

# zipForm® Plus

## Help at a Glance

### Contents

Quick Tools .....	2
Step-by-Step: Starting a File.....	3
The zipForm® Plus File: TRANSACTIONS.....	5
The zipForm® Plus File: Forms and Documents.....	5
Using zipLogix Digital Ink® .....	7
Using DocuSign® .....	8
Using zipVault® .....	9
Transaction Archiving and Storage .....	10
Personalization for zipForm® Plus.....	11
Tips and Tricks.....	12

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



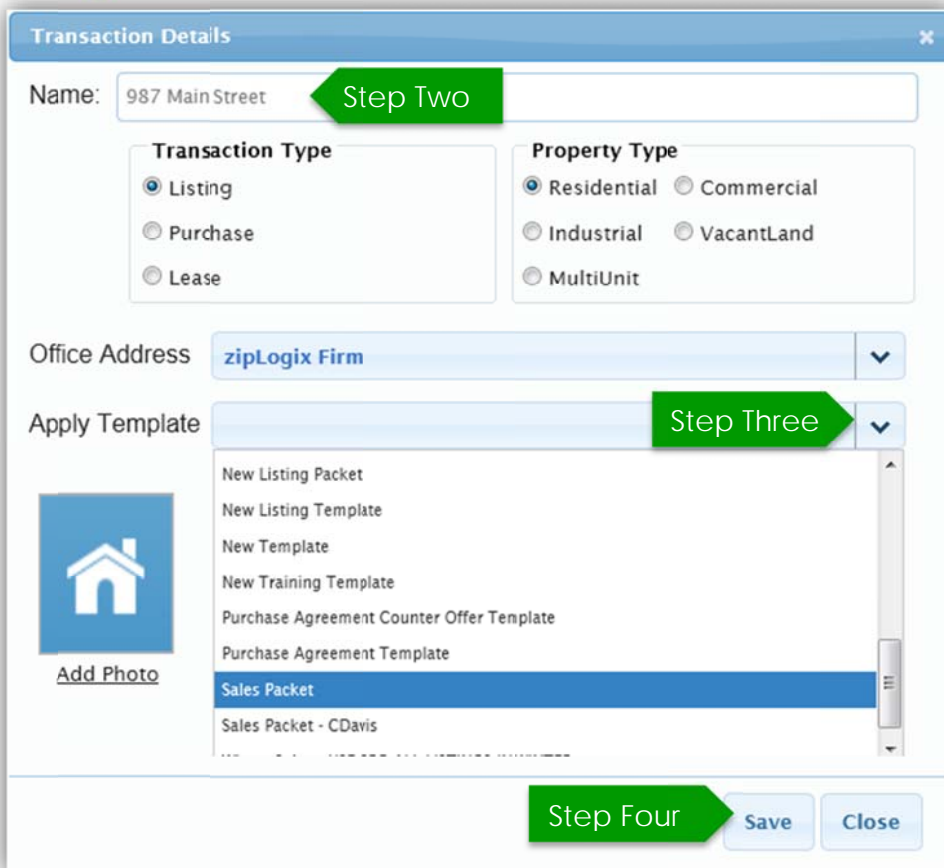
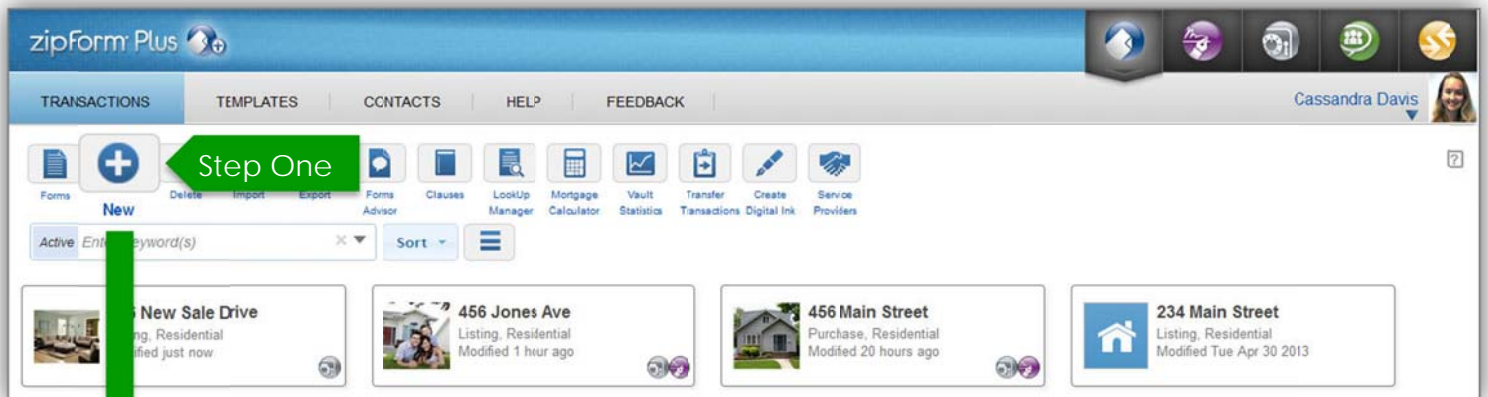
**Import from MLS** – Import MLS data into your forms (for MLS participating in zipForm® MLSConnect)



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

# Starting a File

The transaction file is a set of contracts (zipForm® forms) 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®.



Step One: Click the **New** button on the **TRANSACTIONS** page

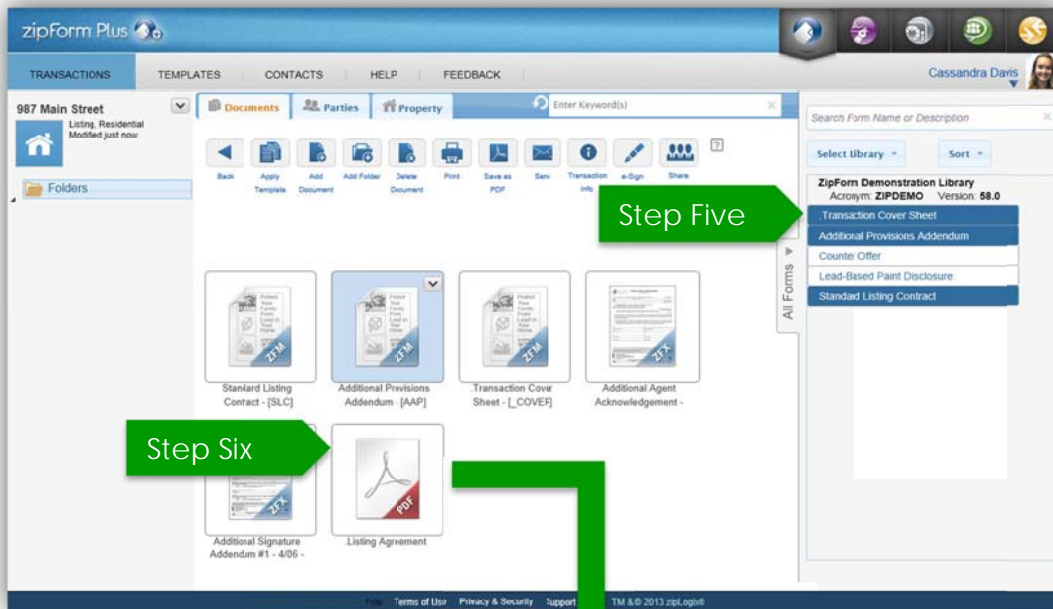
Step Two: Enter the **property address** to name the file

*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*

Step Three: 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.*

Step Four: Click **Save**



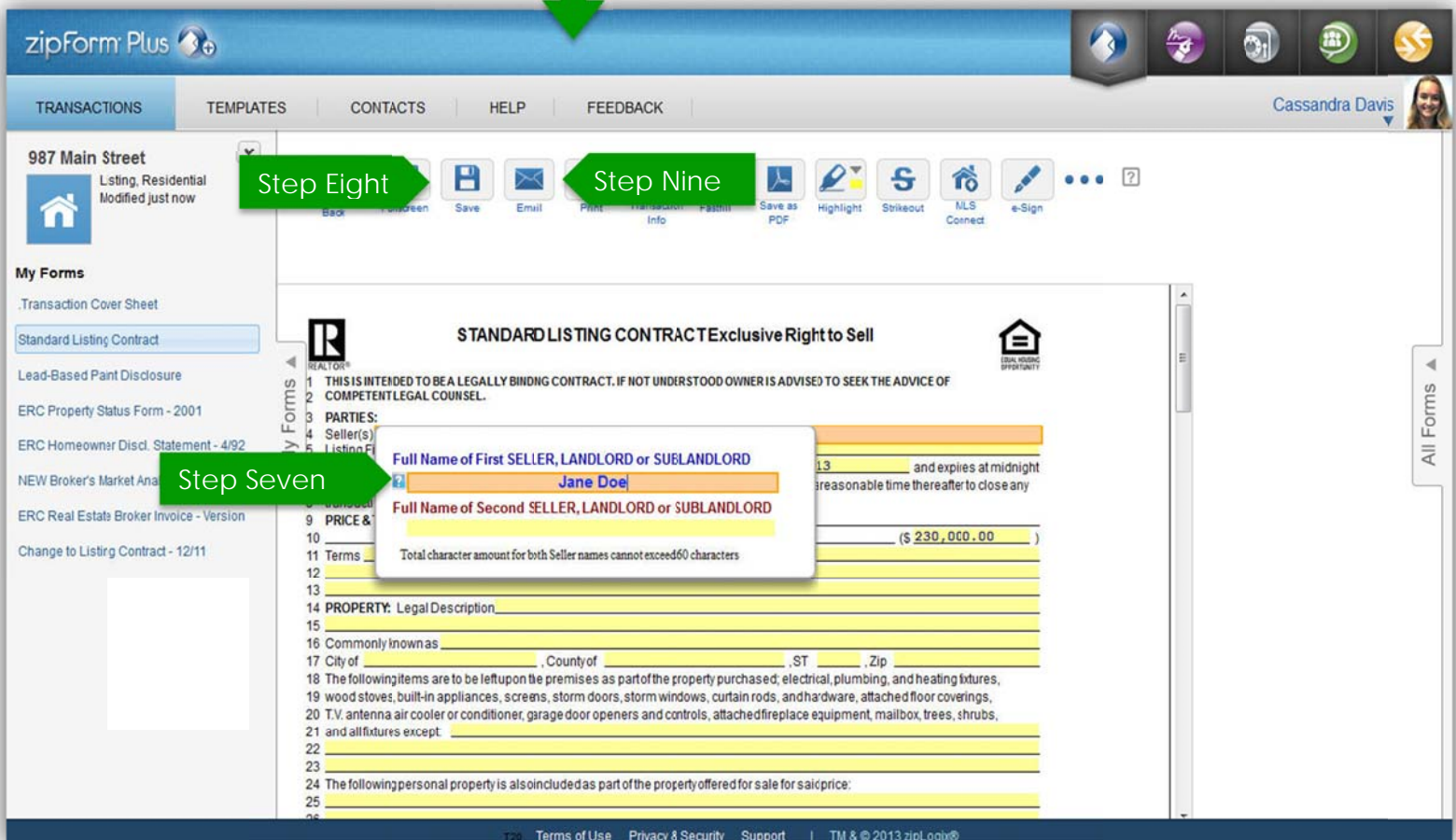
Step Five: Click a form in the **All Forms** tab to add it to the file.

Step Six: Click a **form** to open it and fill it out

Step Seven: Click and type to fill out **form fields**

Step Eight: Click **Save**

Step Nine: Click **Email** to email or fax contracts



# The zipForm® Plus File

## TRANSACTIONS Page

Easily start a new file, or quickly find files with real-time search and personalized file views.

**Key Tools:**

- Switch to a list view of files
- Start a new file
- Send a PDF for signatures
- Open the forms editing page

**Transaction File**

Click the file name to open the file. To edit the picture or file properties, click the property image. Or, click the menu arrow [v] for more options.



## Forms Page

Easily fill out transaction contracts, or click a form in the All Forms tab to add a new form to the file.

**Key Tools:**

- Switch to full screen view
- Transaction Information
- Fast Fill mode
- Import MLS listing data

## Inside the Transaction File

Click a document to open it. Click and drag a document to a folder on the left to organize the file.

**Key Tools:**

- Apply Template
- Add (upload) a new document
- Add a folder
- Send (email or fax) forms



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.



The screenshot shows the zipForm Plus interface with a "Residential Listing Agreement" form. Annotations include:

- Select Document:** A green arrow pointing to the document selection dropdown menu.
- Send:** A green arrow pointing to the "Send" button.
- Signer:** A green arrow pointing to the "Signer" list on the left sidebar.
- Add Tasks:** A green arrow pointing to the "Add Tasks" button in the sidebar.

The form content includes fields for "Mister Seller", "Best Realty, Inc.", "Los Angeles", and "1 Listing St". A large watermark "PROPOSES ONLY" is visible across the document.

## zipLogix Digital Ink® Integration

Full zipLogix Digital Ink® integration allows zipLogix Digital Ink® users to:

- Set up the signature packet, including documents, signers and signature tags, in three easy steps, without leaving zipForm®
- Name signature submissions so that the signature packet is easy to identify in the future
- View the status of packets sent to zipLogix Digital Ink® and update signatures packets from within zipForm® Plus
- Review submission records for signatures of individual documents
- Automatically fills signer contact information directly from the Parties tab
- Save or print a complete history of the signature progress, including emails sent to signers
- (zipVault® subscribers only) Automatically receive a folder of signed PDF documents stored in the zipForm® Plus file when signing has been completed by all parties

The screenshot shows the zipLogix Digital Ink interface with a "Lead-Based Paint Disclosure" form. A green arrow labeled "Check Status" points to the "Check Status" button in the top toolbar. The form content includes a list of items and a "Lead Warning Statement".





Using the eSign button to connect directly to DocuSign® makes it easy for any agent to create professional, accurate signing packets for any client. Send forms for signatures without the hassle of new tabs, windows, or pop-ups. With a fully integrated signing experience, it is easier than ever to get to the closing table.



The screenshot shows the zipForm Plus interface with a document titled "123 Signa Way - Unnamed". The document content includes a "SPECIAL PROVISIONS" section and a signature line. Annotations with green arrows point to various features: "Messages" points to the recipient list, "Templates and tools" points to the toolbar, "Signature Tags" points to the tag selection menu, and "Send" points to the bottom action buttons.

## DocuSign® Integration

Complete DocuSign® and zipForm® Plus integration allows DocuSign® subscribers to:

- Set up the signature packet, including documents, signers and signature tags, in three easy steps, without leaving zipForm®
- Name signature submissions so that the signature packet is easy to identify in the future
- Check the status of packets sent to DocuSign® or review status of signatures at a glance from within zipForm® Plus
- View submission records for signatures of individual documents
- Automatically fills signer contact information directly from the Parties tab
- Save or print a history of the signing process
- (zipVault® subscribers only) Automatically receive a folder of signed PDF documents stored in the zipForm® Plus file when signing has been completed by all parties

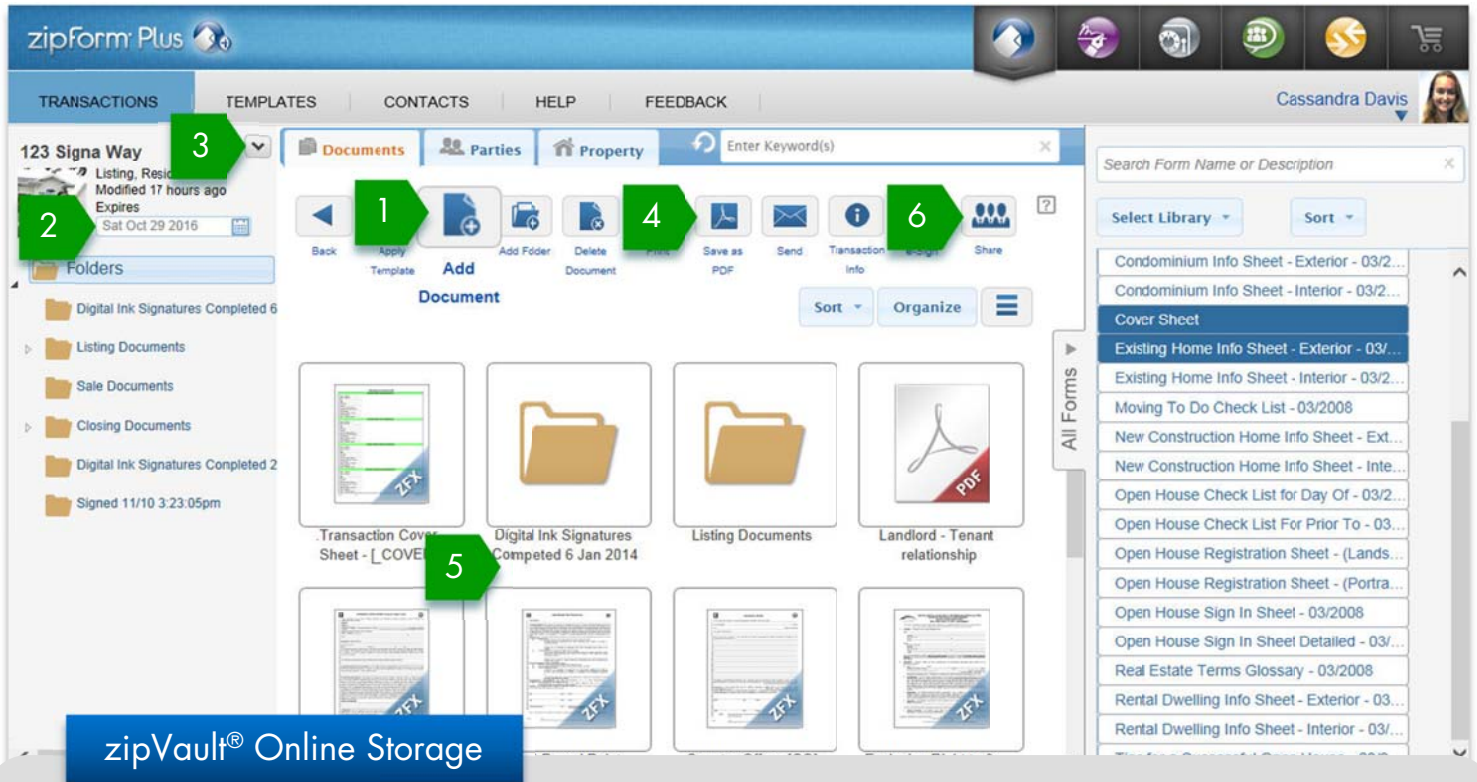
The screenshot shows the "123 Signa Way - Submissions" window. It contains a table with columns for Submission Name, Submission Date, Status, and a "Check Status" button. The table lists two submissions: one for "Listing Docs" with status "InProgress" and one for "Listing Document..." with status "Created".

Submission Name	Submission Date	Status	Check Status
Listing Docs	5 hours ago	InProgress	Check Status
Listing Document...	5 hours ago	Created	





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

Click **Add Document (1)** to upload a file from your computer. As soon as the first document is added, the zipVault® extended file storage is activated for the transaction. The transaction will be available on zipForm® Plus until it is deleted manually 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.

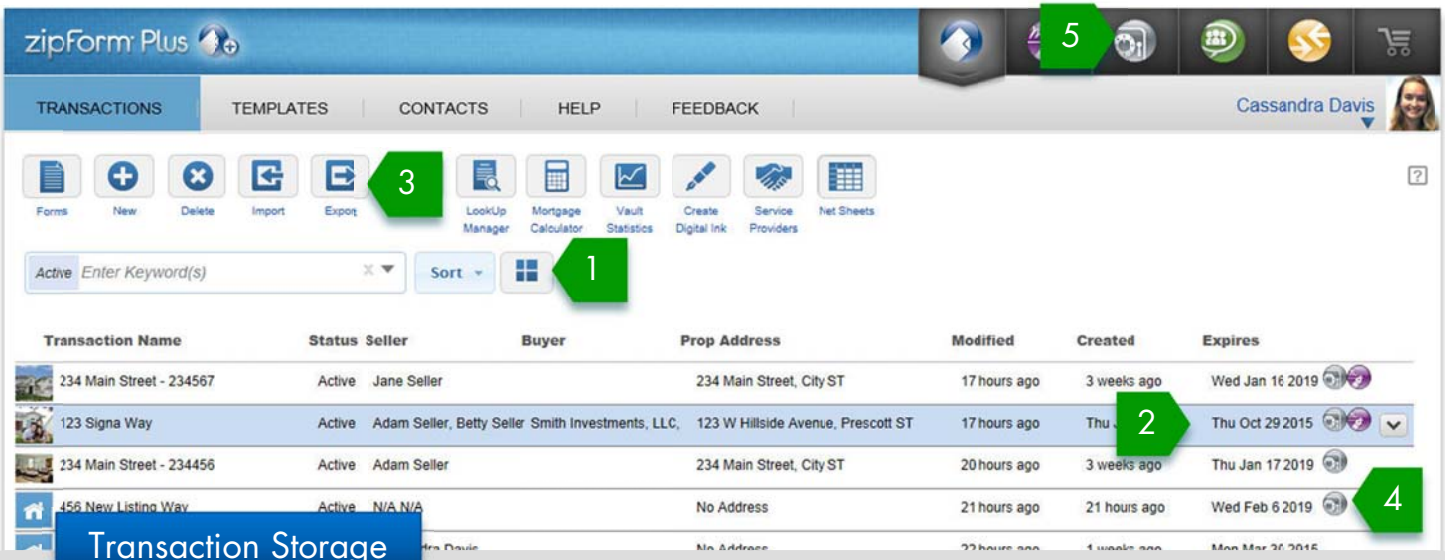
Documents can also be added to the file by using the Email to zipForm® or Fax Coversheet features on the advanced **File Menu (3)**. Unsigned forms can be preserved as part of the file for sharing or documentation using the **Save as PDF (4)** button, and saving selected forms to the file. Signed forms sent using the e-Sign button with DocuSign® or zipLogix Digital Ink®, 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 can be emailed, faxed, or included in eSign packets alongside forms. Documents can also be shared online using the **Share (6)** button. Use Share to send a link to view documents to anyone with an email address. It is a great way to share documents without worrying about email attachment size.

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.



## Transaction Storage

Browse TRANSACTIONS in **Icon View** for large pictures, easy identification, and brief details about the file. Switch to **List View** to see additional transaction details, including file expiration dates. The **Icon View/List View Button (1)** located next to your sort options will change your viewing preference for this page. zipForm® will remember this preference until you change it again.

List view makes it easy to see the **Expiration Date (2)** for all files. The expiration date tells you how long the file will be stored online. 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.

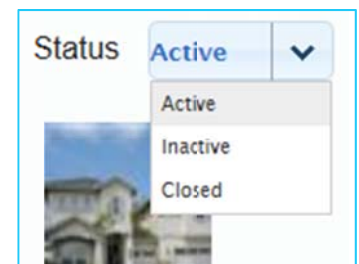
Open a transaction to update the expiration date. Files with additional documents stored in zipVault® will have an expiration date under the file name when you open the file. Click the calendar button next to the expiration date inside the file to change the date. Files that only have live forms and do not have additional documents are stored for fourteen months after the date they were last edited. Open the file and change text inside one or more forms, or add a document to the file, in order to extend the expiration date.

Files with the **zipVault® icon (4)** contain documents stored in zipVault®. Click the **zipVault® product button (5)** at the top of zipForm® Plus to sort by zipVault® transactions.

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**

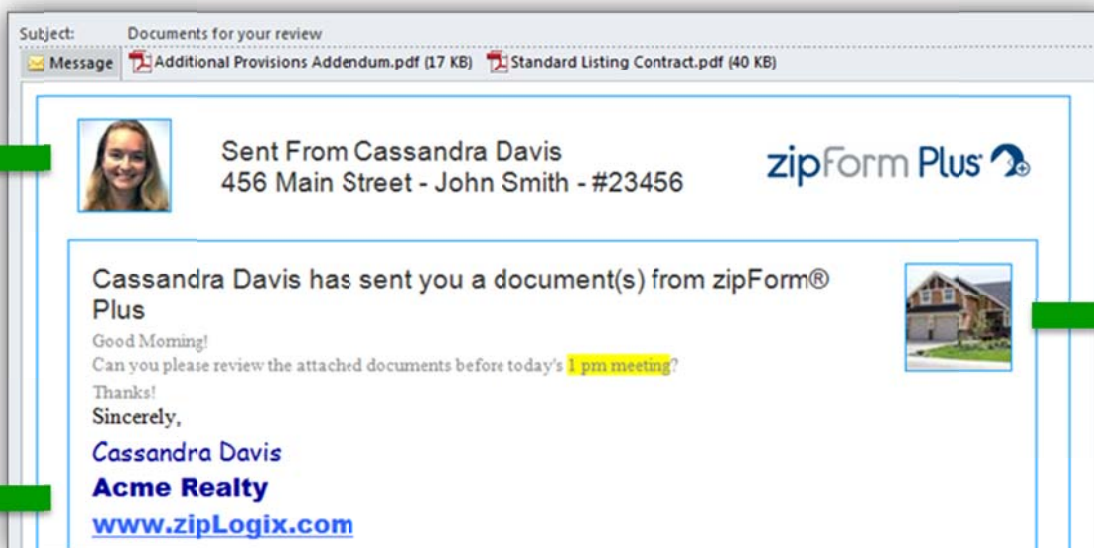
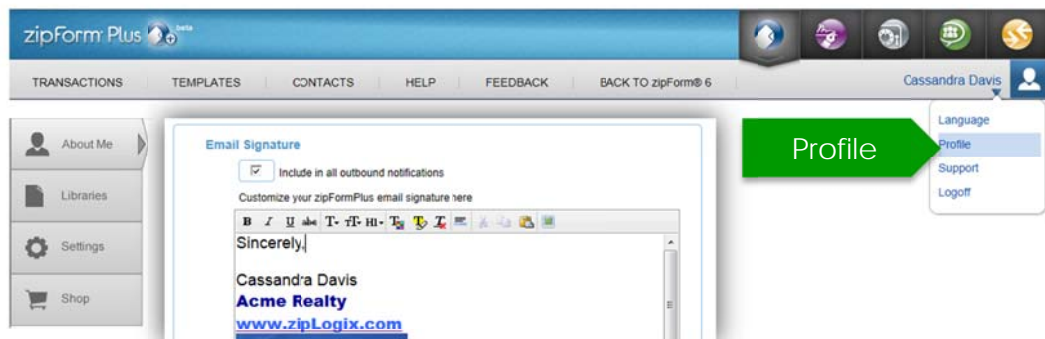
Inactive and closed transactions will not appear on your main TRANSACTIONS page by default. Search for Inactive, Closed, or All files by clicking the arrow on the search (Enter Keywords) field on the TRANSACTIONS page, and selecting to search for Closed, Inactive, or All files.



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

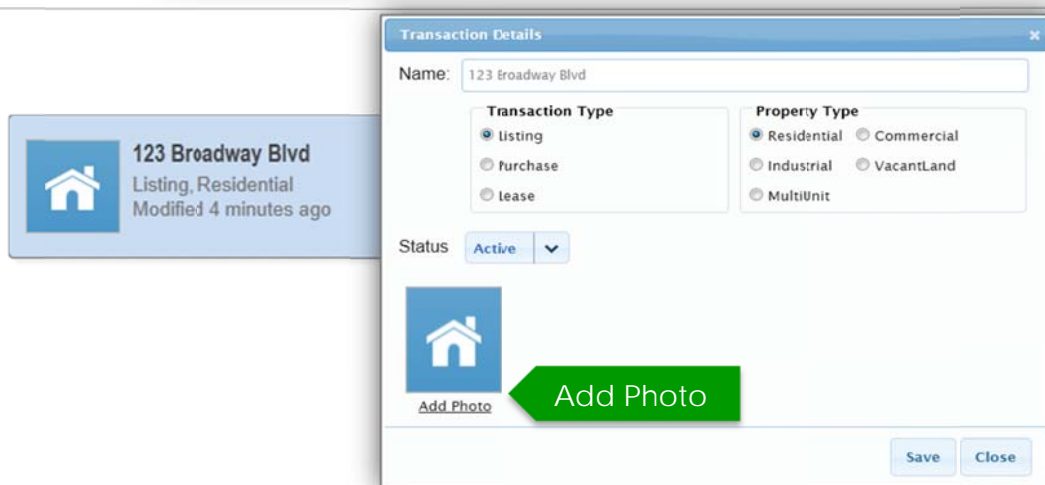
A personal profile image and email signature can be added through the About Me section of the zipForm® Plus Profile. Enter updates and click Save to save changes.



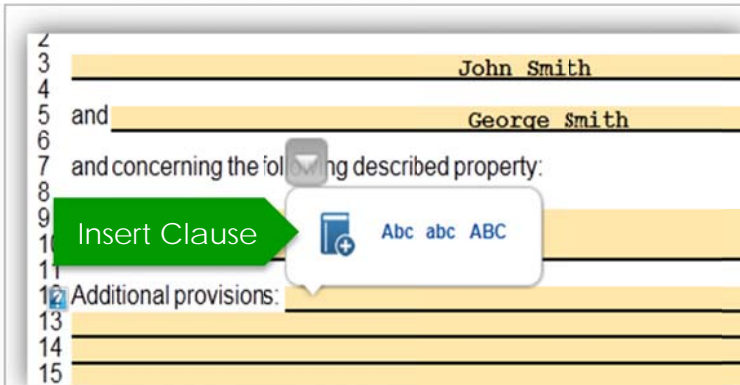
## Add Property Image

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.



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



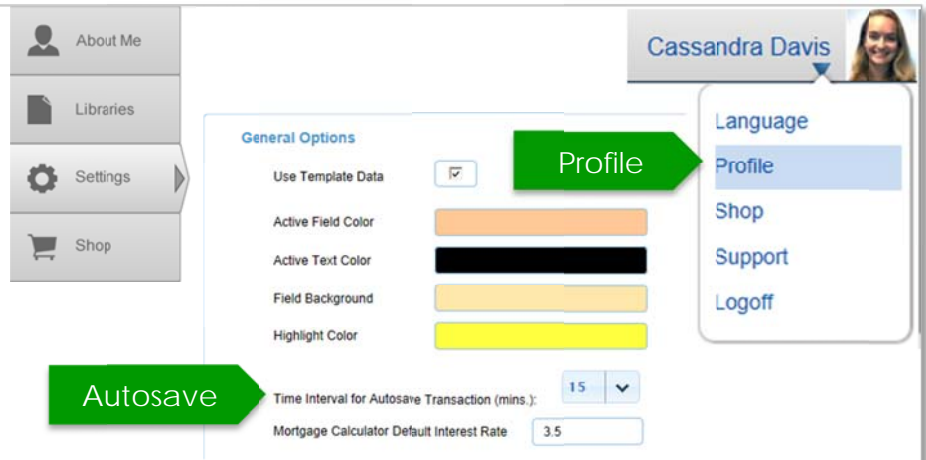
## Tip 1: Save clauses and use them in text fields

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: Set zipForm® Plus as your default

At the bottom of your Profile section for **Settings**, you can check a box that will make zipForm® Plus your default view when you sign in! Save your changes, and this setting will remain until you change it again.

