

# Completing Contracts Online

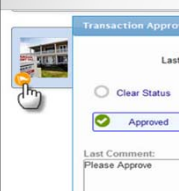
Getting started using zipForm® Plus to complete contracts online quickly and efficiently



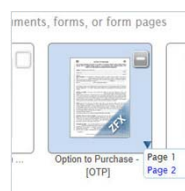
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## The zipLogix Advantage

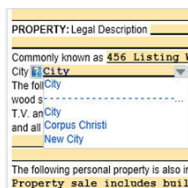


Seamless professional workflow

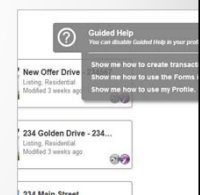


Easy to use

Reduced data entry



Always accurate, secure, and up to date



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## The Paperless Transaction



zipForm Plus 

ziplogix  
digital Ink 

zipVault 

Together, these tools help you seamlessly meet your office and client needs from anywhere, at any time.



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## Getting Started: A New Client

Congratulations! You are on your way to present to a prospective client.  
*How do you make a great first impression?*

- ✓ **Professionalism** – Electronic forms in zipForm®, complete with your information, and your future client's information can be prepared and ready in just minutes
- ✓ **Accuracy** – Enter information once, or import it from the MLS, and all of your forms update automatically
- ✓ **Expertise** – You always have secure access – from your computer, smartphone\* or tablet\* – to your files and real estate contracts
- ✓ **Trust** – Forms in zipForm® are provided by your association, brokerage, or MLS, are always secure, and always update to the latest version

*\* With zipForm® Mobile*



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## Sign in

**ProTip:** Use CTRL + D to bookmark [zipFormPlus.com](http://zipFormPlus.com) on your browser of choice (CMD + D on an Apple Computer)

1. Visit [www.zipformplus.com](http://www.zipformplus.com)
2. Enter your **username** and **password**

USERNAME

PASSWORD

Sign In

[Forgot Username](#) | [Forgot Password](#)

- If you do not have an account, you can sign up at [www.ziplogix.com](http://www.ziplogix.com) using the **Order Now** button
- **Sign in from anywhere** on any Apple (Mac) or Windows (PC) computer using Internet Explorer (PC), Firefox, Safari (Mac), or Chrome browser
- Add **zipForm® Mobile** to your account for access through any smartphone or tablet browser



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## The TRANSACTIONS Page

Your active transaction files, with the forms, documents, and tools to close the real estate sale.

zipForm Plus

TRANSACTIONS | TEMPLATES | CONTACTS | HELP

Jane Smith

Forms New Delete Import Export Clauses Lookup Manager Mortgage Calculator Vault Statistics Create Digital Link Service Providers Tools

Search Enter Keyword(s) Sort My Transactions List View Training ?

234 Main Street - 234567  
Jane Smith  
Listing, Residential  
Modified 24 minutes ago

Purchase - Single famil...  
Jane Smith  
Listing, Residential  
Modified 21 hours ago

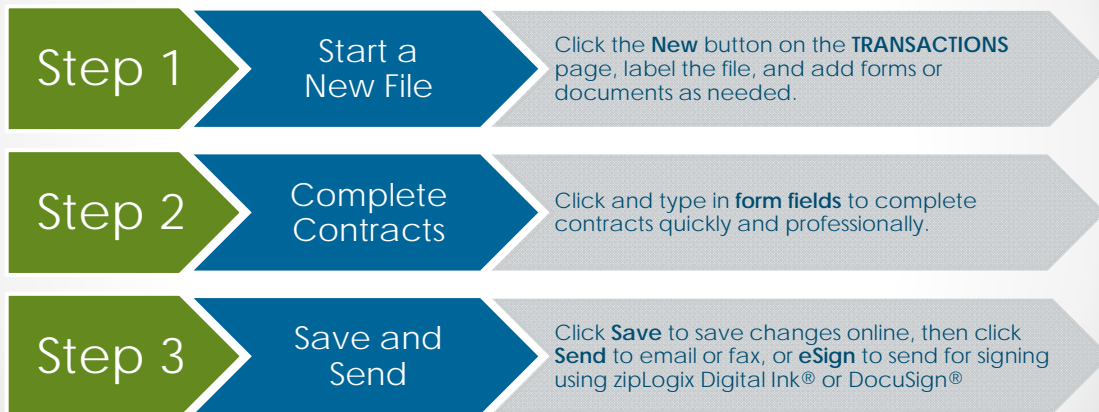
Transaction



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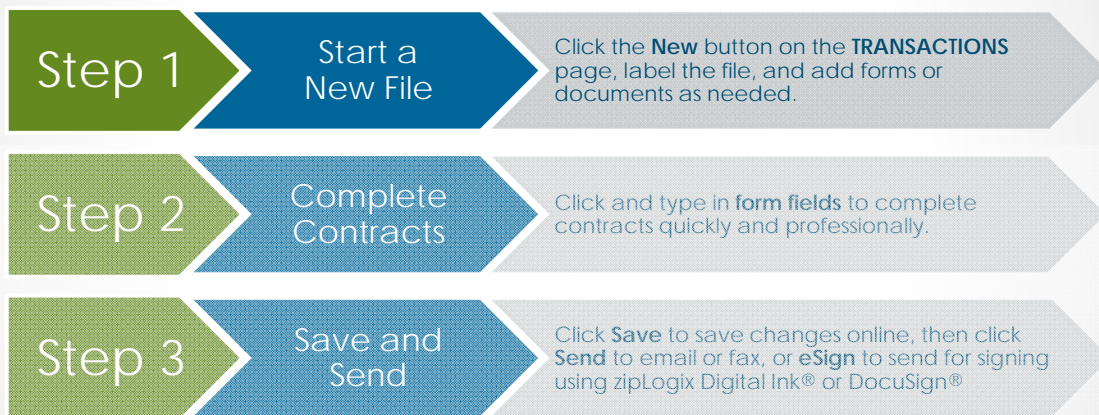
## Getting Started in zipForm® Plus



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## Getting Started in zipForm® Plus



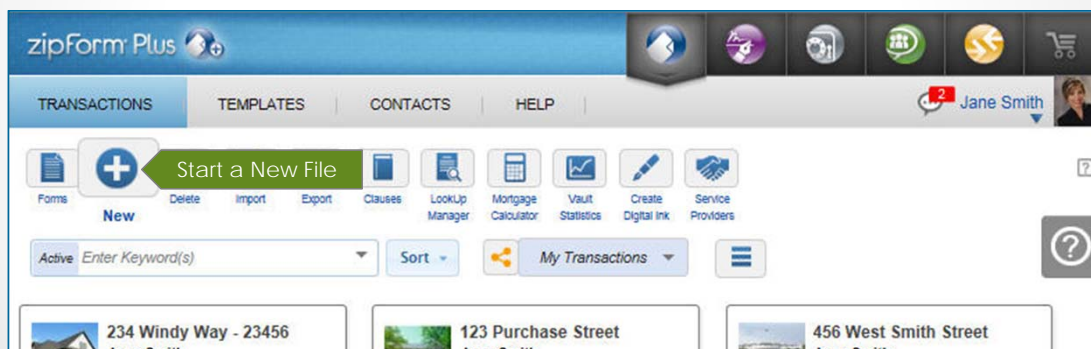
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# Start Your New File

Click the **"New"** button on your **TRANSACTIONS** page

*This creates a virtual Transaction File that you can use to complete contracts for this property and client.*



# Name the File

The **Name** helps you find this file later

- Search by file Name using the "Enter Keywords" box on the TRANSACTIONS page
  - This also searches the property address and client name in the forms
- The **Name** also prints in the lower right-hand corner of the forms in this file
- Client names or property addresses are commonly used

## Select a Template *(Optional)*

**Templates** are saved packets of forms, contacts, and documents

- *Templates are not required to start a file, but they can save you time by automatically adding forms, contacts, and documents*
- *Templates can be created by your broker or office Admin in the Broker Edition*
- *Templates can be created by you from the "TEMPLATES" page*



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## Click "Save"

This creates the new file

- *You now have a place to organize, store, and update all of the real estate contracts and other related documents for your future client*



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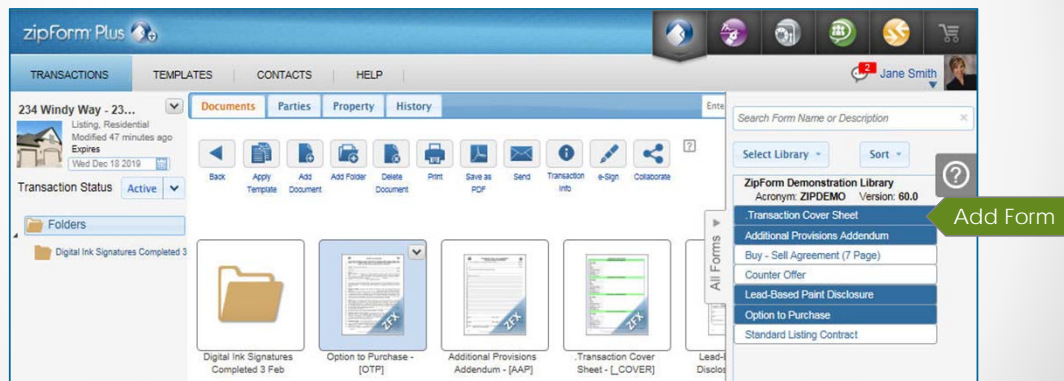
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# Documents - Adding Forms

Click once on a form in the "All Forms" tab to add it

- o TIP: Add the Cover\_Sheet form to use as a shortcut for completing forms



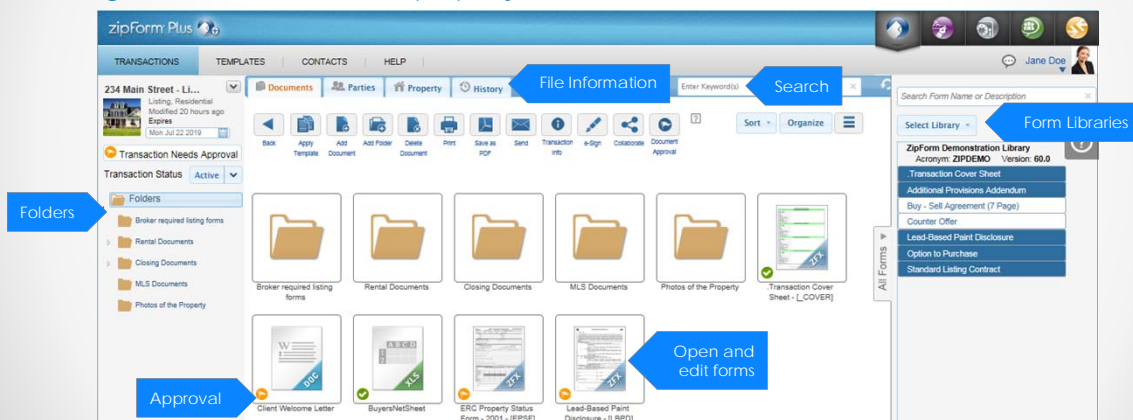
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## Summary

# Your Transaction File

Use this file in order to update contracts, add to the transaction, share with anyone, and manage file information for the property sale



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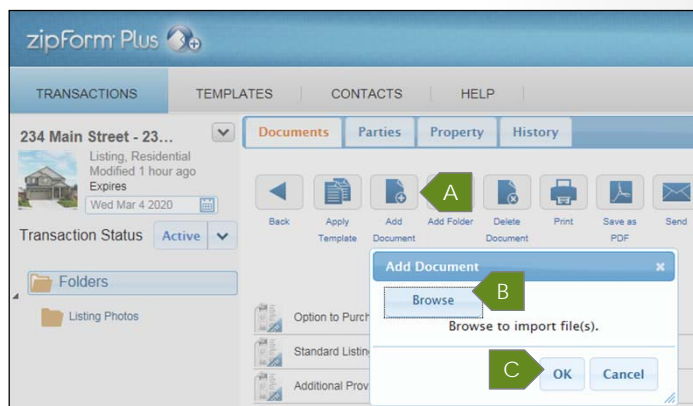
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## Shortcuts

# Saving and Storing Files Online

Use the **Add Document** button to add computer files, like PDFs

- A. Click **Add Document**
- B. **Browse** for the file on your computer
- C. Click **OK**



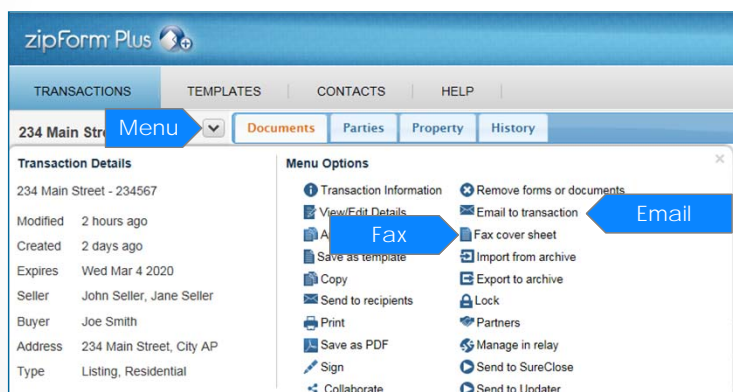
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## Shortcuts

# eMail or Fax in Documents

Use the **eMail to Transaction** or **Fax Coversheet** options in the file **Menu** to send an email attachment or a fax to zipVault®



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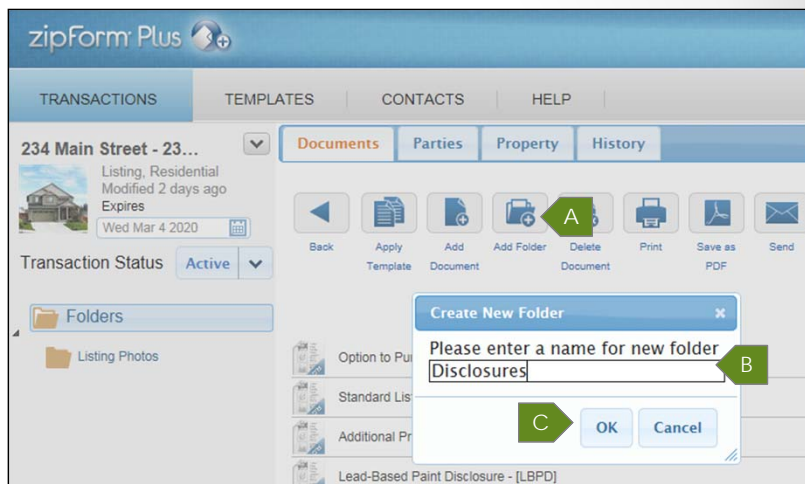
## Shortcuts

## Add Folders to Organize Files

Folders group together related documents and forms within a zipForm® Transaction.

- Click **Add Folder**
- Enter a **name** for the new folder
- Click **OK**

Click and drag forms or documents from the Documents List to the folder in order to add them to the folder.


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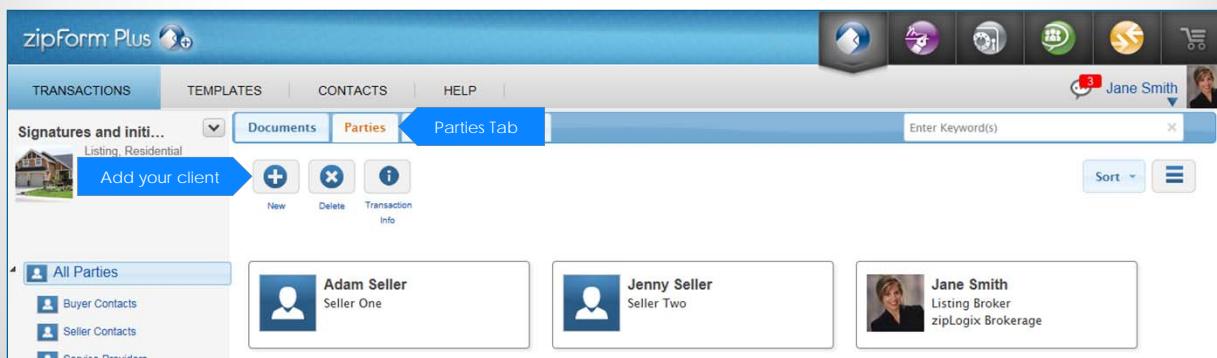
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## Shortcuts

## Parties Tab

**ProTip:** Enter email addresses for transaction contacts, so that you won't have to look them up or type them in later when sending documents.

The parties tab is an easy place to update and store information on the transaction parties, or import information from your **CONTACTS**


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## Shortcuts

# Property Tab

Complete or update information about the property

The screenshot shows the 'Property' tab in the zipForm Plus application. The interface includes a sidebar on the left with a 'Signatures and init...' section. The main content area features a 'MLS Connect' button and a form for entering property details. The form fields are as follows:

MLS Number	9876543
Street Address	123 Main Street
City	Springfield
Township	New Township
County	County
State	ST
Zip Code	12345
Legal Description	56789
Listing Date	98765

## Shortcuts

# History Tab

Track updates, events, and communications automatically

The screenshot shows the 'History' tab in the zipForm Plus application. The interface includes a sidebar on the left with a '234 Main Street - 23...' section. The main content area features a 'Search' bar and a list of events. The events are as follows:

Jane Smith has created the folder "Disclosures".	03/09/2015 11:00 AM
Jane Smith has edited the form Additional Provisions Addendum	03/04/2015 11:08 AM
Jane Smith sent invitation to collaborate to Jane Seller (cdavis@zipform.com)	03/04/2015 9:37 AM
Jane Smith shared form Additional Provisions Addendum with Jane Seller with editing rights	03/04/2015 9:37 AM
Jane Smith shared form Option to Purchase with Jane Seller with editing rights	03/04/2015 9:37 AM
Jane Smith has sent Listing and Disclosures for e-signatures using zipLogix Digital Ink®.	03/04/2015 9:35 AM

## The Transaction File

You now know how to:

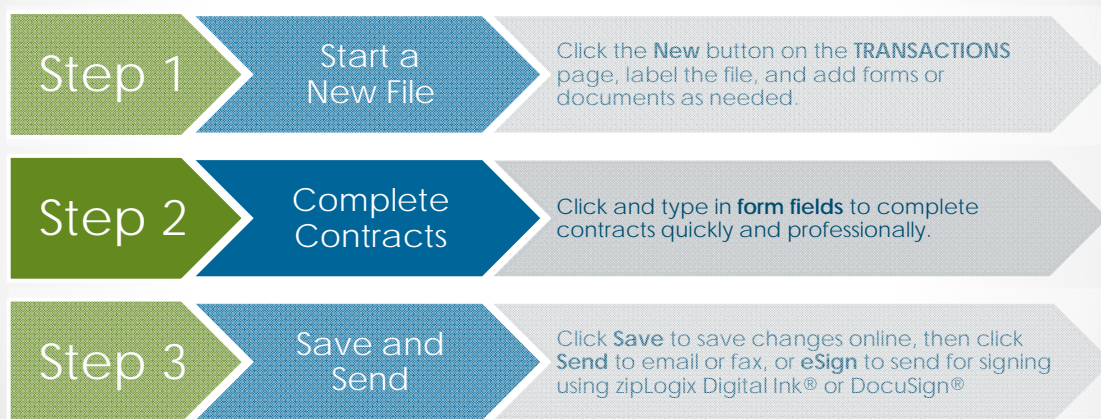
- ✓ Start a transaction file on zipForm® Plus
  - Use the Documents Tab to add forms and files
  - Find forms in libraries using the All Forms tab
  - Add Documents and Folders
- ✓ Add parties (contacts) using the Parties tab
- ✓ Update the Property Tab with Property information
  - Import MLS Data using zipFormMLS-Connect®
- ✓ Audit files using the History tab



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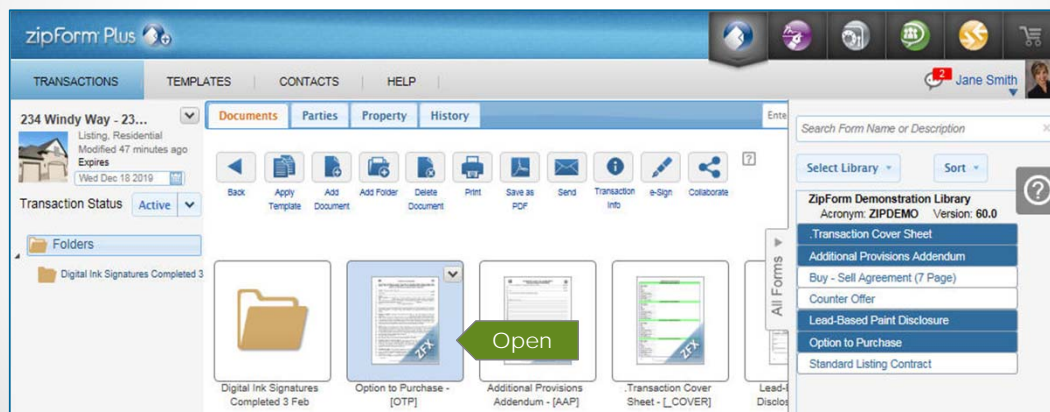


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# Open a Form (Contract)

Click once on a form in the "Documents" tab to open and fill it out



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# Click and Type to Fill Out Form Fields

The screenshot shows the zipForm Plus application interface with the 'Option to Purchase' form open. A green arrow points to a text field labeled 'Form Field'. The form includes sections for 'Parties', 'Grant of Option', and 'Exercise of Option'. The interface includes a sidebar with transaction details for '234 Windy Way - 23...', a top navigation bar with tabs like 'TRANSACTIONS', 'TEMPLATES', 'CONTACTS', and 'HELP', and a right sidebar with a search bar and a list of forms.



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## Summary

## Editing zipForm® Contracts

Tools in zipForm® Plus help you quickly and professionally update real estate forms in any file

Annotations in the screenshot:

- Open and edit forms:** Points to the 'My Forms' sidebar.
- Add more forms:** Points to the 'Form Libraries' sidebar.
- Enter text:** Points to a text field in the 'OPTION TO PURCHASE' form.

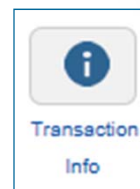
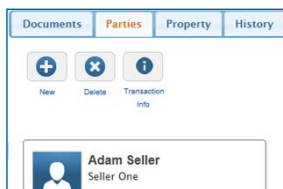
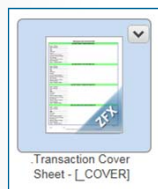

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## Shortcuts

## Completing Basic Information

Enter or update basic file information using the **Parties** and **Property** tabs, **Transaction Info** button, or the **Cover\_Sheet** form



- These locations contain the basic information for your file, including information about you, your clients, service providers, and the property.
- Updating information in any of these locations will automatically fill out the same information in your forms


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## Shortcuts

## Transaction Information/Cover Sheet

Use the method you prefer to enter file information

The left screenshot shows the 'Transaction Information' form with fields for Seller/Landlord One, Buyer/Tenant One, Buyer/Tenant Two, Buyer/Tenant Three, Buyer/Tenant Four, Seller/Landlord One, Seller/Landlord Two, Seller/Landlord Three, and Seller/Landlord Four. A blue arrow points to the 'Transaction Information' label.

The right screenshot shows the 'Cover Sheet Form' with fields for Seller 1 Name, Street Address, City, State, Zip Code, County, Home Phone Number, Business Phone Number, Fax Number, Cellular Phone Number, Email Address, and Seller 1 Marital Status. A blue arrow points to the 'Cover Sheet Form' label.


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## Shortcuts

## Full Screen Button

View larger contracts to make it easier to complete form text

The screenshot shows the 'Full Screen' button in the top toolbar. Below it is a sample contract form titled 'BUY - SELL AGREEMENT (Including Earnest Money Receipt)'. The form includes a 'My Forms' sidebar on the left and an 'All Forms' sidebar on the right. The main content area contains the following text:

1 This Agreement stipulates the terms of sale of this property. Read carefully before signing. This is a legally  
 2 binding contract. If not understood, seek competent advice.  
 3  
 4 Joe Smith DATE: June 3, 2015  
 5 as ☐ joint tenants with rights of a survivorship, ☐ tenants in common, ☒ single in his/her own right, OR  
 6 ☐ Other (hereinafter called "Buyer") agrees to purchase, and the  
 7 Seller agrees to sell the following described real property (hereinafter referred to as "Property") commonly known  
 8 as 234 Main Street, City, AP 07080  
 9  
 10 in the City of City, County of County, AP AP State State


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## Shortcuts

## Fastfill Button

Strips away form language, leaving only the fields to fill out

The screenshot shows the zipForm Plus interface. The 'Fastfill' button is highlighted in the top toolbar. The form fields are simplified, with labels like 'Seller 1 and Seller 2 Name', 'Listing Broker Firm Name', 'Property Listing Date', 'Property Listing Expiration Date', 'Property Listing Price', 'Terms', 'Property Legal Description', 'Legal Description', 'Property Street Address', 'Property Located in the City of', 'Property State', 'Property Zip Code', and 'Property Excludes'. The input fields are represented by yellow bars.

## Shortcuts

## Highlight Text

- Click and drag to select text, then click Highlight
- Double-click on highlighted text to remove highlighting

The screenshot shows the zipForm Plus interface. The 'Highlight' button is highlighted in the top toolbar. The form text is highlighted in yellow, demonstrating the Highlight function. The text includes a paragraph about the relationship between the lessor/lessee and the broker, followed by a section titled 'GENERAL PROVISIONS:' and a paragraph about the broker's duties and the seller's authorization.

## Shortcuts

## zipFormMLS-Connect®

Import listing information into forms from a participating MLS using the **MLS Connect** button.

[www.zipform.com/mlsconnect](http://www.zipform.com/mlsconnect)



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## Shortcuts

## Look Up Fields

- Drop-down fields can be used to look up text previously entered on other forms or transactions for this type of field
- Save time when entering information for common fields, such as:
  - City, State, Zip Code
  - Your Agent and Broker information
- Intellicopy** in the look up fields provides the "best guess" for the field at the top of the field's drop-down, for example:
  - Seller's address in the Property Address line
  - Brokerage information for the other side
- Edit field information by clicking the **Look Up** button on the Forms Tools (under "More")



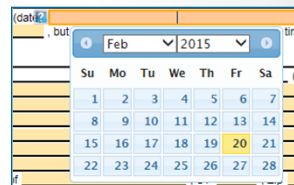
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## Shortcuts

## Automatically Formatted Fields

- Date fields are automatically formatted
  - Double-click to enter today's date
  - Click to select a date from the displayed calendar
- Price fields are automatically formatted
  - Commas and decimal points are entered automatically
  - Click the gray calculator button to open the mortgage calculator tool from a price field
- Use the **Space Bar** on your keyboard to override the automatic formatting
  - Use **ESC** to bring back the automatic formatting


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## Shortcuts

## Attach a Photo to a Form

**Attach Photo** from the quick tools, or by right-clicking on a form

1. Click **Attach Photo** and browse for the picture on your computer
2. Enter the photo's **Caption**
3. **Add** more photos, as needed
4. Click and drag the **[Photos #]** tag to position the reference on the form (Positioning will change the number on the tag relative to other tags)


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Shortcuts

## More (...) Tools

- **Attach Photo** – Add a photo to the form
- *(the photo will be added as a new page at the end of the form)*
- **Check Spelling** – Spell check the form fields that you have completed.
- **Notes** – Add an electronic sticky note.  
*Note: Notes on forms do not print, but they can be included when emailing the form(s).*
- **N/A Fill** – Enter “N/A” or text of your choosing in the blank text fields of this form.
- **Look Up** – Edit the text remembered by the Look Up fields for your forms.
- **Undo/Redo** – Undo or redo a change to a form field  
*(CTRL + Z on a PC or Command + Z on a Mac will also work)*
- **Activate Intellicopy** – Automatically copy the intellicopy fields through the form.

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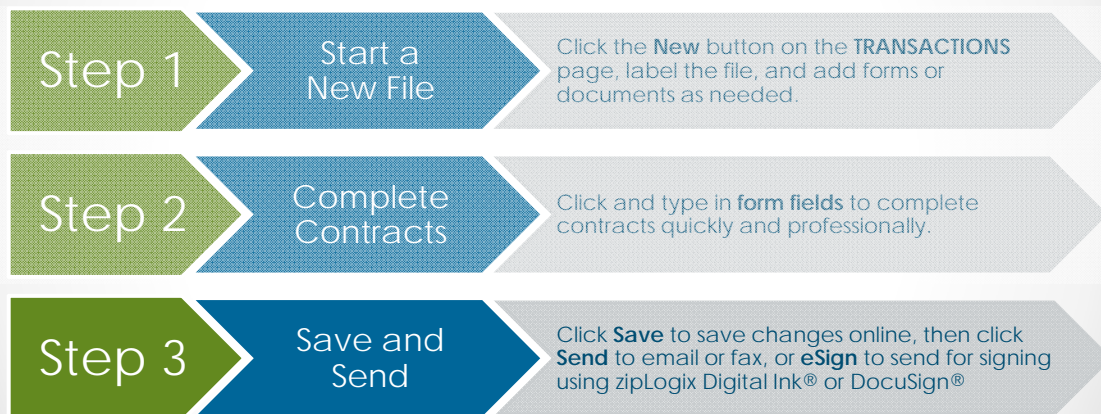
## Completing Real Estate Forms

You now know how to:

- ✓ **Save time with Transaction Information or The Cover Sheet form**
  - Basic information for the transaction
  - Similar to the Parties and Property tabs
- ✓ **Fill out forms using tools and shortcuts**
  - View the form larger using Full Screen view
  - Use editing tools, such as Fast Fill and Highlight
  - Use Look Up Fields to look up text typed previously in other forms
  - Automatically formatted date, price, and number fields
  - Use additional Quick Tools

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## Save Changes

Changes are also saved when you add forms, switch forms, or use Fastfill

zipForm Plus

TRANSACTIONS | TEMPLATES | CONTACTS | HELP

Jane Smith

234 Windy Way - 23...  
Listing, Residential  
Modified 47 minutes ago  
Expires [Date]  
Transaction Status: Active

**My Forms**

- Option to Purchase
- Additional Provisions Addendum
- Cover Sheet
- Transaction Cover Sheet
- Lead-Based Paint Disclosure
- Buyer Checklist (House #1) - 03/2008
- Existing Home Info Sheet - Interior -

**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

3

4

5 Parties: The parties to this Option are John Smith of (800488)

6 234 Windy Way, City, ST 12345

7 (Seller) and

8 Full Name of First BUYER, TENANT or SUBTENANT Jane Doe of (800488)

9 (Buyer)

10 Grant of O

11 of S y to Seller of the amount is hereby acknowledged.

Search Form Name or Description

Select Library Sort

ZipForm Demonstration Library  
Acronym: ZIPDEMO Version: 60.0

- Transaction Cover Sheet
- Additional Provisions Addendum
- Buy - Sell Agreement (7 Page)
- Counter Offer
- Lead-Based Paint Disclosure
- Option to Purchase
- Standard Listing Contract



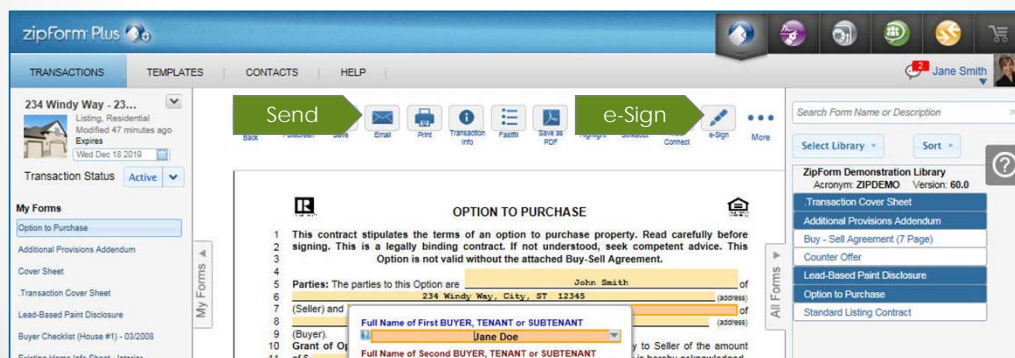
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## Send (eMail/Fax) or e-Sign

Send and share forms directly from the forms page, or send from the Documents tab inside the file.



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## Share Your Screen

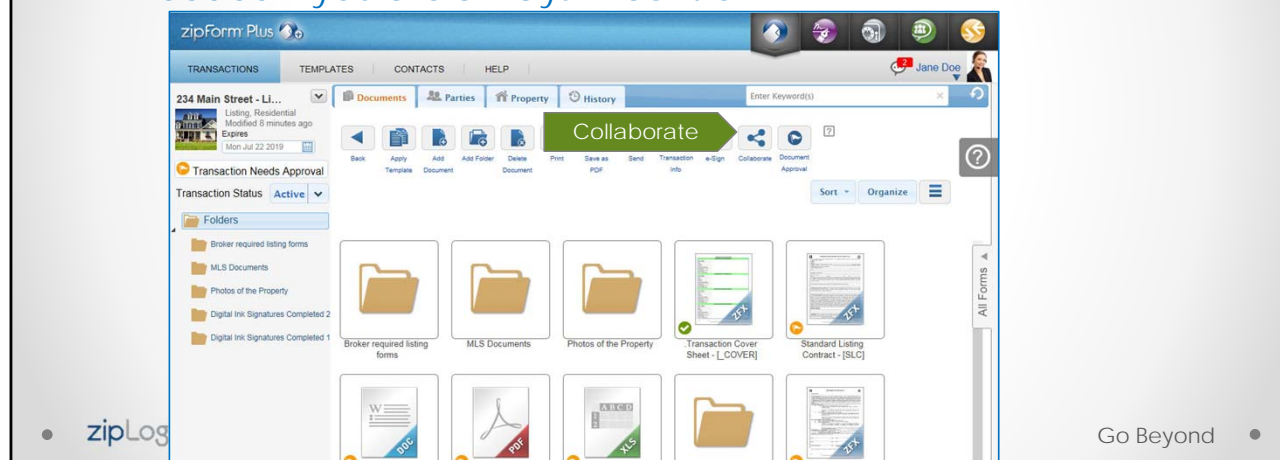
Use zipConsult to meet face-to-face online to review contracts with clients as you fill them out or before clients sign





# Collaborate Online

- Share contracts and let others fill in contract information as needed – you are always in control

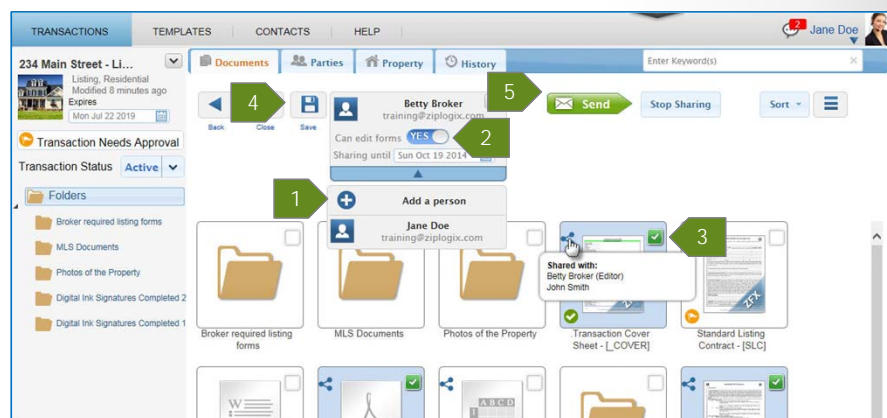


# Collaborate Online

## Share forms and documents

1. Click **Add a person**
2. (Optional) Allow them to **edit forms**
3. Click the check box to select forms and documents to share
4. Click **Save** to save changes
5. Click **Send**

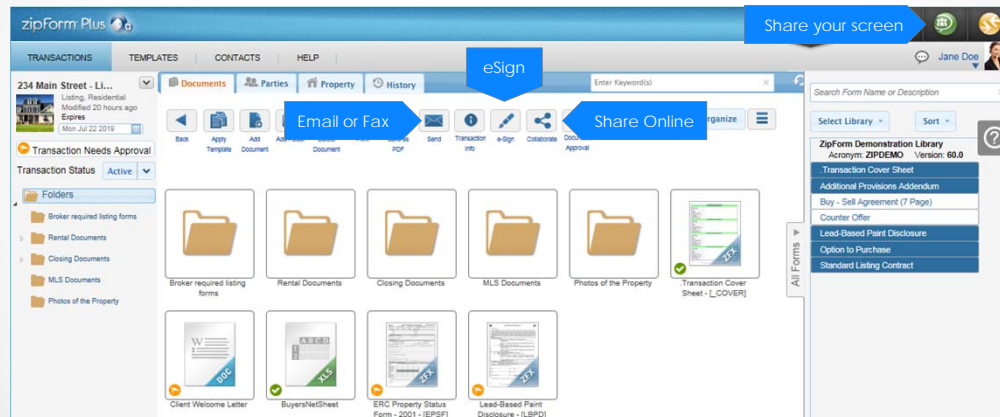
This sends a zipLogix Community (Collaboration) link to the recipient(s)



## Summary

## Saving and Sharing

Save forms online, then share forms with anyone using the email and fax options, Collaborate button, or zipConsult screen sharing, and use the eSign option for paperless signatures

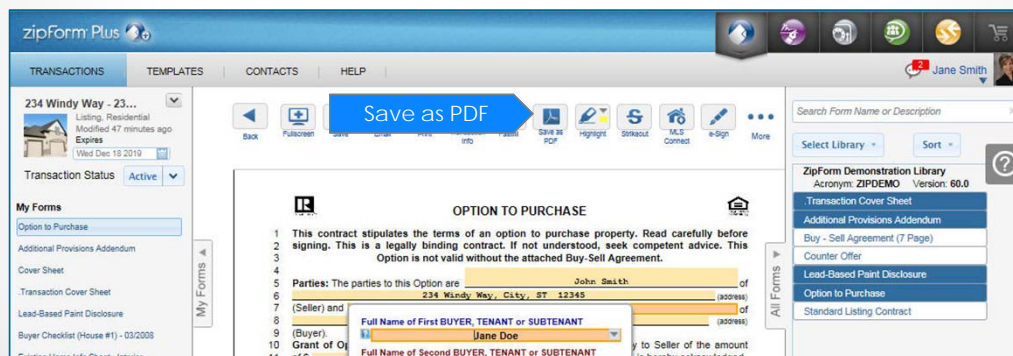

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## Shortcuts

## Save as PDF

Save to your computer or to the file to preserve a copy of the unsigned form at this point in time.


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## Saving and Sharing Forms

You now know how to:

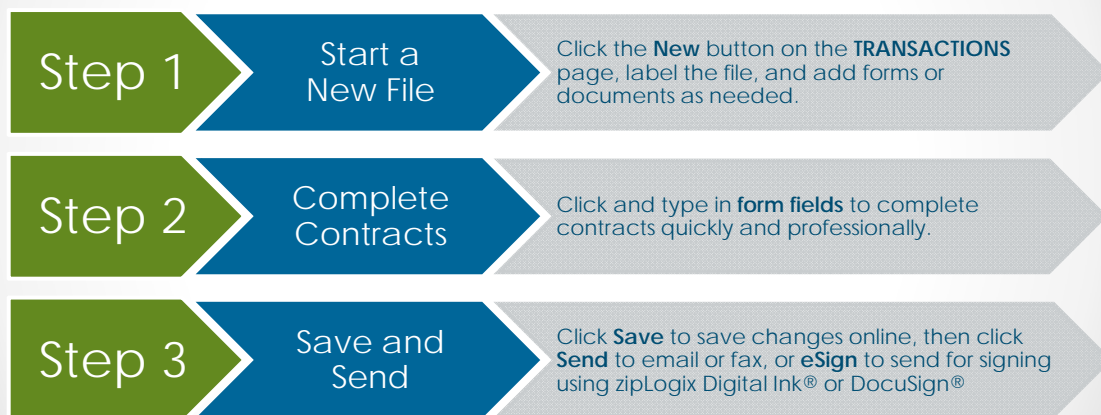
- ✓ Save forms using the Save button
  - Files also saved when adding a form or navigating to a new form
  - Enable automatic saving through the profile
- ✓ eMail or Fax using the Send button
- ✓ Save as PDF
  - Save to a computer
  - Save as PDF within the file (zipVault®)
- ✓ Review files online using zipConsult™
- ✓ Share documents or forms online using the Collaboration tool



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## Getting Started in zipForm® Plus



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## Next Steps

- **Try it! Reinforce your learning**
  - Sign in to zipForm® Plus
  - Create your own zipForm® File to practice
    - Add the forms you need for a standard listing or sales presentation, so you will be prepared for your next client presentation
    - Explore the features within the file – don't be afraid to try something new!
    - If you need to, use the "Delete" button to delete the file
- **Learn more! Review your training and increase your skills**
  - **Training on Demand** – [www.YouTube.com/ziplogix](http://www.YouTube.com/ziplogix)
  - **Step-by-Step Instructions** – Click the (?) button in zipForm® Plus
  - **Live Webinars** – Sign up for a future live training at [www.zipLogix.com](http://www.zipLogix.com)



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## Training and Support

### Training

- Training on demand:  
[www.youtube.com/ziplogix](http://www.youtube.com/ziplogix)
- Live online training via webinar:  
[www.zipLogix.com/training](http://www.zipLogix.com/training)
- Click the (?) icon or HELP link for in-app training and support in zipForm® Plus

### Support

- Phone support:  
586-840-0140
  - 24 hours Monday - Friday
  - 10 am to 10 pm Eastern Time Saturday and Sunday
- Online Support, FAQs, and Knowledge Base:  
<http://support.zipLogix.com>



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# Thank You

Additional information and resources:

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



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

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