Paperless Transactions

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

Complete contracts quickly and professionally	Get secure paperless signatures using eSign	Continue working with and storing forms, documents, and archives online

zipForm Plus

zipLogix digital Ink®

zipVault®

Contents

www.zipLogix.com

Sign In: 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

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®.
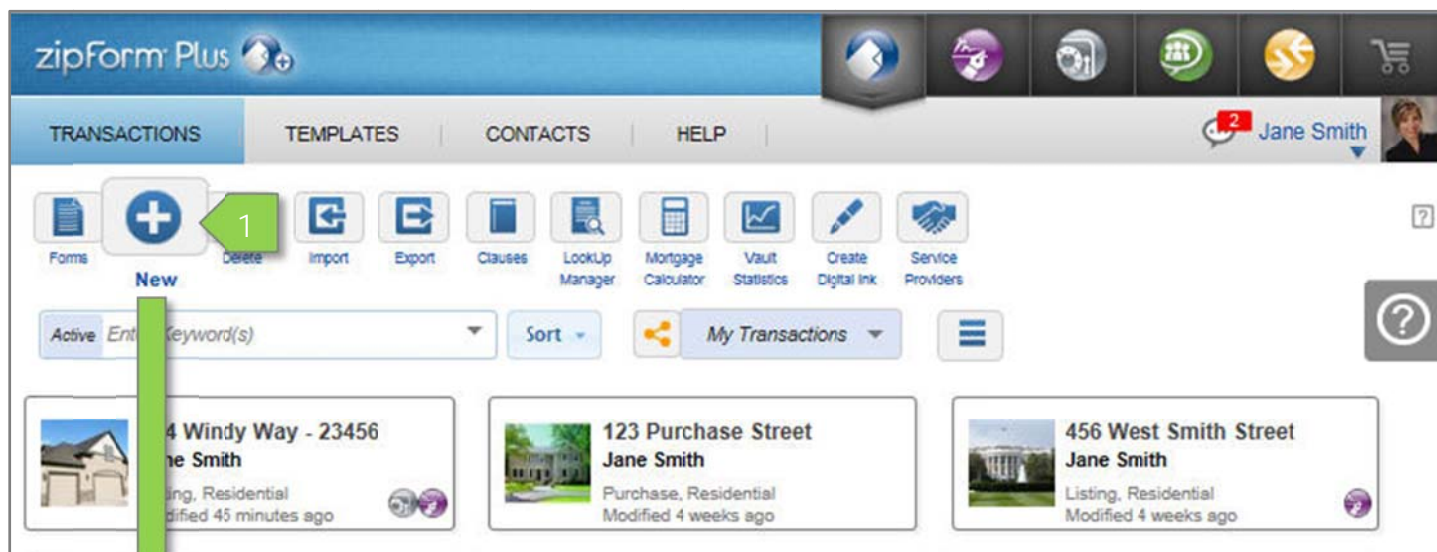
Start a Transaction

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.
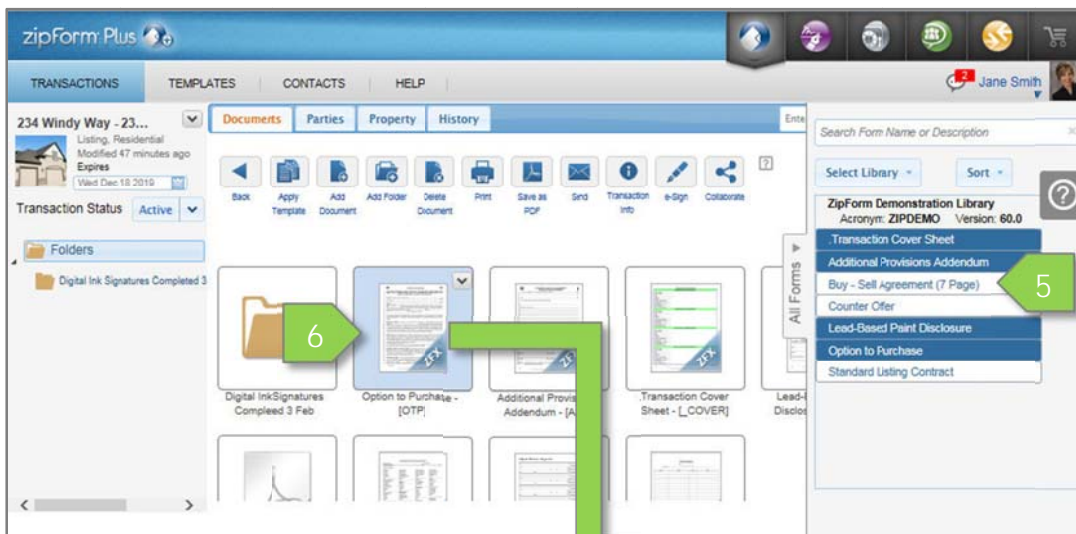
4. Click **Save**

Paperless Transactions   www.ziplogix.com   Page 3

zipForm® Forms

5. Click a form name in the All Forms tab to add it
6. Click a form to open it and fill it out
7. Click and type to fill out **form fields**
8. Click Save
9. 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*

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

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**

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**

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.
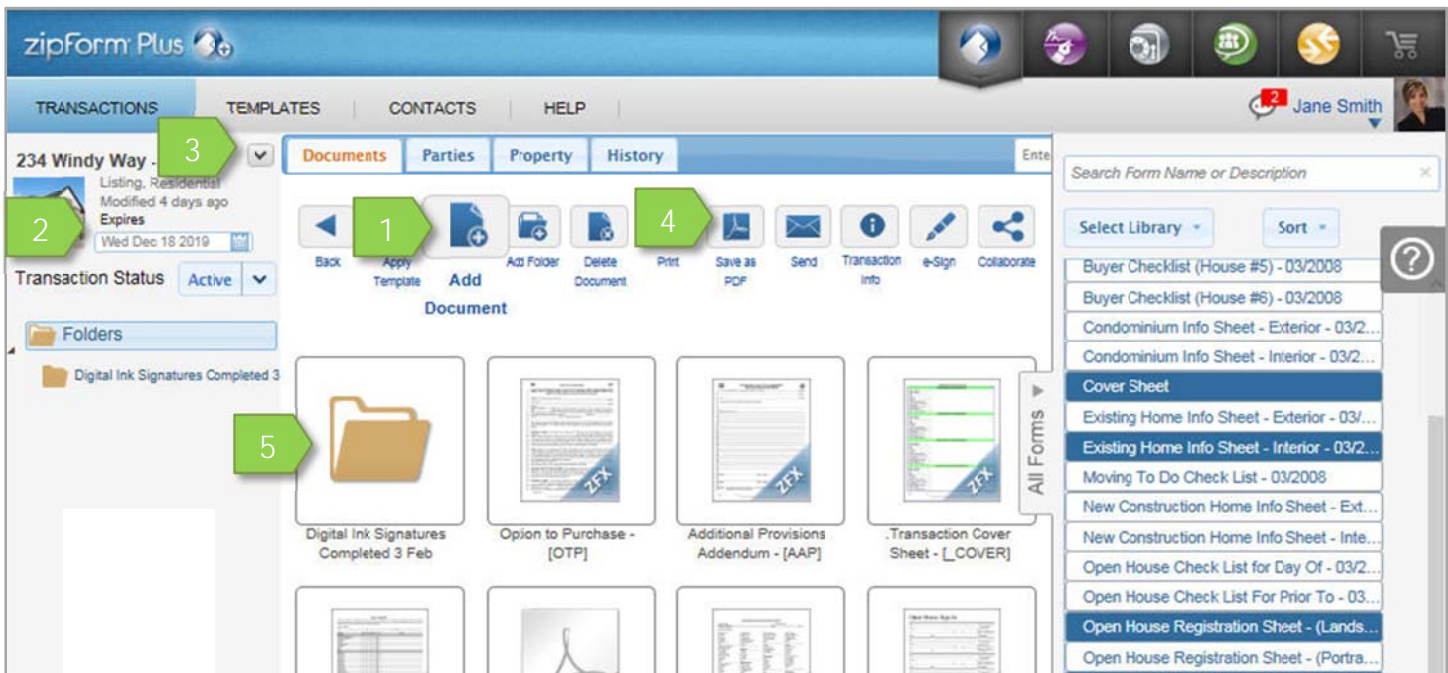
zipVault® Online Storage

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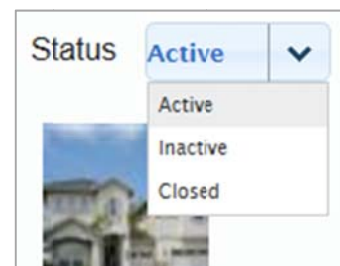
Inactive and closed transactions will not appear on your main TRANSACTIONS page by default. Search for Inactive, Closed, or All files by clicking the arrow on the search (Enter Keywords) field on the TRANSACTIONS page, and selecting to search for Closed, Inactive, or All files.

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.

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**.

Profile

Sent From Cassandra Davis
456 Main Street - John Smith - #23456

Cassandra Davis has sent you a document(s) from zipForm® Plus

Good Morning!
Can you please review the attached documents before today's 1 pm meeting?
Thanks!
Sincerely,
Cassandra Davis
Acme Realty
www.zipLogix.com

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.

Add Photo

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

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.

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**.