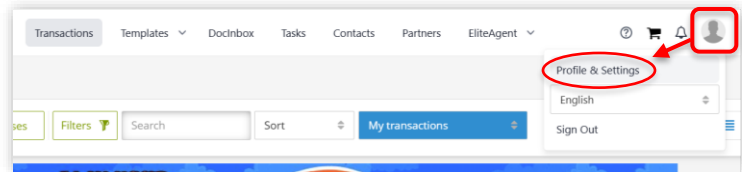


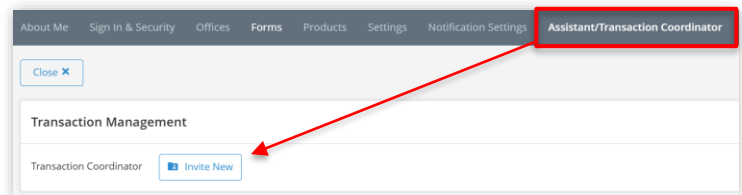
Add a TC or Assistant to work in your zipForm account. Just assign the username and permissions and send the invitation. The TC/Assistant will create their own password and login with their own credentials. You have control over what the TC/Assistant can and can't do inside your account, and their access can be removed at any time.

Assign Username, Permissions and Send the Invitation

1. In your zipForm account, click the photo in the top right corner and select **Profile & Settings** from the menu.



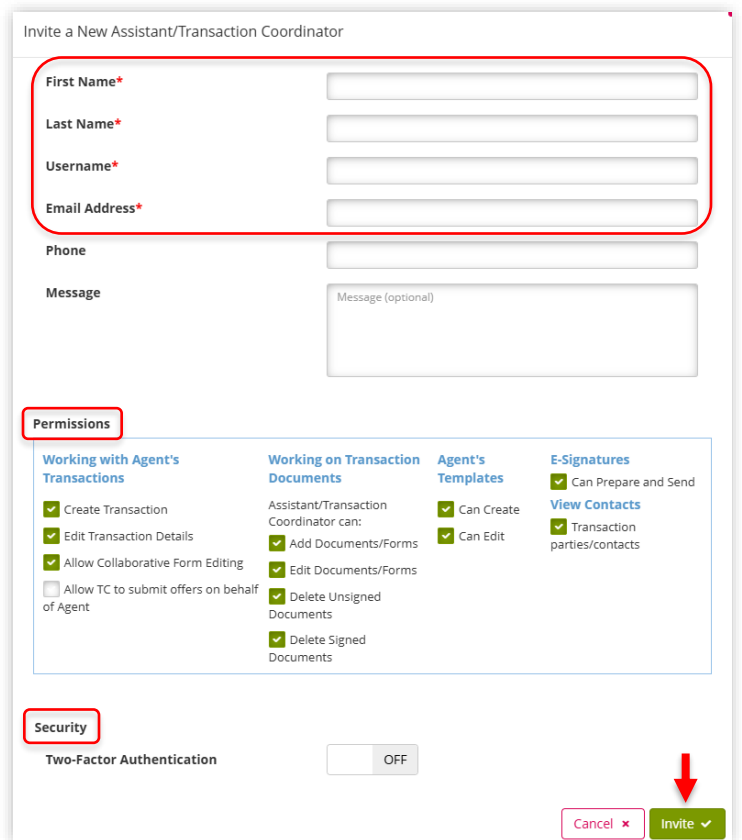
2. Click the **Assistant/Transaction Coordinator** tab in the gray navigation bar.



3. Click .

4. Complete the following fields:

- **First Name** *(required)*
- **Last Name** *(required)*
- **Username** = *(required)* this is commonly their email address.
- **Email Address** *(required)*
- **Phone** *(optional)*
- **Message** = *(optional)* type a message for the email invitation that the TC/Assistant receives.




Permissions

5. Check the boxes for the permissions you'd like the TC/Assistant to have. Uncheck the boxes for permissions you do not want them to have.


Some permissions are pre-selected by default, however, you can change those if desired.

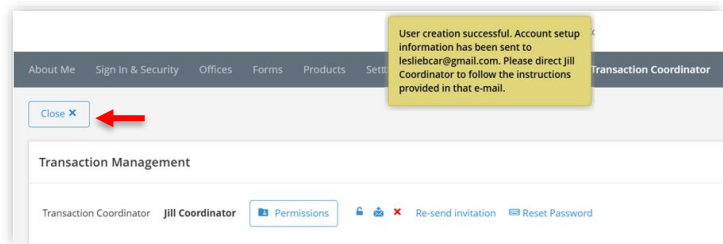
Security

6. *(optional)* **Two-Factor Authentication** requires a unique code sent via email or text to the TC/Assistant each time they login.

7. Click  to send the invitation to the TC/Assistant.

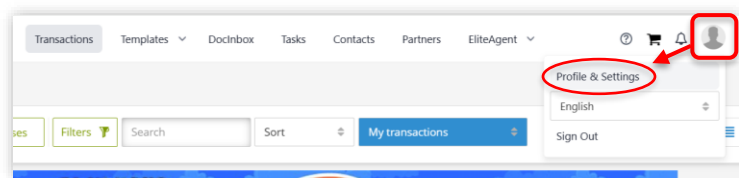
The system will display a notification that the account creation was successful.

8. Click  to close the **Profile & Settings** menu and return to your transactions.









Edit or Remove TC/Assistant Access

1. In your zipForm account, click the photo in the top right corner and select **Profile & Settings** from the menu.



2. Click the **Assistant/Transaction Coordinator** tab in the gray navigation bar.

3. Click to complete the following actions:

-  = edit permissions, turn on/off Two-Factor Authentication
-  = lock the account which disables the TC/Assistant login
-  = send an email to the TC/Assistant
-  = delete the account
-  = automatically resend the account setup invitation
-  = automatically send a password reset link

4. When finished, click  at the top left to close the **Profile & Settings** menu.

