

# Paperless Transactions

A quick start guide for real estate professionals using zipLogix online programs



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[www.ziplogix.com](http://www.ziplogix.com)

Sign In: [www.zipFormPlus.com](http://www.zipFormPlus.com)



The zipForm® Quick Tools are easy to understand buttons. Here are some tools to get you started. Hover your mouse over a tool to magnify the tool and its description in zipForm® Plus.

## Home Page



**Forms** – Opens the forms editing. Shortcut to opening and filling out a form without starting a new transaction file.



**New** – Start a new file to store forms and documents.



**Clauses**– Save or manage text (Clauses) so that the text (Clauses) can be inserted into forms when appropriate. Legal and brokerage mandated text are commonly added as clauses. Use a clause by clicking on a field inside a form, and then clicking the Clauses button.



**Lookup Manager** – Edit the text that is used for the drop-down Lookup Fields.



**List View** – Switch to viewing a list of the transaction files, documents, or contacts (zipForm® Plus will remember your preference).

## Forms Page



**Fullscreen** – View the form full screen (removing the All Forms and My Forms tabs, along with all zipForm® Plus menus, except the forms editor buttons)



– When in full screen mode, this button will return you to your regular form view



**Save** – Click to save your changes (Tip: the save button is only blue when you have unsaved changes. It will be gray if all changes have saved)



**Send** – Fax or email forms and/or documents to any fax number or email address



**Print** – Print this form, or select forms to print



**Apply template** – Add a template (a saved packet of forms) to this file



**Save as PDF** – Download a copy of selected forms from this file as a locked PDF document



**eSign** – Click to prepare documents to be sent for signatures using zipLogix Digital Ink® or DocuSign®



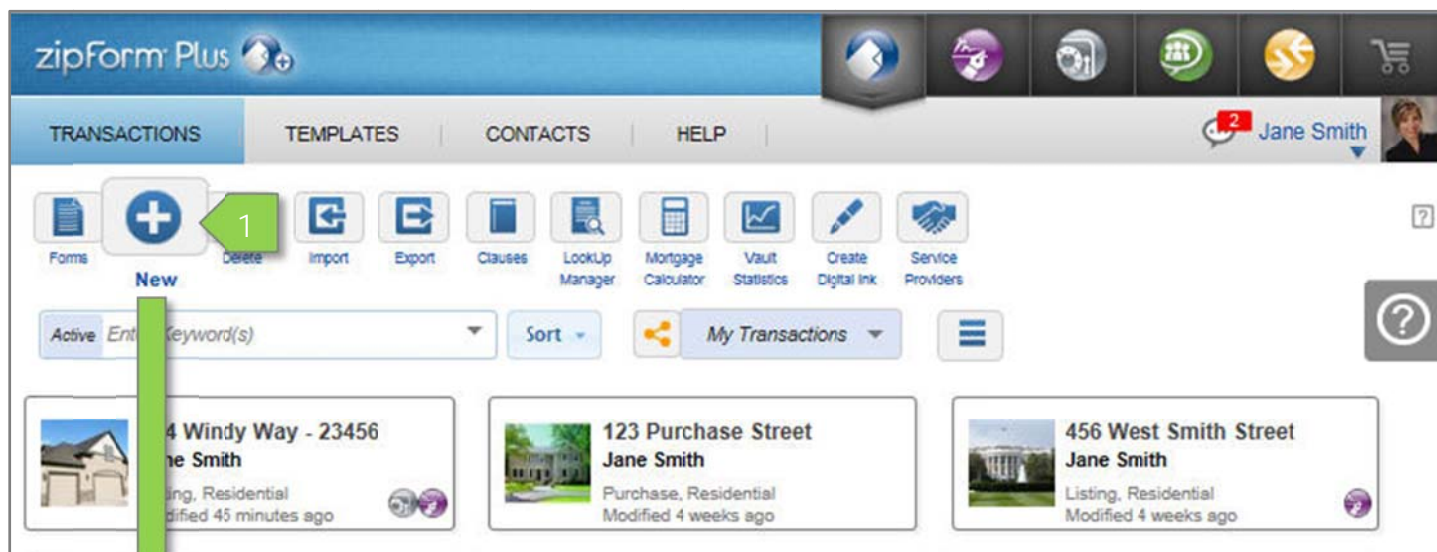
**Fast Fill** – Click to see all of the form fields within the displayed form

# Starting a transaction file in zipForm® Plus



A seamless online transaction starts in zipForm® Plus, your central location for professional real estate files and contracts. Sign in at [www.zipformplus.com](http://www.zipformplus.com)

The transaction file is a set of contracts (zipForm® forms, contracts signed using zipLogix Digital Ink®, and uploaded documents in zipVault®) for a specific client or property. Transaction information, including Transaction Parties and Property Information, automatically flows from form to form as each contract is completed or updated within zipForm®.



Transaction Details

Name: 987 Main Street

**Transaction Type**

☒ Listing

☐ Purchase

☐ Lease

**Property Type**

☒ Residential ☐ Commercial

☐ Industrial ☐ VacantLand

☐ MultiUnit

Office Address: zipLogix Firm

Apply Template: [Dropdown menu open showing options: New Listing Packet, New Listing Template, New Template, New Training Template, Purchase Agreement Counter Offer Template, Purchase Agreement Template, Sales Packet, Sales Packet - CDavis]

Add Photo

Save Close

## Start a Transaction

1. Click the **New** button on the **TRANSACTIONS** page
2. Enter the **property address** to name the file

*Tip: You can later search for files by name, address, client's name, and more using the "Enter Keyword(s)" field on your Transactions page*

3. Select the appropriate **template** (forms packet) to start the file

*Tip: This template will add key required forms to the file. If you do not see the Templates option, you do not have any templates available. Create master templates on the TEMPLATES page.*

4. Click **Save**

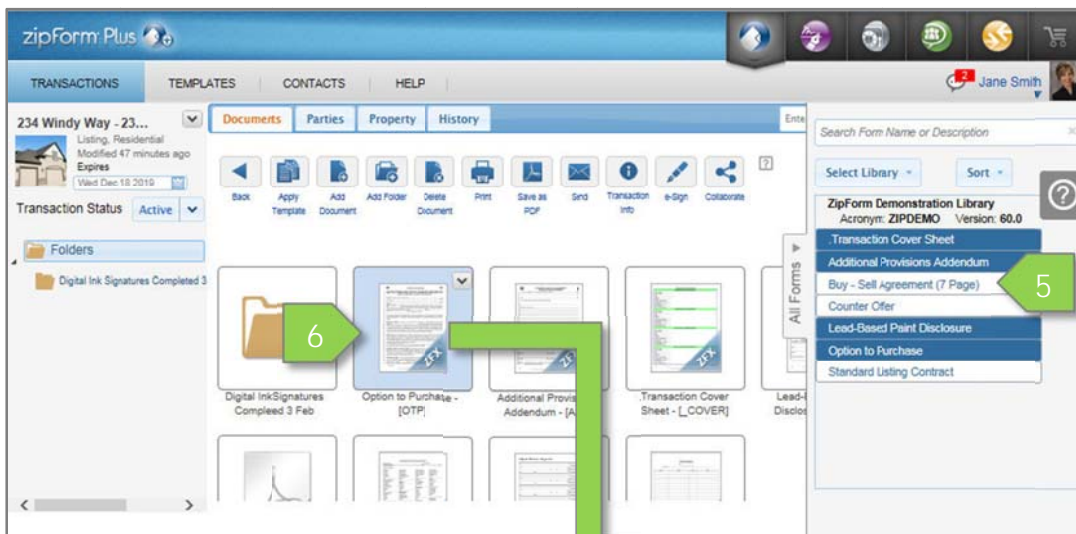
# Adding and completing contracts in zipForm® Plus



## zipForm® Forms

- Click a form name in the All Forms tab to add it
- Click a form to open it and fill it out
- Click and type to fill out form fields
- Click Save
- Send contracts to participants for signatures using the eSign button.

*Tip: Use the Email, Print, Collaborate or Save as PDF buttons to share forms with others outside of using eSign, or share your screen with a client using the free zipConsult™ tool (the round green button at the top of the page) at any time*



**OPTION TO PURCHASE**

1 This contract stipulates the terms of an option to purchase property. Read carefully before signing. This is a legally binding contract. If not understood, seek competent advice. This Option is not valid without the attached Buy-Sell Agreement.

2 Parties: The parties to this Option are John Smith of 234 Windy Way, City, ST 12345 (address)

3 (Seller) and Jane Doe of \_\_\_\_\_ (address)

4 (Buyer)

5 Full Name of First BUYER, TENANT or SUBTENANT Jane Doe

6 Full Name of Second BUYER, TENANT or SUBTENANT \_\_\_\_\_

7 Total character amount for both Buyers names cannot exceed 60 characters

8 Buyer hereby acknowledges, is, the exclusive option to purchase the property of County, State of City, which is legally described as: 234 Windy Way

9 The property, subject of this Option (both real and personal) is more fully described in the attached Buy-Sell Agreement. The Option Money ☒ is ☐ is not to be applied to the purchase price upon closing.

10 Exercise of Option: The Buyer may exercise this Option at any time following its entry until midnight on November 17, 2016. To exercise this Option the Buyer shall deliver written notice of exercise in manner as set out in the Notice section below and the earnest money in the amount and manner as described in the attached Buy-Sell Agreement. Any exercise that fails to comply with the terms of this Option shall be void. All option money shall be paid directly to the seller and shall be non-refundable. If this Option is not exercised by the Buyer within the time stated, it shall expire and all monies paid to acquire it shall remain the property of the Seller.

11 Notice: Notice of the exercise of this Option may either (1) be sent by certified mail to the Seller





Complete eSign integration with zipLogix Digital Ink® makes it easy to create professional, accurate signing packets for any transaction file.

The top screenshot shows the zipForm Plus interface with the 'e-Sign' button highlighted in the transaction toolbar. The bottom screenshot shows the 'Select Documents to Sign' screen with numbered steps: 2 (Name your e-signature submission), 3 (Select documents to sign), 4 (Browse for additional documents), and 5 (Click Next).



Signing documents with zipLogix Digital Ink® creates a complete, verifiable signed document which cannot be altered after signing. With a fully integrated digital signing experience, it is easier than ever to bring the security and convenience of digital signatures to the closing table.

## Select Documents to Sign

1. Click **eSign** within the zipForm® Plus Transaction file, or when filling out a zipForm® Plus form.
2. (Optional) Enter a **name** to identify this packet of documents that is being sent for signatures.
3. Click the **check box** for documents and forms to add them to the list of **Documents to sign**.
4. (Optional) Click **Browse** to add additional PDF documents from your computer.
5. Click **Next**.



## Select Signers

6. Click to check the **check box** next to signers
7. Enter **required** information for signers, such as email address or role (what signature fields they will be prompted to complete)
8. Click **Done**
9. (Optional) Click and drag to change the **signing order**. Drag one signer on top of another to have them sign at the same time.
10. (Optional) Select signer options, such as the automatic **CC** to automatically deliver signed contracts via email from the system once signing is complete.
11. Click **Next**

	First Name*	Middle Name	Last Name*	Role*	Email*	Company
<input checked="" type="checkbox"/>	Jane		Smith	Listing Agent	training@ziplogix.com	
<input checked="" type="checkbox"/>	Sally		Doe	Buyer One	sally@email.com	
<input checked="" type="checkbox"/>	Kevin		Jones	Seler One	kjones@email.com	
<input checked="" type="checkbox"/>			Doe	Buyer Two	adoe@email.com	
<input type="checkbox"/>				Seler Two		
<input type="checkbox"/>	Carol		Agent	Selling Agent		

\* - this information is required.

Order	Role	Name	Email	CC	Text Message Authentication(\$)*	Verify ID (\$)*
1	Listing Agent	Cassandra Davis	training@ziplogix.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Seller One	John Smith	jsmith@email.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Selling Agent	Carol Agent	cagent@email.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Buyer One	Jane Doe	jane@email.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Buyer Two	Alex Doe	adoe@email.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Add Tasks

12. Signing tasks will allow signers to execute the contract. Click and drag an icon to add a **signature** or **task**, if needed.
13. The signatures will show a **preview** of a sample signature, to help with sizing the signature areas.
14. Review the tasks on all documents on the **Document List**.
15. Click **Send**

Document List: Lead-Based Paint Disclosure

Buyer has received copies of all information listed in item (b), if any.

Buyer has received the pamphlet "Protect Your Family From Lead in Your Home."

Buyer has (check one below):

☒ Received a 10 business day opportunity (or other mutually agreed upon period) to conduct a risk assessment or inspection of the presence of lead-based paint hazards (in which event the parties have entered a Lead-Based Paint Contingency Addendum);

opportunity to conduct a risk assessment or inspection for the presence of lead-based paint hazards.

The Seller Broker/Salesperson (or if no listing Broker/Salesperson, any agent) has informed the Seller of the Seller's obligations under 42 U.S.C. §4852(d) regarding the information above and certify, to the best of their knowledge, that the information is accurate.

Signature Preview: Jane Doe

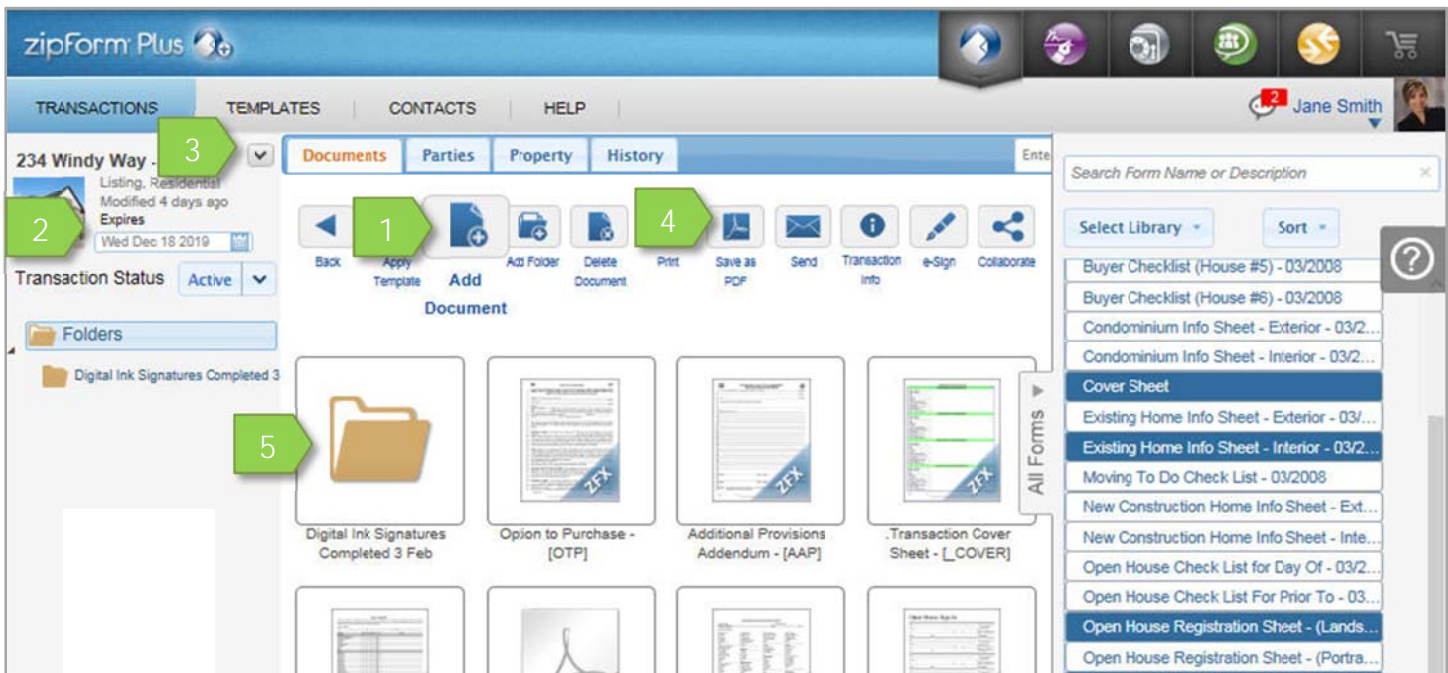
Signature Preview: Alex Doe

# Storing files using zipVault®



zipVault® makes it easy to store documents and files securely online within your zipForm® Plus account. With document storage and online file retention built seamlessly into zipForm® Plus, using zipVault® means saving time and money.

Adding a document to zipVault® activates extended storage for the file, with an expiration date that can be controlled, so agents and brokerages can easily and securely store files online.



## zipVault® Online Storage

1. Click **Add Document (1)** to upload a file from your computer. As soon as the first document is added, zipVault® extended file storage is activated for the transaction.
2. The transaction file will be available on zipForm® Plus until it is deleted by you, or until the **Expiration Date (2)** (whichever comes first). Click the calendar button next to the expiration date to choose a different date.
3. Documents can also be added using the **Email to zipForm®** or **Fax Coversheet** features on the **File Menu (3)**.
4. Unsigned forms can be preserved as part of the file for sharing or documentation using the **Save as PDF (4)** button, and saving selected forms to the file.
5. Signed forms sent using the e-Sign button, or signed on a tablet with TouchSign®, are added automatically to a new **Signed Folder (5)**, once signing is completed by all parties.

Documents stored online in zipForm® Plus using zipVault® can be emailed, faxed, included in eSign packets alongside forms, or shared online using the Collaborate button in zipForm® Plus.

Send documents in to zipVault®, or ask someone else to send you documents. Documents can be emailed to a transaction as email attachments using **Email to transaction**, or can be faxed from any fax machine by following the faxing instructions on the **Fax cover sheet**. Both options can be found under the advanced **File Menu (3)**.

**Email to transaction**

**Fax cover sheet**

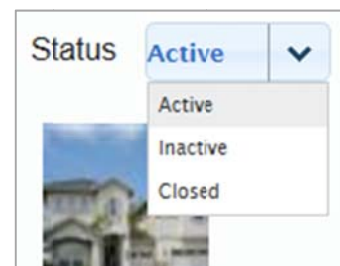




Manage and archive stored online transactions using zipForm® Plus and zipVault®. Your TRANSACTIONS page contains powerful tools to sort files, track online storage, and quickly find the transaction you need.

Mark a file as closed or inactive to continue storing that file online without cluttering your list of active transactions.

1. Click the **property photo** to edit transaction details
2. Change the transaction Status to **Inactive** or **Closed**
3. Click **Save**



Inactive and closed transactions will not appear on your main TRANSACTIONS page by default. Search for Inactive, Closed, or All files by clicking the arrow on the search (Enter Keyword(s)) field on the TRANSACTIONS page, and selecting to search for Closed, Inactive, or All files.

The screenshot shows the zipForm Plus interface. At the top, there's a navigation bar with 'TRANSACTIONS', 'TEMPLATES', 'CONTACTS', 'HELP', and 'FEEDBACK'. Below this is a toolbar with icons for Forms, New, Delete, Import, Export, and a 'Classes' dropdown (callout 3). Further right are icons for LookUp Manager, Mortgage Calculator, Vault Statistics, Create Digital Ink, Service Providers, and Net Sheets. A search bar labeled 'Active Enter Keyword(s)' has a dropdown arrow (callout 7). Next to it is a 'Sort' button and a view toggle button (callout 1). The main table lists transactions with columns: Transaction Name, Status, Seller, Buyer, Prop Address, Modified, Created, and Expires. The second row is highlighted. Callout 6 points to the 'Transaction Name' column. Callout 2 points to the 'Expires' column. Callout 4 points to a zipVault icon in the 'Expires' column. Callout 5 points to a zipVault icon in the top right corner of the interface.

Transaction Name	Status	Seller	Buyer	Prop Address	Modified	Created	Expires
234 Main Street - 234567	Active	Jane Seller		234 Main Street, City ST	17 hours ago	3 weeks ago	Wed Jan 16 2019
123 Signa Way	Active	Adam Seller, Betty Seler	Smith Investments, LLC,	123 W Hillside Avenue, Prescott ST	17 hours ago	Thu -	Thu Oct 29 2015
234 Main Street - 234456	Active	Adam Seller		234 Main Street, City ST	20 hours ago	3 weeks ago	Thu Jan 17 2019
456 New Listing Way	Active	N/A N/A		No Address	21 hours ago	21 hours ago	Wed Feb 5 2019

## Transaction Storage

1. Click the **Icon View/List View Button (1)** located next to your sort options to change your viewing preference for this page and see more details using **List View**. zipForm® will remember this preference until you change it again.
2. List view makes it easy to see the **Expiration Date (2)** for all files, to know how long your files will be stored online.
3. Files can be **exported (3)** to download all or part of the file for offline storage. Files stored offline can be imported back to zipForm® Plus when needed.
4. Files with the **zipVault® icon (4)** contain documents stored in zipVault®.
5. Click the **zipVault® product button (5)** at the top of zipForm® Plus to sort by zipVault® transactions.
6. Click the **File Name (6)** to open the file and view or change the expiration date for a file.
7. Manage more than just active real estate transactions. Search for **Inactive, Closed**, or view **All** files using the transaction search **Filter by Status (7)** option.



# Tips: Personalize Your Communication



Emails sent from zipForm® Plus include your photograph and email signature, which can be added through your profile, and a property photo, which can be added to the file by clicking on the photo on the property folder.

## Your Picture and Signature

A personal profile image and email signature can be added through the **About Me** section of the zipForm® Plus Profile. Enter updates and click **Save**.

## Add Property Image

A property image can be added when creating or modifying Transaction Details.

Click the **property image** placeholder to open Transaction Details and add a Photo from your computer.

# Tips: Set up your account in zipForm® Plus



There are many ways to customize your new zipForm® Plus account. Here are some tips and tricks to make your life easier.

2 \_\_\_\_\_  
3 \_\_\_\_\_ John Smith  
4 \_\_\_\_\_  
5 and \_\_\_\_\_ George Smith  
6 \_\_\_\_\_  
7 and concerning the following described property:  
8 \_\_\_\_\_  
9 \_\_\_\_\_  
10 \_\_\_\_\_  
11 \_\_\_\_\_  
12 Additional provisions:  
13 \_\_\_\_\_  
14 \_\_\_\_\_  
15 \_\_\_\_\_

Insert Clause

Abc abc ABC

## Tip 1: Save clauses and use them in text fields

Common paragraphs, sentences or phrases can be saved and inserted into form fields quickly. Create and save clauses by using the Clauses button on the Transactions page, and then insert a clause using the Insert Clause button within a text field on a form.

To reach the **Insert Clause** button, click on a form field. Click the gray pencil button to open the insert clause and change case buttons.

## Tip 2: Enable 15 minute Autosave

While you are working in your forms, zipForm® Plus saves your file automatically every time you move to a different form, add a form, remove a form, email, print, or send for signatures. However, sometimes it helps to have just a little more peace of mind.

Set Autosave from the **Settings** section of your **Profile** to save files every fifteen minutes for added security.

About Me  
Libraries  
Settings  
Shop

General Options

Use Template Data

Active Field Color

Active Text Color

Field Background

Highlight Color

Time Interval for Autosave Transaction (mins.): 15

Mortgage Calculator Default Interest Rate 3.5

Profile

Jane Smith  
odavis@ziplogix.com  
zipLogix Acme Realty Firm  
18070 15 Mile Road  
Fraser, MI 48026

View Profile Shop Sign Out

Autosave

About Me  
Libraries  
Settings

Form Libraries

Organize Close

Name Description

ZIPDEMO ZipForm Demonstration Library

OPENH Open House Forms

Organize

## Tip 3: Sort your form libraries

Use the **Libraries** section of your profile to organize, or rearrange the order of form libraries to reflect which library appears by default and the order for libraries in your form libraries page.

## Tip 4: Create a Template

**Templates** are saved packets of forms, contacts, and documents that you can use when starting your transaction file through the **Apply Template** option when creating or editing a zipForm® Plus transaction file. Click **TEMPLATES** and then click **New** to create your own template.

Creating a template is similar to creating a Transaction. Name your template, add forms, and fill out key information, such as your brokerage name and address. Save your template and you can use it on future transactions by using **Apply Template**.

zipForm Plus

TRANSACTIONS TEMPLATES CONTACTS HELP

New

All Enter Keyword(s) Sort

Templates are time saving tools that you can use to create transactions quickly with commonly used forms and information. Learn more

Purchase Template  
Purchase, Residential  
Modified 4 weeks ago

Listing Template  
Listing, Residential  
Modified Wed Jan 07 2015

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