Sending Documents with zipLogix Digital Ink®

Send files for secure click-to-sign e-signatures directly from zipForm® Plus

zipLogix Training
Training@zipLogix.com

zipForm® Plus is brought to you by the National Association of REALTORS®
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.

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Signing Contracts Paperlessly

Congratulations! Your client is ready to execute the contract.
How do you make signing easy for you and your client?

✓ **Professionalism** – Use the eSign button so that signers can click to sign from any computer or tablet, without waiting for couriers or driving long distances

✓ **Accuracy** – Signature areas are "pre-tagged" (marked for you) by zipForm® Plus according to the signer's role when you use the eSign button to send for signatures

✓ **Expertise** – Your expertise travels with the contracts, since you are always in control of who is signing, where they sign or initial, and what they fill out

✓ **Trust** – Contracts are secured with **Digital Signatures**, ensuring signature *and* contract authenticity can be confirmed each time the PDF is opened

* With zipForm® Mobile

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Slide 1:

zipLogix Digital Ink®

Secure e-Signature Packets

en manner according to said law. SELLER CERTIFIES THAT SELLER HAS COPY OF THIS CONTRACT, SELLER FURTHER CERTIFIES THAT IT HAS ELLER UNDERSTANDS THAT IF SELLER CONVEYS HIS/HER INTEREST IS LISTING OR IF SELLER REVOKES THE UNDERSIGNED BROKER'S E ABOVE STATED COMMISSION.

DIGITALLY SIGNED   2014-07-22 17:43 GMT

Signature of Seller   John Smith   Date
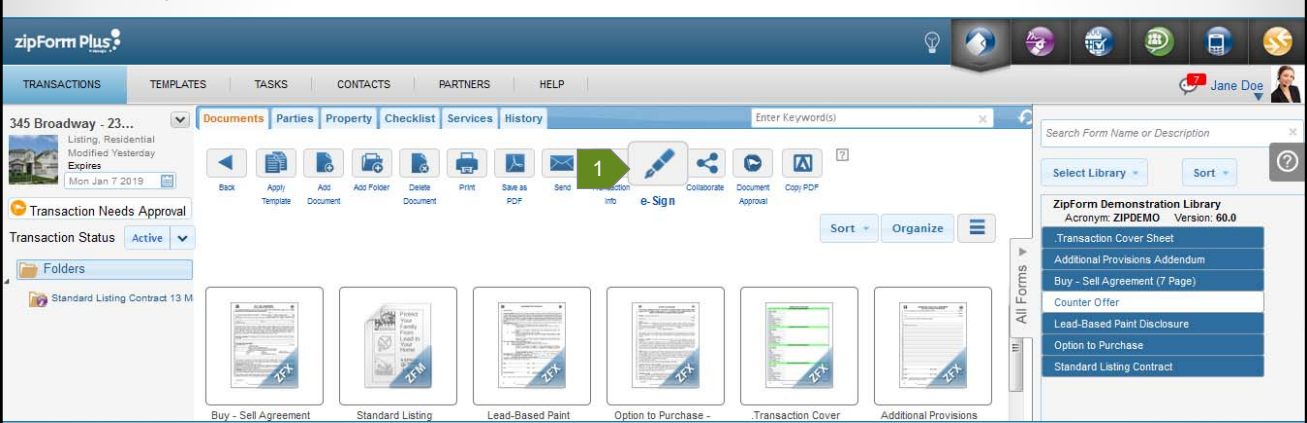
- Confirms signatures are valid <u>each time</u> the PDF opens
- Prevents tampering with the final contract
- Visible through the free Adobe Acrobat Reader and compatible viewers

*Note: Some PDF **preview** programs will not show the signatures because they do not have the ability to confirm the validity. If this happens, visit www.adobe.com/reader to download and install the free Acrobat PDF viewer.*

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Slide 2:

Select Forms to Sign

e-Sign

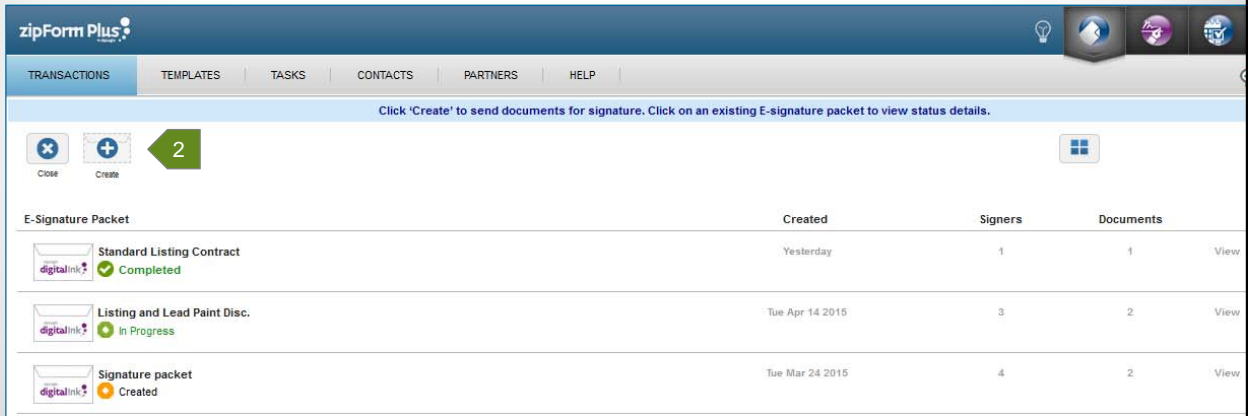1. Click the eSign button within the zipForm® Plus Transaction file, or when filling out a form in zipForm ® Plus.

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Create a new e-Signature Packet

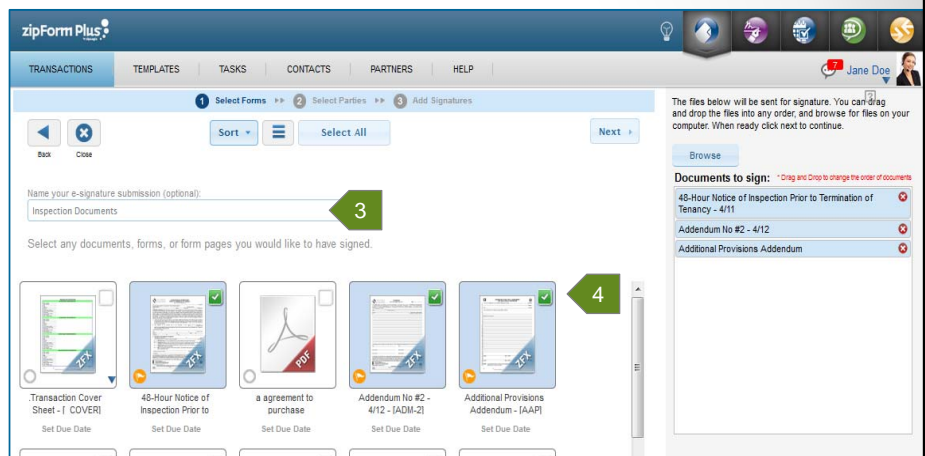2. Click **Create** to start your e-signature packet of documents to send for signing

Select Forms to Sign

3. Enter a name to identify this e-signature packet in the e-Signature Packet list *(Optional)*

4. Click the Check Box to select forms and add them to the list of Documents to sign

Tip: Use the blue ▼ arrow in the lower right corner of a multi-page form to select a specific page or pages to send.
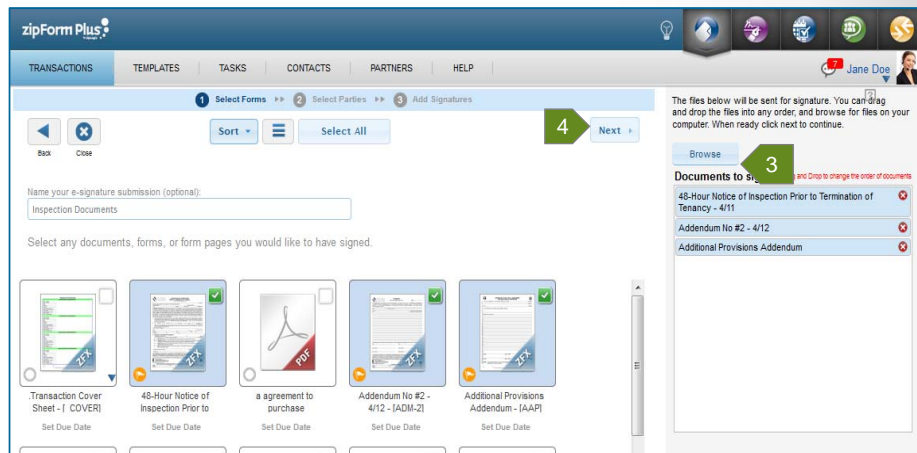
Select Forms to Sign

5. Use the **Browse** button to add PDF documents to this packet from your computer *(Optional)*
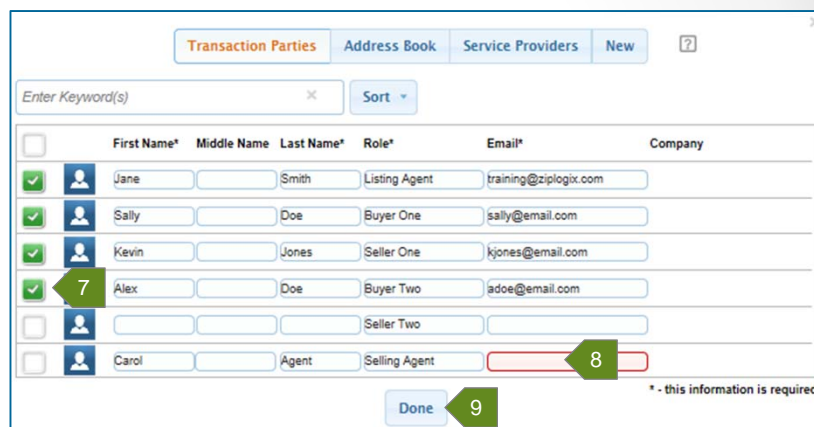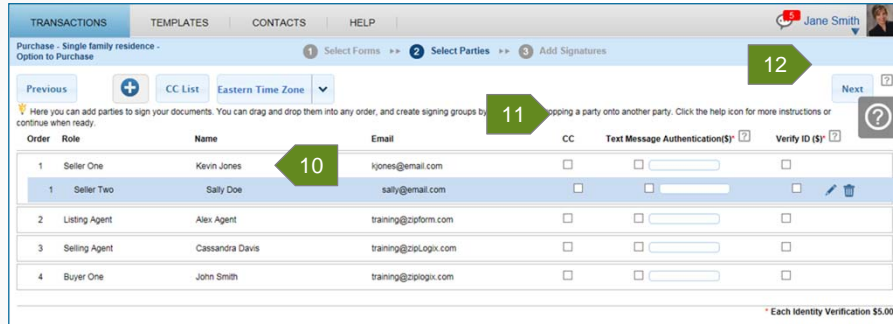
6. Click **Next**

Select Signers

7. Click **to check the check box** to select signers

8. Enter required information for signers, such as email address or role (their role determines what signature fields they will be prompted to complete)

9. Click **Done**

Select Signers

10. Click and drag to change the signing order. Drag one signer on top of another to have them sign at the same time. *(Optional)*
11. Select **signer options**, such as CC to automatically email signed contracts as PDF attachments from the system once signing is complete. *(Optional)*
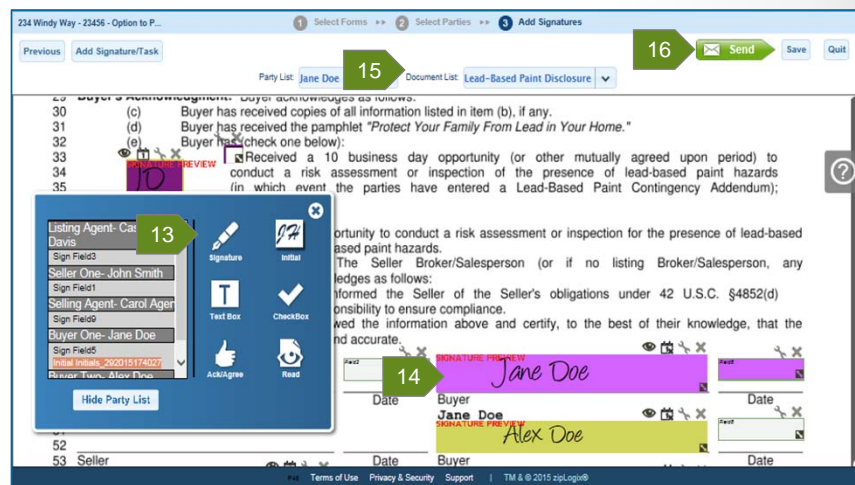12. Click **Next**

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Add Tasks

13. Signing tasks allow signers to execute the contract. **Click and drag** an icon to add a signature or task, if needed.

14. The sample signature preview helps with sizing signature areas.

15. Review **tasks** on all documents on the Document List.

16. Click **Send**

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Send Now

Customize the message for all signers *(Optional),* and then click **Send Now** to send the email invitation to start signing.

Documents Sent for Signatures

Your e-signature packet has been sent to the first signer(s) for their signatures, and you will see a summary of what was sent. Click **Close** to return to zipForm®.

E-Signatures

You now know how to:

☑ Send forms to be signed using the eSign button

☑ Select documents to send for signatures

☑ Select signers

☑ Review signature areas on the form and send for signatures

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Training and Support

Training

- Training on demand:
  www.youtube.com/ziplogix

- Online Training:
  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

Information and resources:
www.ziplogix.com

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