

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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Secure e-Signature Packets


In the manner according to said law. SELLER CERTIFIES THAT SELLER HAS A TRUE AND CORRECT COPY OF THIS CONTRACT, SELLER FURTHER CERTIFIES THAT IT HAS FULL AUTHORITY TO EXECUTE THIS CONTRACT. SELLER UNDERSTANDS THAT IF SELLER CONVEYS HIS/HER INTEREST IN THIS LISTING OR IF SELLER REVOKES THE UNDERSIGNED BROKER'S INTEREST IN THIS LISTING, HE ABOVE STATED COMMISSION.

  2014-07-22 17:43 GMT

Signature of Seller John Smith Date

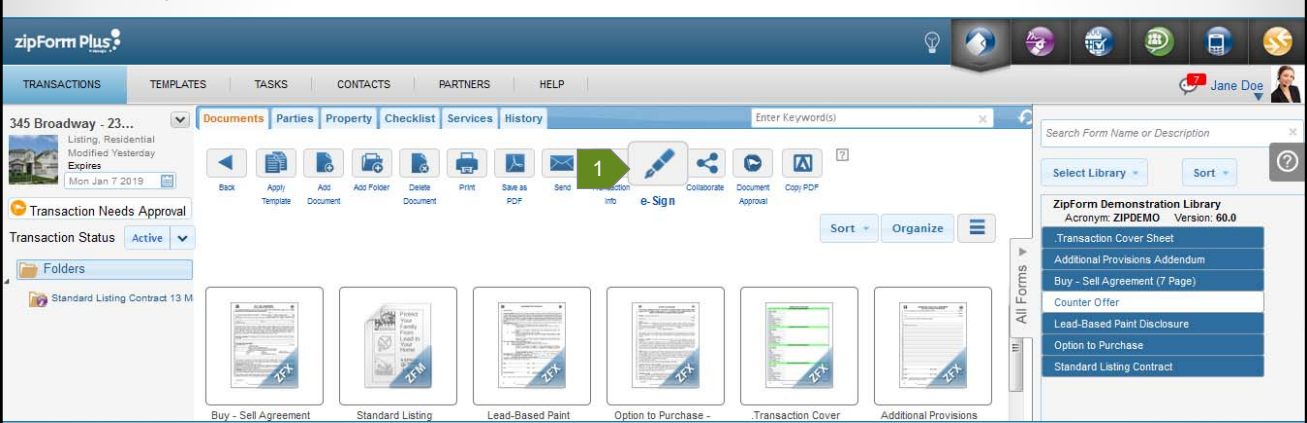
- Confirms signatures are valid each time the PDF opens
- Prevents tampering with the final contract
- Visible through the free Adobe Acrobat Reader and compatible viewers

*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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Select Forms to Sign

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

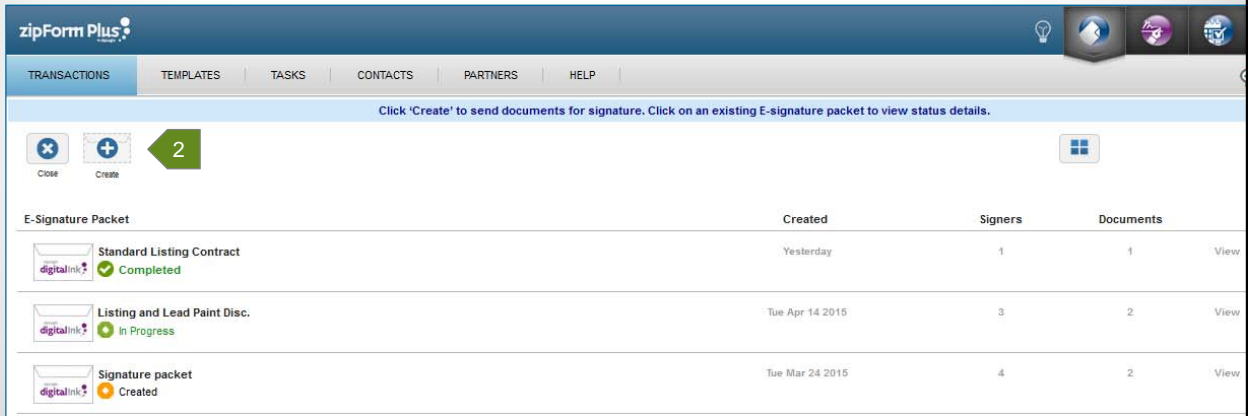


The screenshot shows the zipForm Plus web application interface. At the top, there's a navigation bar with tabs for TRANSACTIONS, TEMPLATES, TASKS, CONTACTS, PARTNERS, and HELP. Below this is a search bar and a user profile for Jane Doe. The main area displays a document viewer for a file named '345 Broadway - 23...'. A toolbar at the bottom of the viewer includes buttons for Back, Apply, Add, Add Folder, Delete, Print, Save as PDF, Send, e-Sign (highlighted with a green arrow), Collaborate, Document, and Copy PDF. Below the toolbar, there are six document thumbnails: Buy - Sell Agreement, Standard Listing, Lead-Based Paint, Option to Purchase, .Transaction Cover, and Additional Provisions. On the right side, there's a search bar and a list of forms from the 'ZipForm Demonstration Library', including Transaction Cover Sheet, Additional Provisions Addendum, Buy - Sell Agreement (7 Page), Counter Offer, Lead-Based Paint Disclosure, Option to Purchase, and Standard Listing Contract.

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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

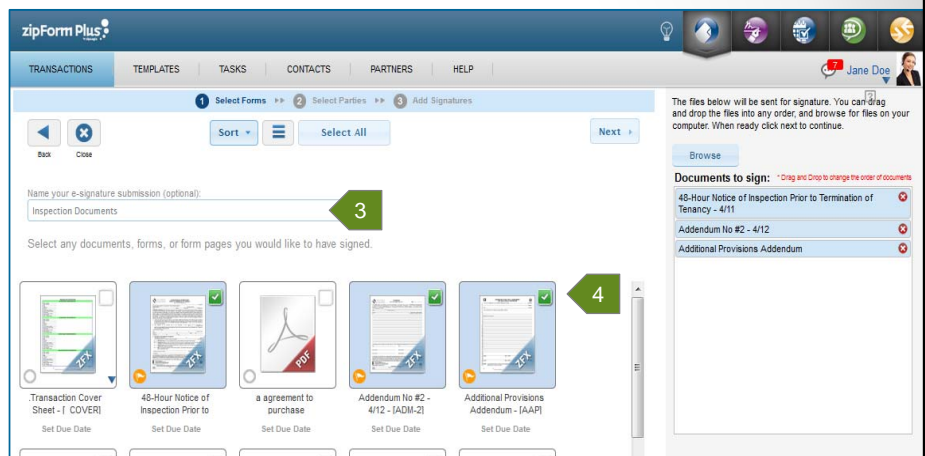


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Select Forms to Sign

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.

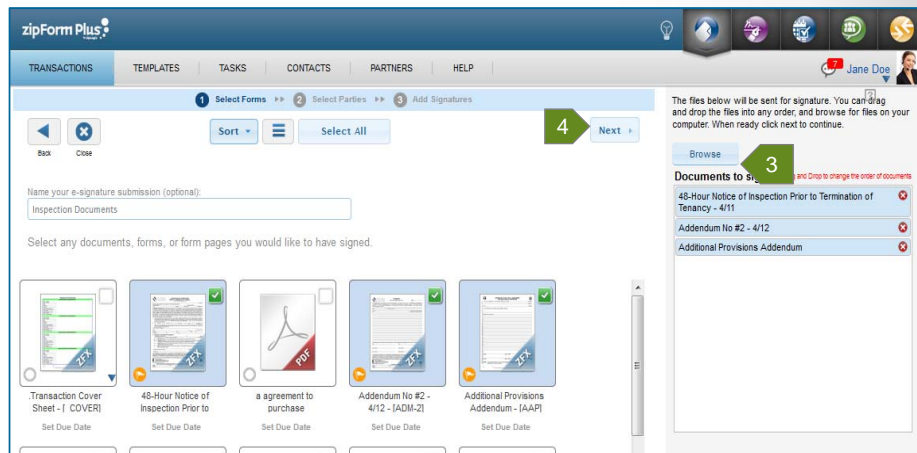


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Select Forms to Sign

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

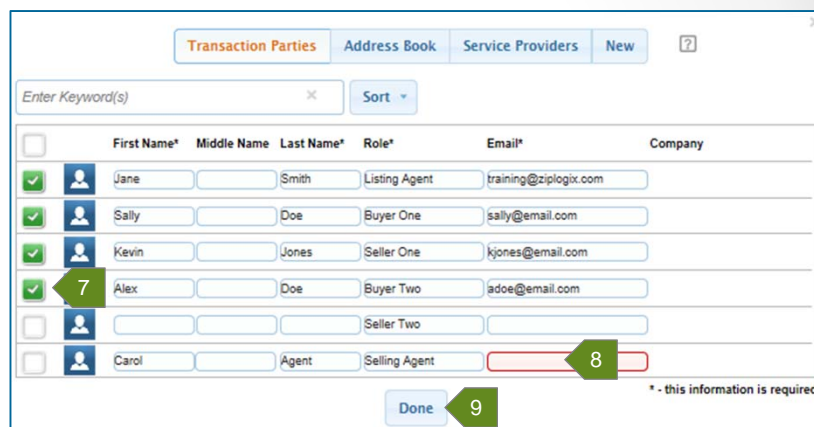


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Select Signers

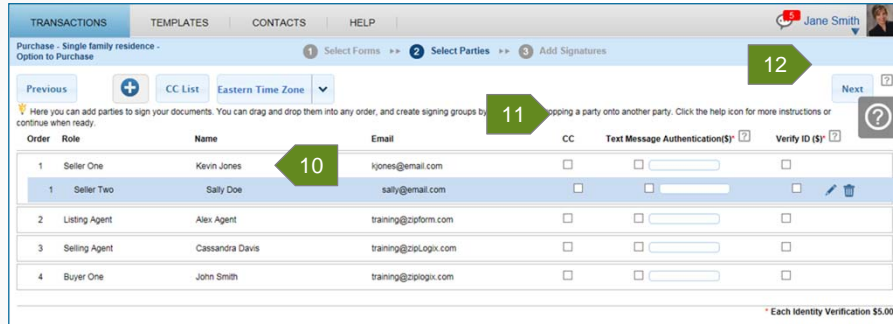
- Click to **check the check box** to select signers
- Enter required information for signers, such as email address or role (their role determines what signature fields they will be prompted to complete)
- Click **Done**



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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**



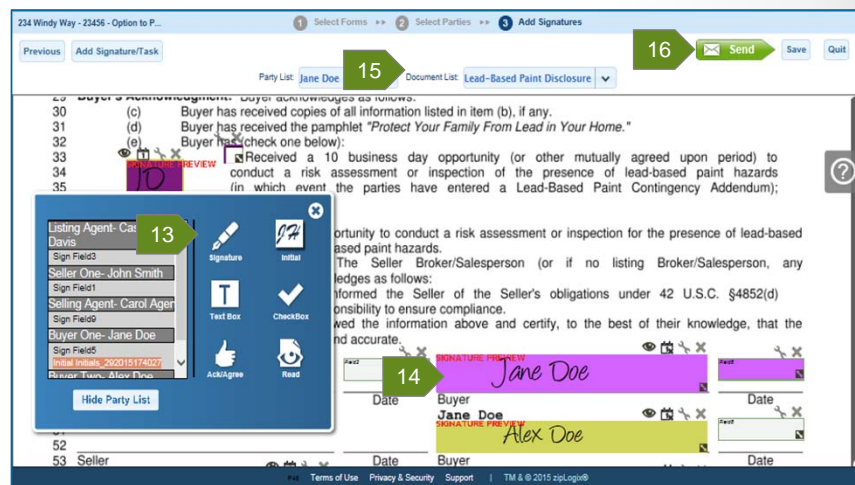
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Add Tasks




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.

Purchase - Single family residence ...

1 Select Forms >> 2 Select Parties >> 3 Add Signatures

Previous Add Signature/Task Send Save Quit

Party List: Kevin Jones Document List: Additional Provisions Adde...

SELLER ONE

Seller One - Kevin Jones
Sign Field3

Seller Two - Sally Doe
Sign Field5

Listing Agent - Alex Agent

Selling Agent - Cassandra Davis

Buyer One - John Smith
Sign Field1

Hide Party List

Send Invitation

When you are ready to start the signing process, simply click the Send Now button below. You can edit the Title and Email Message if you would like to customize the invitation sent to your parties.

Title
Purchase - Single family residence

Email Message
Hi!

Please click the link below to create your signature in zipLogix Digital Ink and click to sign these contracts we reviewed on Tuesday.

Send Now


BUYER ONE

_____, between

_____, (Seller)

_____, (Buyer)


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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®.

Modify

Cancel

Return to zipForm®

Purchase - Single family residence ...

Modify Submission Cancel Submission Close

Running


Party Information View History

Order	Role	Name	Email	Registration	Transaction Status	
1	Seller One	Kevin Jones	kjones@email.com	Pending	Action Required	
1	Seller Two	Sally Doe	sally@email.com	Pending	Action Required	
2	Listing Agent	Alex Agent	training@zipform.com	Pending	Action Required	

Document(s) Download All

Option to Purchase VIEW PARTICIPANTS	View Download
Lead-Based Paint Disclosure VIEW PARTICIPANTS	View Download
Additional Provisions Addendum VIEW PARTICIPANTS	View Download

You can email parties, download documents, and view the history of events to this point. You can also modify the transaction by clicking Modify above.



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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:

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