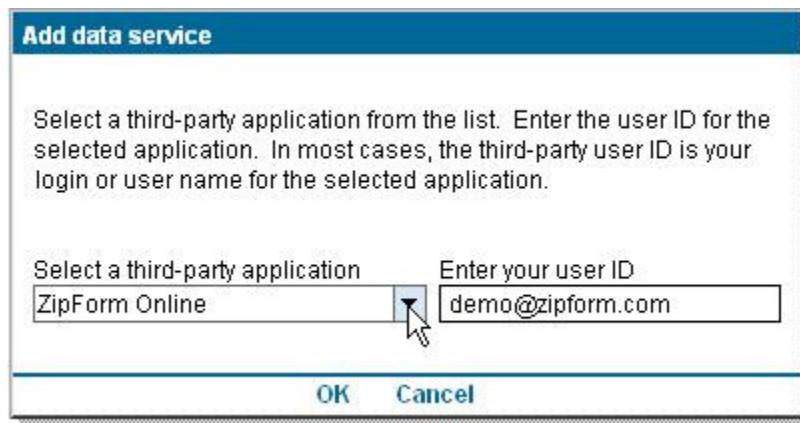


## ZipForm/WinForm Online Setup

Top Producer 7i has been integrated with ZipForm®/WinForm® Online to help those who use both systems save time and increase the accuracy in the completion process of ZipForm®Online transactions.

This service is only available if you have active ZipForm® or WinForm® Online and Top Producer 7i accounts. Before you can actually import data into ZipForm® or WinForm® Online, you must set up your Data Export functionality in your Top Producer 7i account. Please follow these steps:

1. Login to Top Producer 7i.
2. Point to **Setup**, then click on **Data services setup**.
3. In the Data services setup window, click **Add data service**. The dialogue box pictured below will be displayed:



4. Select ZipForm Online in the Select a third-party application drop-down menu, then enter your ZipForm/WinForm Online email address in the Enter your user ID field provided.

**Note:** If you do not know your ZipForm/WinForm Online email address, please click [here](#) for instructions on how to retrieve it.

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## Importing Top Producer 7i Data into a ZipForm/WinForm transaction

The following instructions will walk a ZipForm Online or WinForm Online user through the process of importing Top producer 7i contact data into a transaction.

1. Login to ZipForm/WinForm Online and click on the transaction that you wish to import the Top Producer 7i contact information into.
2. In the drop-down menu to the right of the transaction, select **Partners** to open the Select Partner pop-up window.
3. Click on the **Top Producer** icon in the SelectPartner pop-up window.
4. Enter your Top Producer 7i username in the field provided. Enter the first and/or last name of the contact whose information you wish to import, then click **Search**.
5. A list of Top Producer 7i contacts who match the serach criteria entered in Step 4 will be displayed. Click on the **Select** button beside the desired contact record.
6. **Select** the desired Role in the transaction for the selected contact, then click the **Save In Transaction** button to complete the import. You will receive a message stating that the Contact was imported in transaction as the role that you selected.

7. Repeat steps 1 through 6 for as many Contacts as needed. Once you have finished importing, close the window and open the appropriate transaction to review the imported information.

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#### **Finding your ZipForm/WinForm online User ID**

In order to configure your Top Producer 7i license to send contact data to ZipForm/WinForm online transactions, you will need to follow the instructions located at [at this link](#). One of the required items for configuring Top Producer 7i is the ZipForm user ID, which usually takes the form of an email address. If you are not sure of your ZipForm or WinForm user ID, follow the steps below to verify it:

1. Login to ZipForm/WinForm online.
2. Look in the upper left corner of the ZipForm/WinForm interface to see your user ID. Note the circled user ID in the image below:



3. Take note of this user ID and enter it into Top Producer 7i's Data services setup window, per the instructions located at [at this link](#).