

# For Administrators: Zip Setup and Training

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# Housekeeping

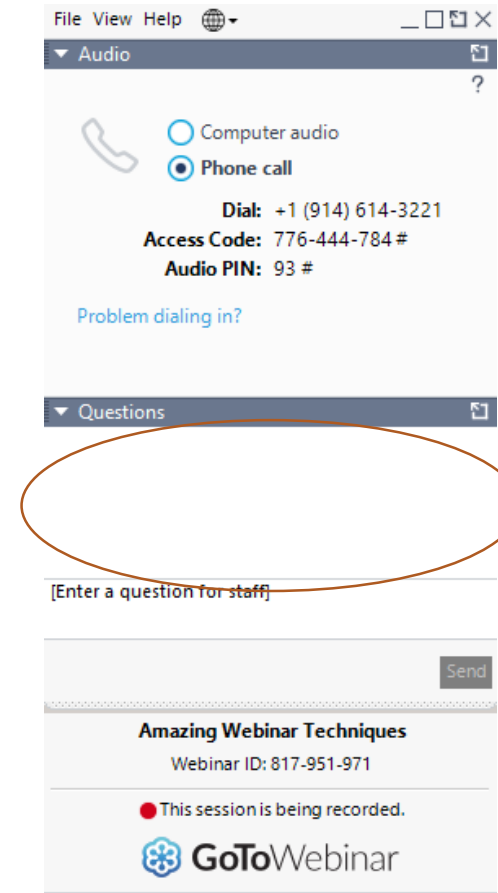
Type questions into the Questions box

Handouts are available for download

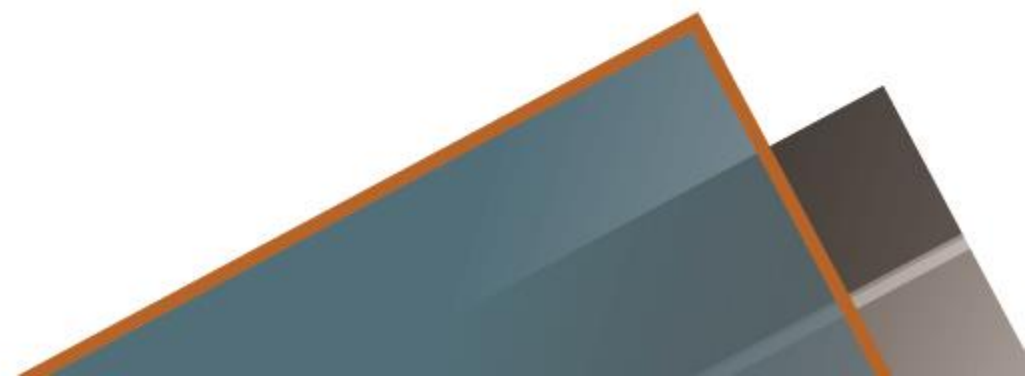
Technical Difficulties

GoToMeeting Support Line

888-259-8414



# Agenda

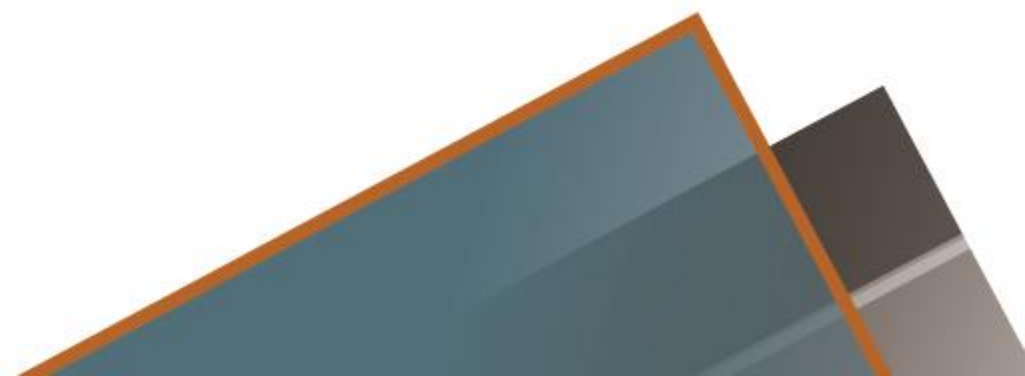
- Migrating from individual accounts to a single company-wide account
  - Setting Company Defaults
  - Adding New Users and Access Rights
  - Editing User Information
  - Connecting to Point
- 

# Presenter

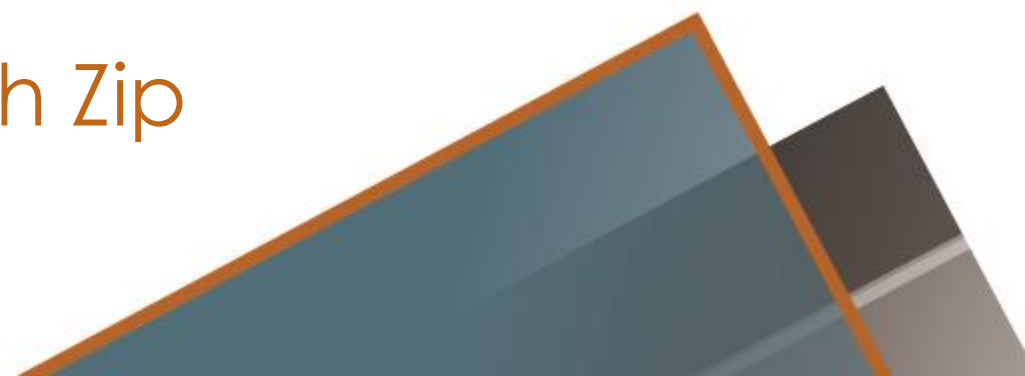
*Meghan Stinnett*  
*PSG | Online Specialist*

- Digital Marketing Degree
  - Web Design Certification
  - Extensive Technical Support Expertise
  - Consultant
  - Calyx Software
    - Knowledge Base Administrator
    - Zip Team Lead
    - Professional Services Consultant
- 

# Walk Through

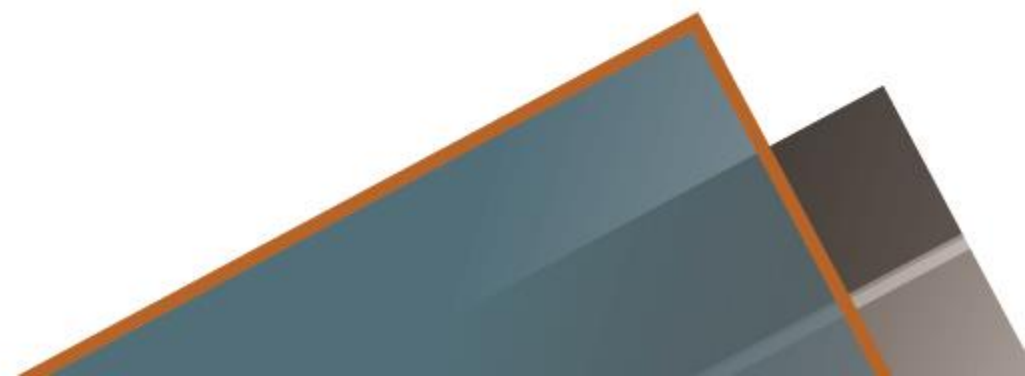


# FAQs


- Doc Request is FREE
  - You must have a Zip account to enable Doc Request and INK-it
  - You can use Doc Request for loan files that **have not** been submitted through Zip
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# FAQs – Training Classes

- Live training [CalyxSoftware.com](https://CalyxSoftware.com) > Training > Live [Webinars](#)
- Recorded Training [CalyxSoftware.com](https://CalyxSoftware.com) > Training > [Free Classes](#)



# FAQs – Knowledge Base Articles

- Zip/Point Integration [1139 Setting the Zip Preferences](#)
  - Setting Zip Company Defaults [7003 Setting your Company Defaults for Zip](#)
  - Adding New Users to Zip [7004 Adding new Users to your Admin Zip account](#)
  - Updating Zip User Information [7005 Updating User information for Zip](#)
  - Doc Request [7001 Requesting borrower documents with Zip](#)
- 

# Contact Us

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