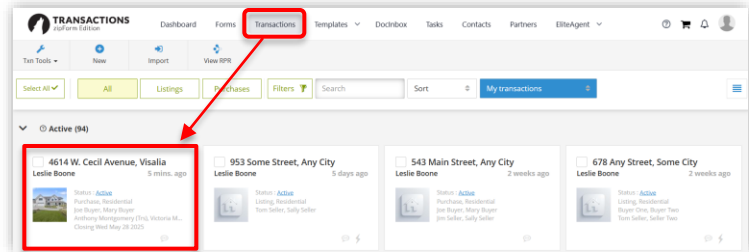


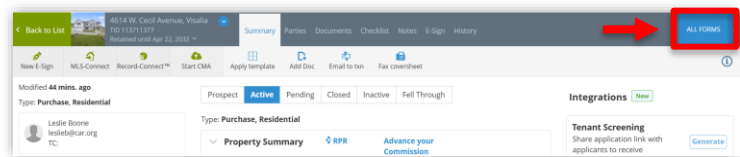
There are multiple ways to find C.A.R. forms in zipForm and add them to your transaction. This guide shows the steps for the different methods to find and add forms.

'All Forms' Button inside a Transaction

1. On the **Transactions** tab in your zipForm account, click to open a transaction.



2. Click **ALL FORMS** at the top right.



3. On the **Form Libraries** menu, select the **California Association of Realtors®** library from the dropdown list.

4. **Search** – (optional) type a keyword in the form name or a form acronym in the **Search** box to find specific forms.

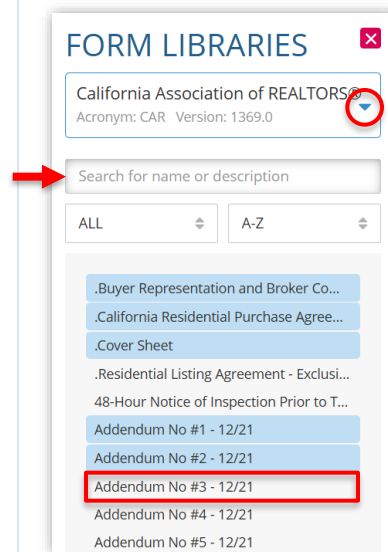
5. **Filter** – (optional) click the menu labeled “All” and choose the forms to display by transaction type.

6. **Sort** – (optional) click the menu labeled “A-Z” to sort the list of forms alphabetically or by form number.

7. Click on a form name in the list that is *not* highlighted in blue to add it to your transaction.

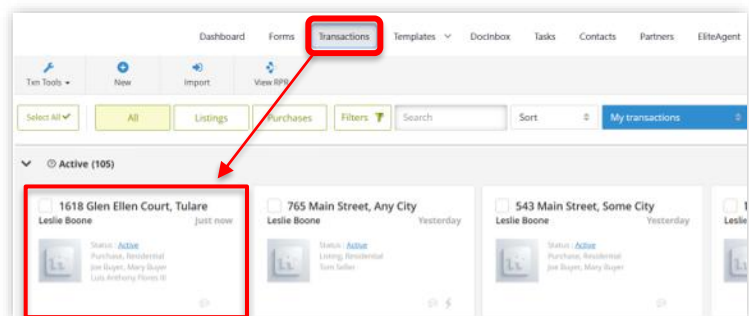
NOTE: Forms highlighted in blue are already in the Documents tab of your transaction.

8. Click **X** at the top right to close the **Form Libraries** menu.

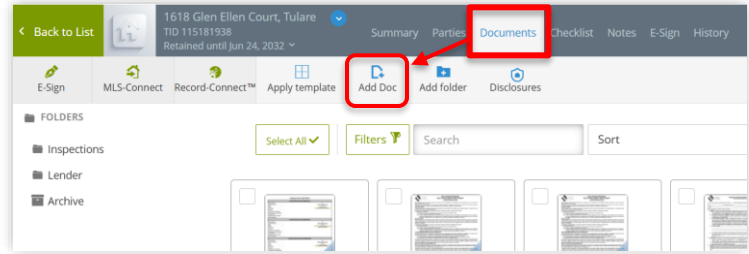


'Add Doc' Button inside a Transaction

1. On the **Transactions** tab in your zipForm account, click to open a transaction.



2. Click **Documents** in the gray navigation bar at the top, then click **Add Doc** in the toolbar.



3. On the Add a Form menu, click the **Add Form** button on the right to access the **Form Libraries** menu.

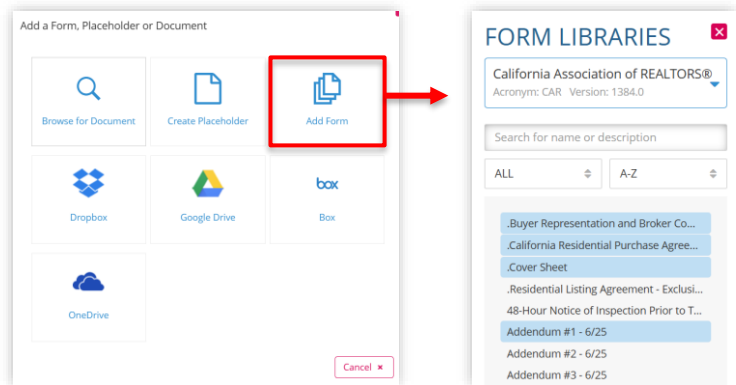
4. Select the **California Association of Realtors®** library from the dropdown list at the top of the **Form Libraries** menu.

5. (optional) **Search** – type a keyword in the form name or a form acronym in the **Search** box to find specific forms.

6. Click on a form name in the list that *is not* highlighted in blue to add it to your transaction.

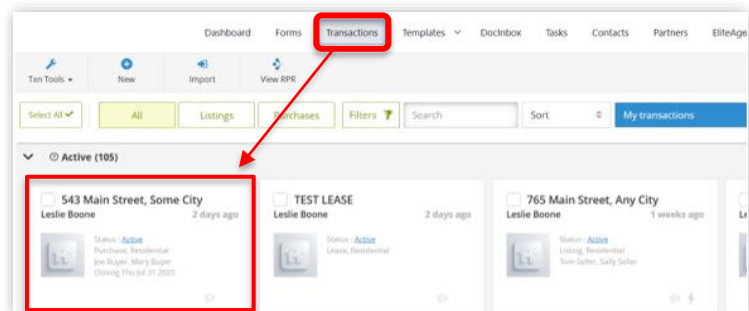
NOTE: Forms highlighted in blue are already in the Documents tab of your transaction.

7. Click **X** at the top right to close the **Form Libraries** menu.

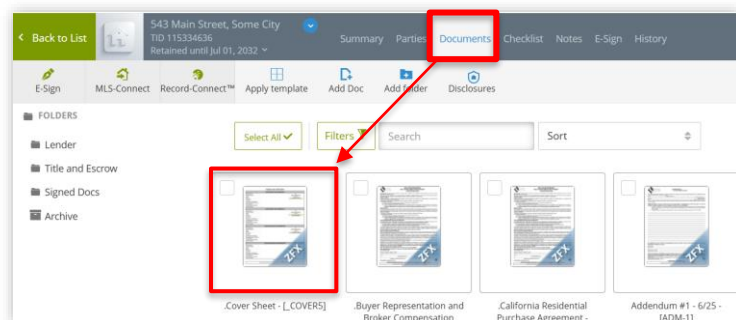


'ADD+' Button in the Form Editor inside a Transaction

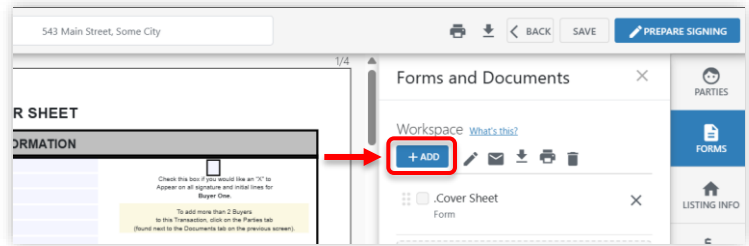
1. On the **Transactions** tab in your zipForm account, click to open a transaction.



2. Click the **Documents** tab in the gray navigation bar, then click on a form to open it in the Form Editor.

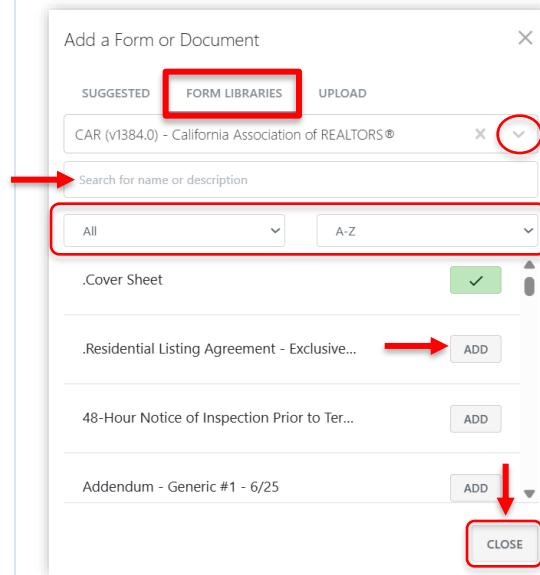


3. Click **+ ADD** in Workspace.



4. On the popup window, click **Form Libraries**, then do the following:

- **Change Libraries** – click the dropdown arrow to the right of the library displayed to select the C.A.R. library
- **Search** – (optional) type a keyword or form acronym in the Search bar to locate a form in the list
- **Filter** – (optional) click the menu labeled “All” and choose the forms to display by transaction type
- **Sort** – (optional) click the menu labeled “A-Z” to sort the list of forms alphabetically or by form number

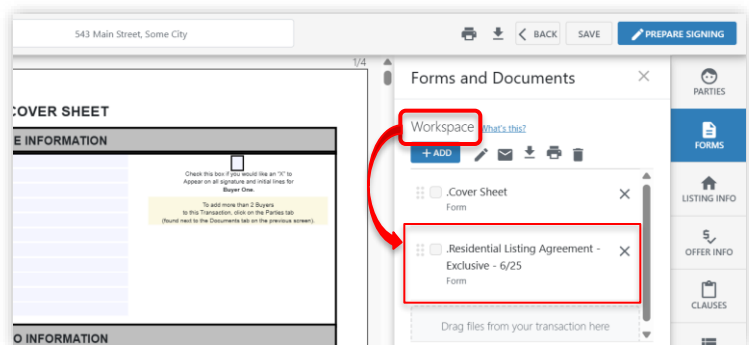


5. Click **ADD** next to a form to add that form to your transaction.

NOTE: Forms with a green box and a checkmark next to it means the form is already in the Documents tab of your transaction.

6. Click **CLOSE** at the bottom right to close the window.

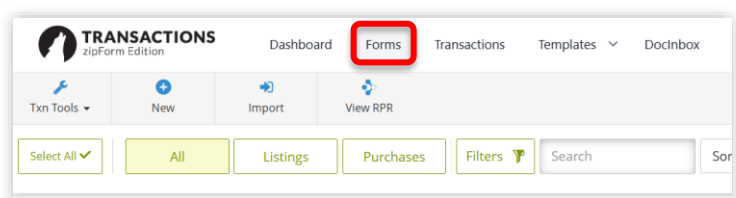
The forms will automatically be added to the **Workspace**.



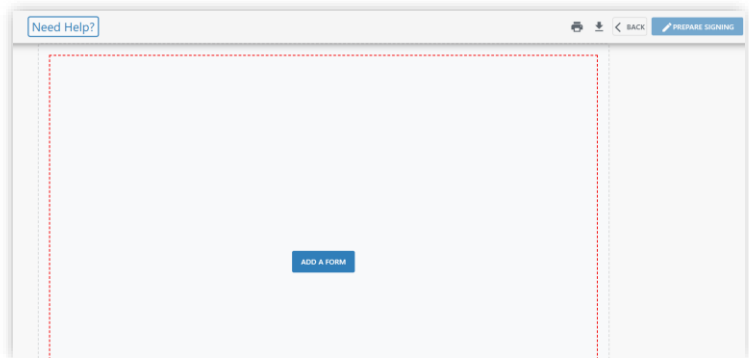
Forms Tab in your zipForm Account (not recommended)

IMPORTANT: There is NO 'Save' button in the Forms tab. To save your work, select the Print, Download, or Prepare Signing option, which will require you to first create a transaction.

1. Click the **Forms** tab in the top navigation bar inside your zipForm account.



2. Click **ADD A FORM** in the middle of the page to get started.

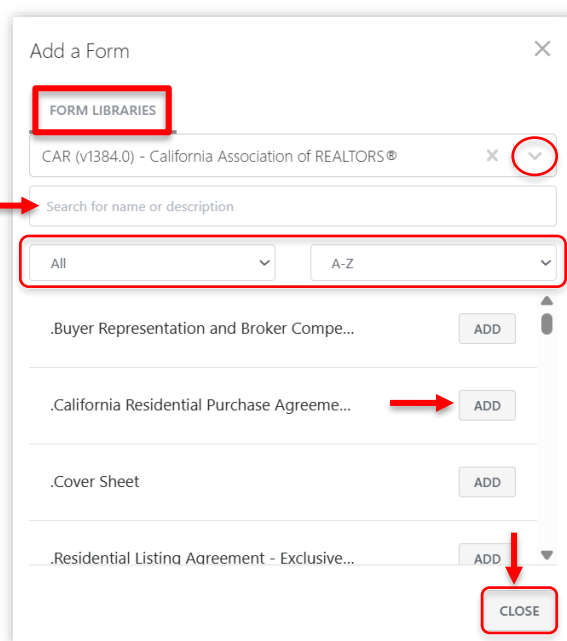


3. On the **Form Libraries** window, do the following (optional):




- **Change Libraries** – click the dropdown arrow to the right of the library displayed to select another library
- **Search** – type a keyword or form acronym in the Search bar to locate a form in the list
- **Filter** – click the menu labeled “All” and choose the forms to display by transaction type
- **Sort** – click the menu labeled “A-Z” to sort the list of forms alphabetically or by form number

4. Click **ADD** next to a form to add that form to your transaction

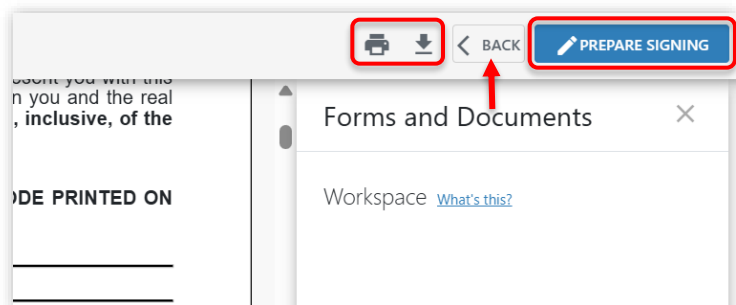
5. Click **CLOSE** at the bottom right to close the window.



6. When finished filling out forms, select one of the following actions:

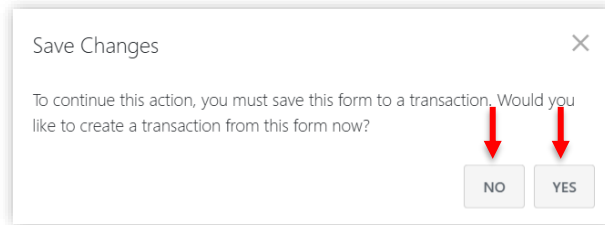
-  = **Print** – select Print from the dropdown menu; *continue to Step 8*
-  = **Download** – select one of the following, *then continue to Step 8*:
 - Single File = all forms combined into one PDF
 - Zip File = compressed zip file
 - Multiple Files = individual PDFs
-  **PREPARE SIGNING** = start a signing packet; *continue to Step 8*

7. Click **BACK** to exit the **Forms** menu *without* saving your work.



8. On the popup window, select one of the following:

- Click to create a new transaction and save your work; *continue to Step 9.*
- Click to if you do not want to create a transaction, and you will lose your work.

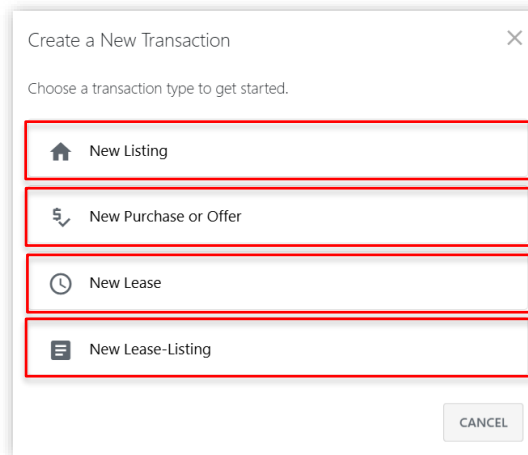


Save Changes ×

To continue this action, you must save this form to a transaction. Would you like to create a transaction from this form now?

Two red arrows point to the NO and YES buttons.

9. If you selected above, choose a transaction type and follow the prompts to create a new transaction.



Create a New Transaction ×

Choose a transaction type to get started.

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-
-
-