Paperless Transactions

A quick start guide to using zipLogix® online programs

Complete real estate transactions quickly and professionally from anywhere with safe and secure online forms, signatures, management, and storage, all through www.zipformplus.com

Contents

zipForm® Plus and zipTMS™ are brought to you by the National Association of REALTORS®

Quick Reference: Tools

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.

Delete
Select files to delete. Please note, deleting a file from the Transactions List will delete the forms, documents, and links to zipLogix Digital Ink® signed documents for this file.

After clicking delete, you will be prompted to select files to delete. Delete by clicking the Delete button.

Click Cancel to exit out of the delete screen, and return to the main Transactions List options.

Import
Import a downloaded file to your transaction files.

Export
Select files to download to your computer, saving them offline for backup

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 clauses 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.

Mortgage Calculator
Calculate rates or payments, or download an amortization table for fixed rate loans.

List View
Switch to viewing a list of transactions, documents, or contacts (zipForm® Plus will remember your preference).

Documents Toolbar

Apply Template
Add a saved standard set of forms, folders, documents, tasks, and contacts. Create from the TEMPLATES page.

Add Document
Upload a document to store it online with this transaction file.

Save as PDF
Save a form as a PDF in this file or to your desktop in order to preserve a copy of this form in its current state.

Send
Email or fax documents and forms (as PDFs) to anyone – no special equipment or accounts required.

e-Sign
Send forms or documents for signatures using the eSign service of your choice (pick zipLogix Digital Ink® or DocuSign® in your Profile).

Collaborate
Share forms and documents online with anyone while tracking editing and viewing history.

Copy PDF
Copy a PDF document from this file to another transaction file.

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

Task Toolbar

View Calendar
Switch to a calendar view of tasks according to due date.

New Task
Add a task, event, or reminder for something you are working on when viewing a checklist.

New Checklist
Label a new checklist (set of categories and tasks).

New Category
Create a new category for tasks in this file. Categories can be color-coded for easy identification.

Send
Send a PDF of the checklist as an email attachment to a person of your choosing

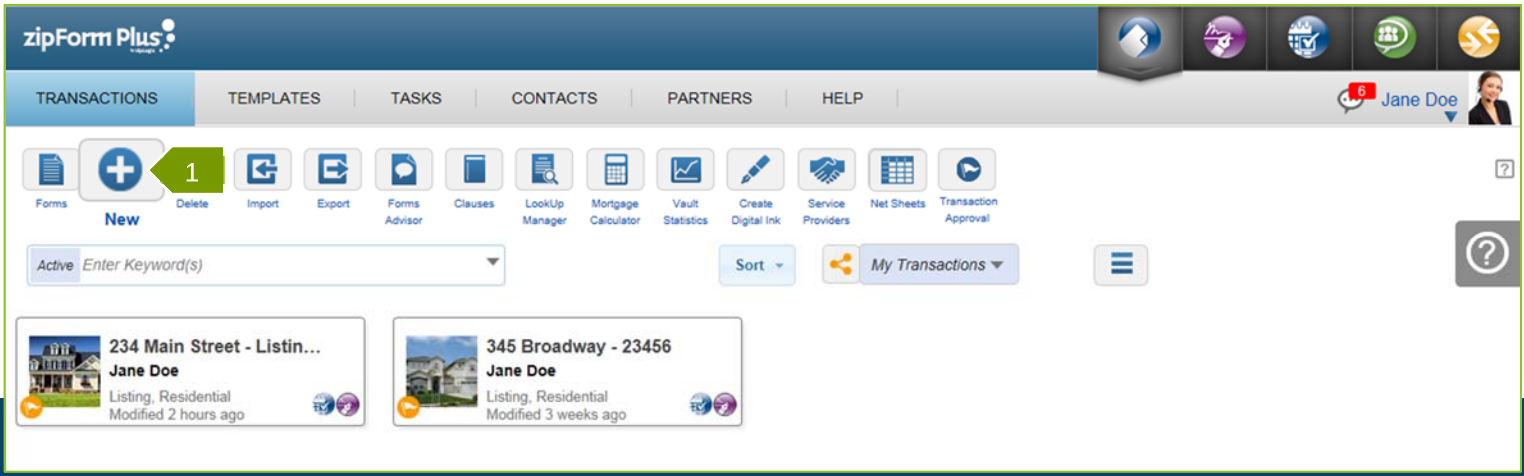
Delete
Select individual items, such as tasks or categories in order to delete them.

Urgent Tasks
View all of the tasks coming due or past due.

Starting a Transaction File

A seamless online transaction starts in zipForm® Plus, your central location for professional real estate files and contracts. Sign in at www.zipformplus.com

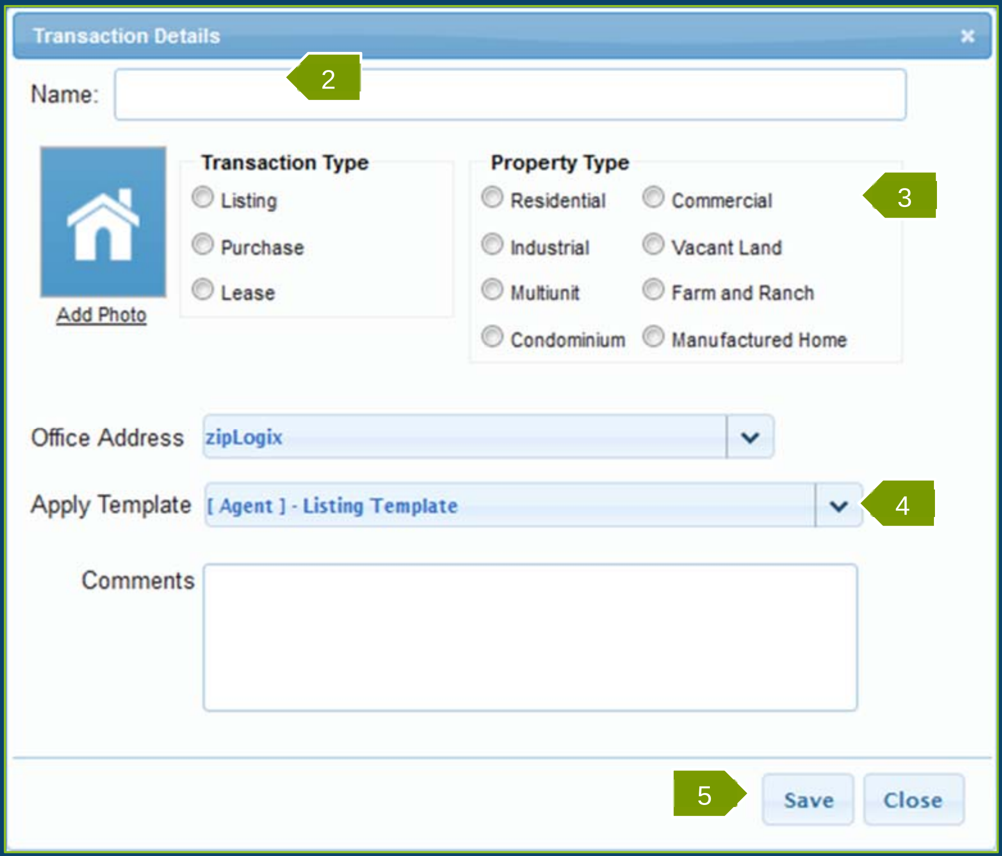
The transaction file is a set of contracts (zipForm® forms, contracts signed using zipLogix Digital Ink®, and uploaded documents in zipVault®) for a specific client or property. Transaction information, including Transaction Parties and Property Information, automatically flows from form to form as each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



Start a Transaction

The transaction file stores all of your forms, documents, and signed contracts.

1. Click the **New** button on the TRANSACTIONS page
2. **Name** the file
   Tip: You can later search for files by name, address, client's name, and more with the "Enter Keyword(s)" field on your Transactions page
3. Select the **Type**
4. 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.
5. **Save** changes



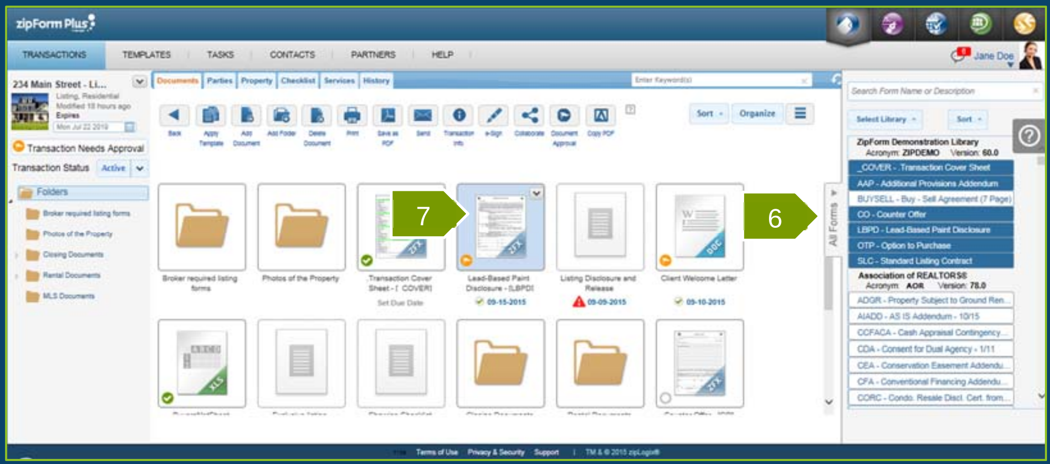
Adding and Completing Contracts

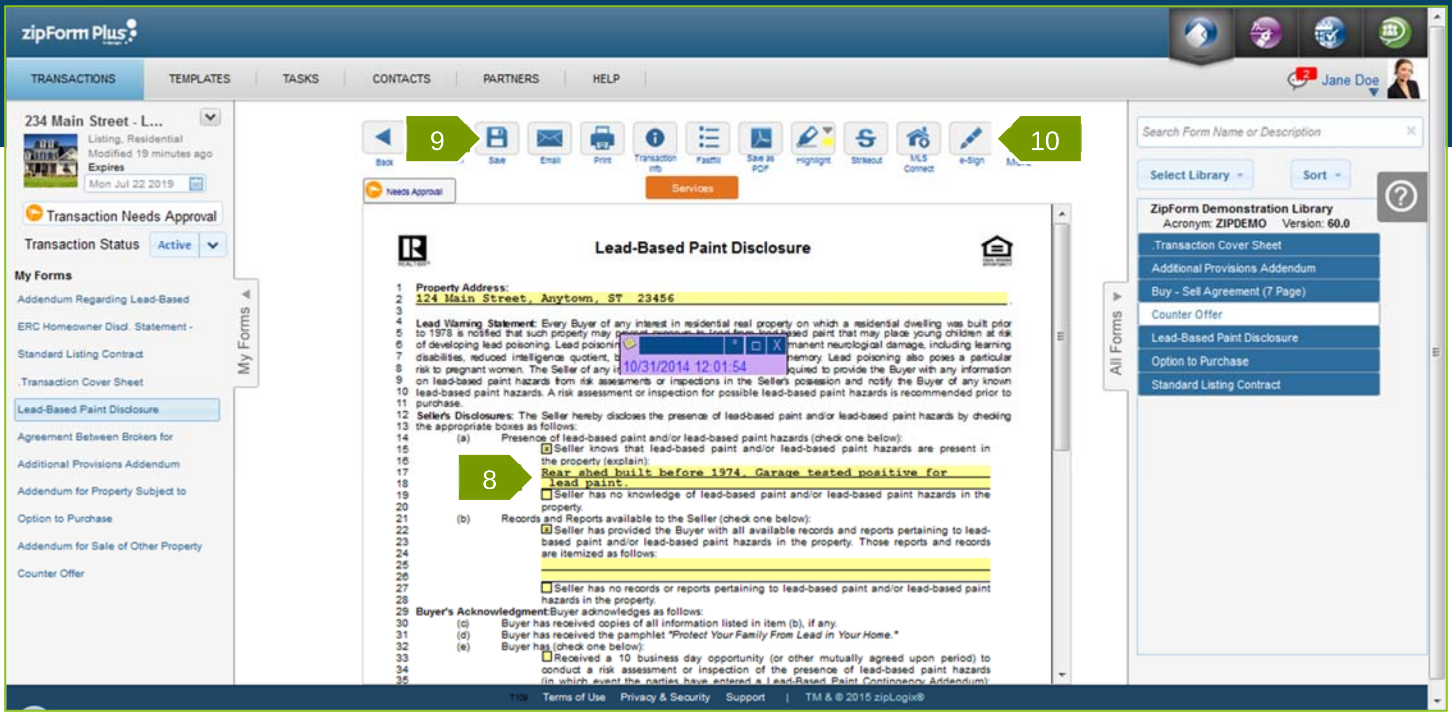
Add a form that can be completed with personal and property information, then use the eSign, Email, Print, Collaborate or Save as PDF buttons to share forms with others, or share your screen with a client using the free zipConsult™ tool (the round green button at the top of the page).

zipForm® Plus Forms

Quick, accurate, and professional online contracts inside your transaction file.

6. Click a form name in the **All Forms** tab to add it.
7. Click on a **form** in the file to open it and fill it out.
8. Click and type to fill out highlighted form fields
9. Click Save
10. Send contracts using the Email or eSign button.





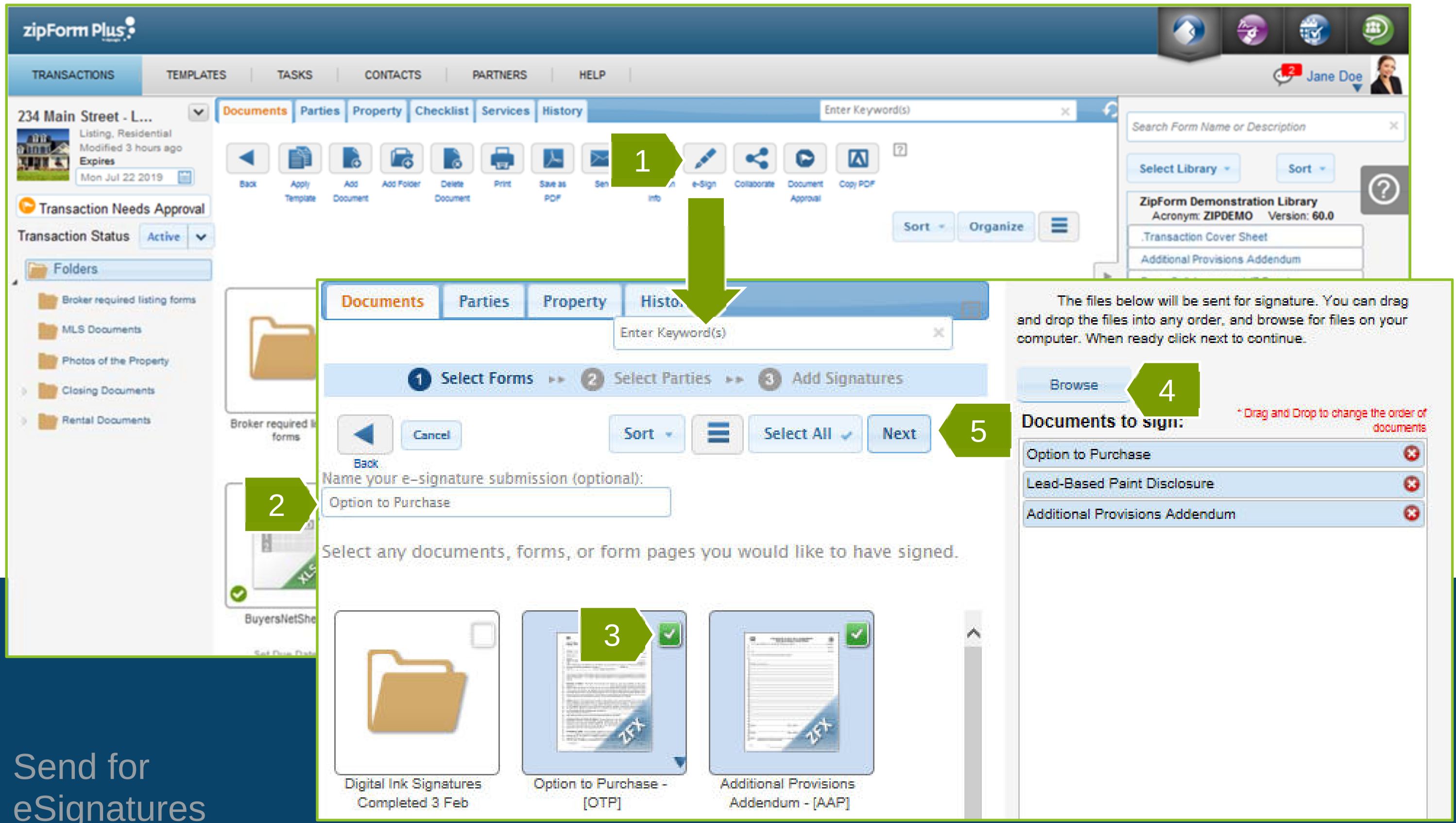
Forms are accurate and current, since they are provided by your association, brokerage, MLS, or other authority, ensuring the best possible protection for you and your client throughout every transaction.

In addition to being able to complete zipForm® forms, you can store electronic documents for the transaction ranging from pictures to PDFs. Use the **Add Document** and **Add Folder** buttons inside the transaction to stay organized securely online for every property sale.

eSign for Paperless Signatures

e-Sign

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



Send for eSignatures

Easy and secure

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 and continue to select signers and signing locations according to your selected signature service

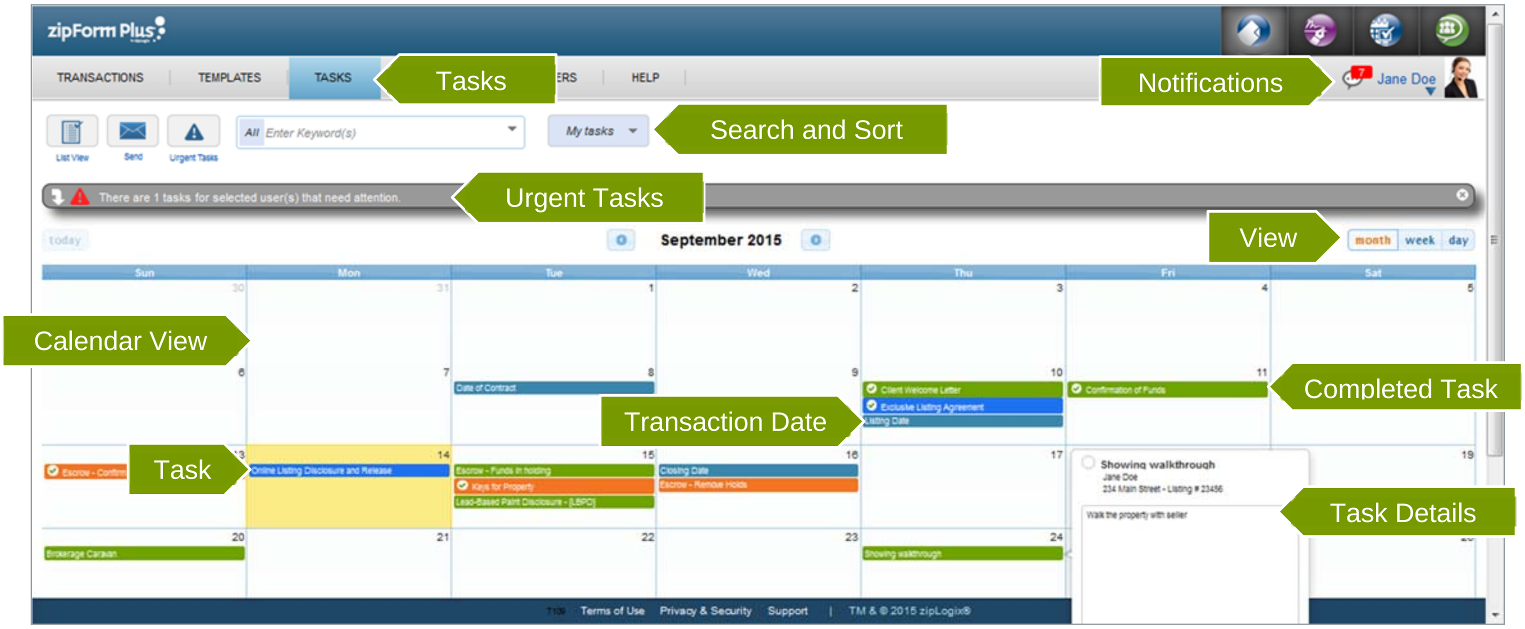
Signing documents with zipLogix Digital Ink® creates a complete, verifiable signed document which cannot be altered after signing. With a fully integrated digital signing experience, it is easier than ever to bring the security and convenience of digital signatures to the closing table.

zipLogix Digital Ink® is not endorsed by the National Association of REALTORS® and is not included as part of NAR's REALTOR Benefits® Program. DocuSign is the official and exclusive provider of electronic signature services for NAR Members under the National Association of REALTORS® REALTOR Benefits® Program.

Tasks and Deadlines in zipTMS™

Secure Online Transaction Management

Keep all of your sales files organized and available anytime. zipTMS™ allows you to work with your office, track tasks, complete contracts, and manage important documentation from one easy location.



The zipTMS™ **Tasks** page provides a comprehensive calendar of important events for every file. Use the **Search and Sort** tools to change between list view and calendar view, view urgent tasks, and instantly find tasks by name or category.

Tasks include due dates, appointments, document deadlines, and template tasks from your transaction files. zipTMS™ helps you stay on schedule with your tasks through **Notifications** and the **Urgent Tasks** list. In addition to the tasks, important **Transaction Dates** are displayed on your calendar or task list. Click to switch the **Calendar View** to Month, Week, or day.

Each **Task** is color-coded, based upon its checklist category, and **Completed Tasks** are easily identified by a green check mark next to the task name. Click on a task name to open any task to view the **Task Details**, or click and drag to change a task due date.

Edit Task

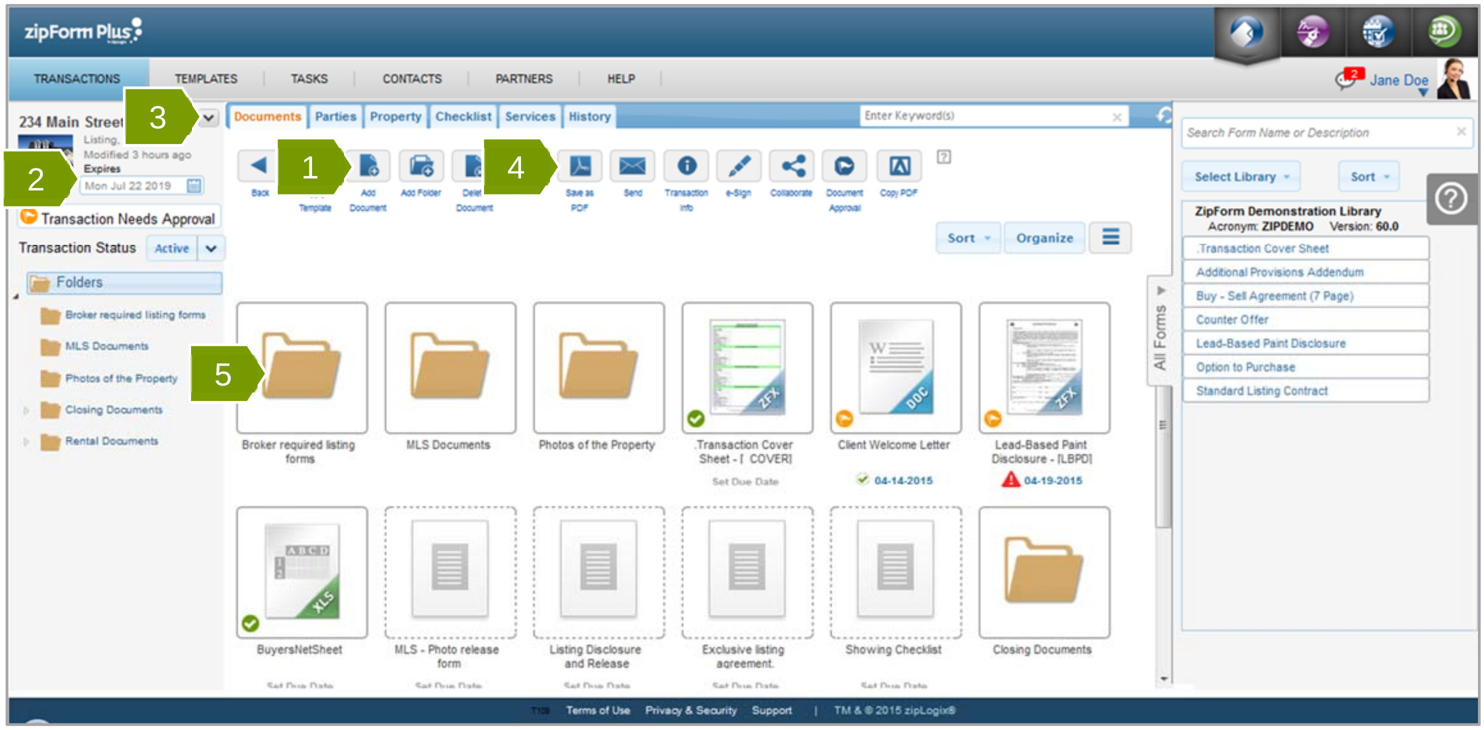
Updates to file tasks are easily managed.

11. Edit the **Task Name**
12. Toggle task **completed** status
13. Add or edit **Comments**
14. Change the **Due Date**
    *(A **Relative** due date is a date which depends upon a **Transaction Date**)*
15. Remove or **Attach Documents**
16. **Save** changes

Storing files online

zipTMS™ 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 zipTMS™ means saving time and money.

Adding a document 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.



Adding Computer Files to the Transaction

1. Click Add Document 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 (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.
4. Unsigned forms can be preserved as part of the file for sharing or documentation using the Save as PDF 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, once signing is completed by all parties.

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

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

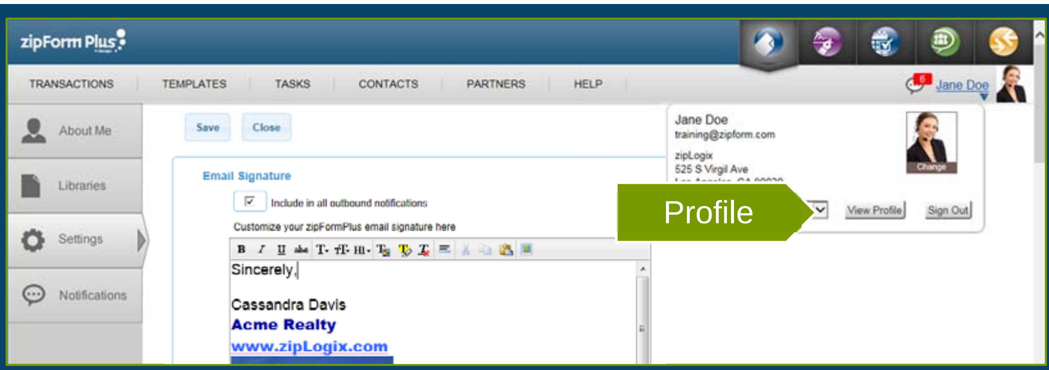
Personalize Settings

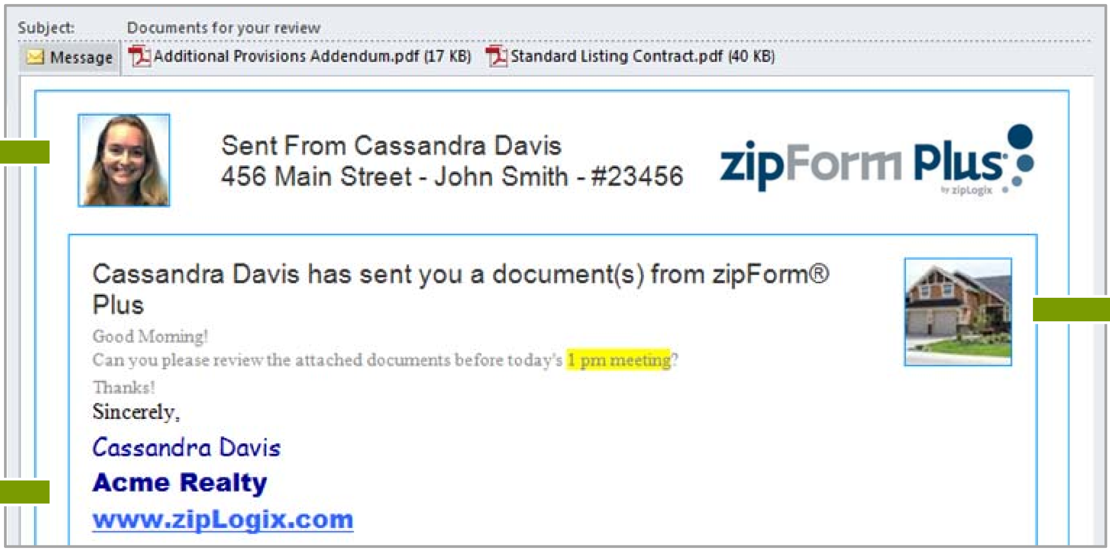
Customize your zipForm® Plus account from your Profile page. Emails sent from zipForm® Plus include your photograph and email signature, which can be added through your profile, and a property photo, which can be added to the file by clicking on the photo on the property folder.

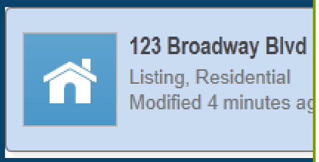
Edit Profile

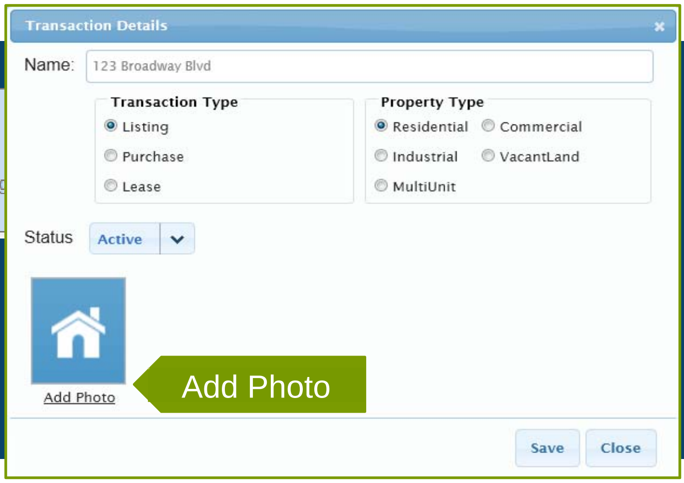
Click on your name next to your profile picture in the top right corner of zipForm®.

Click **View Profile** and use the **About Me** section to edit your photo, contact information, and signature for emails from zipForm®.









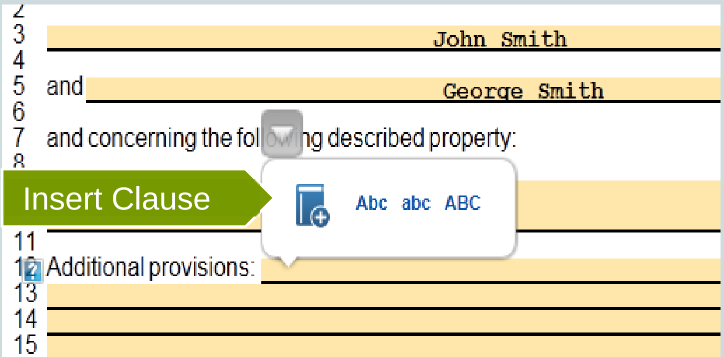
Property Image

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

Time Saving Tips

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



Tip 1: Save clauses and use them in text fields

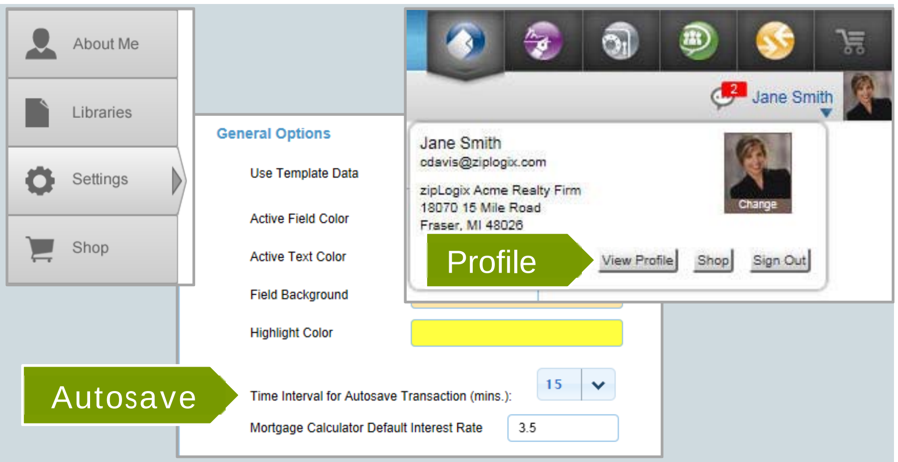
Common paragraphs, sentences or phrases can be saved and inserted into form fields quickly. Create and save clauses by using the Clauses button on the Transactions page, and then insert a clause using the Insert Clause button within a text field on a form.

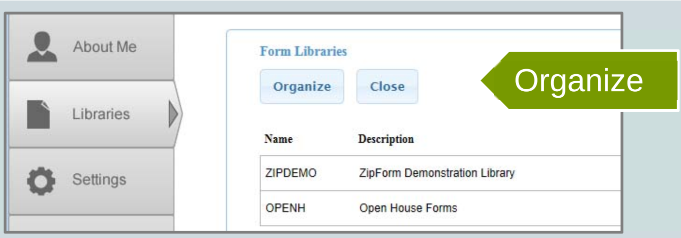
To reach the **Insert Clause** button, click on a form field. Click the gray pencil button to open the insert clause and change case buttons.

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.