

Creating and Applying E-Signature Templates within zipForm® Plus

Revised: May 7, 2018



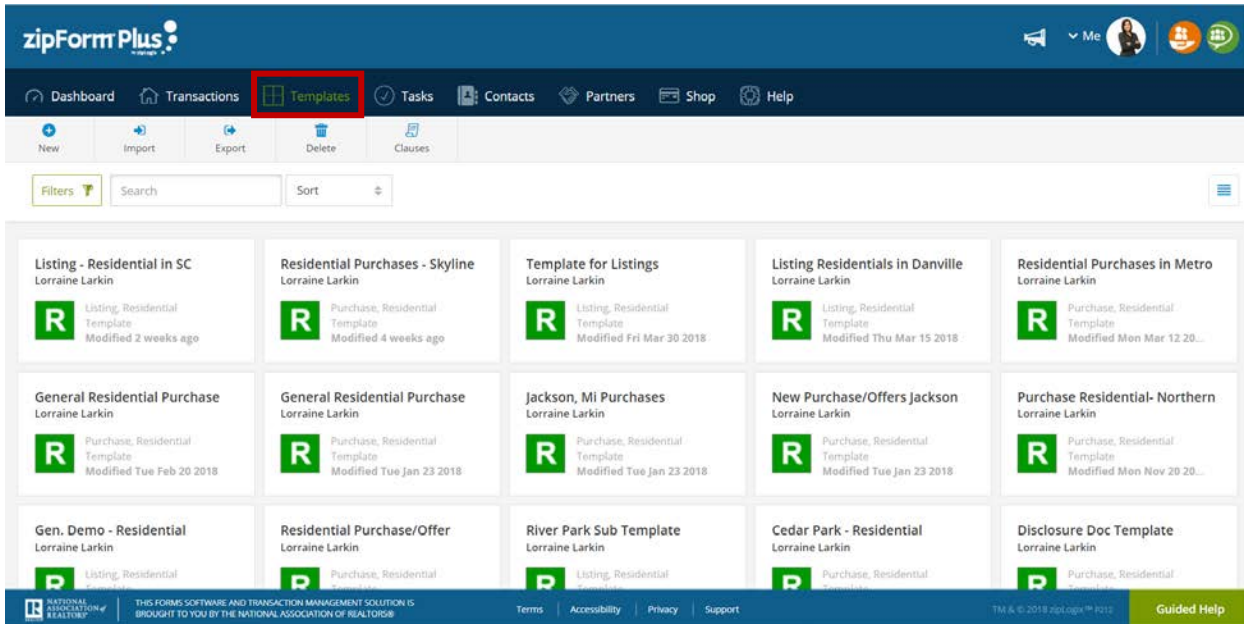
zipLogix Academy™



CREATING AN E-SIGN TEMPLATE

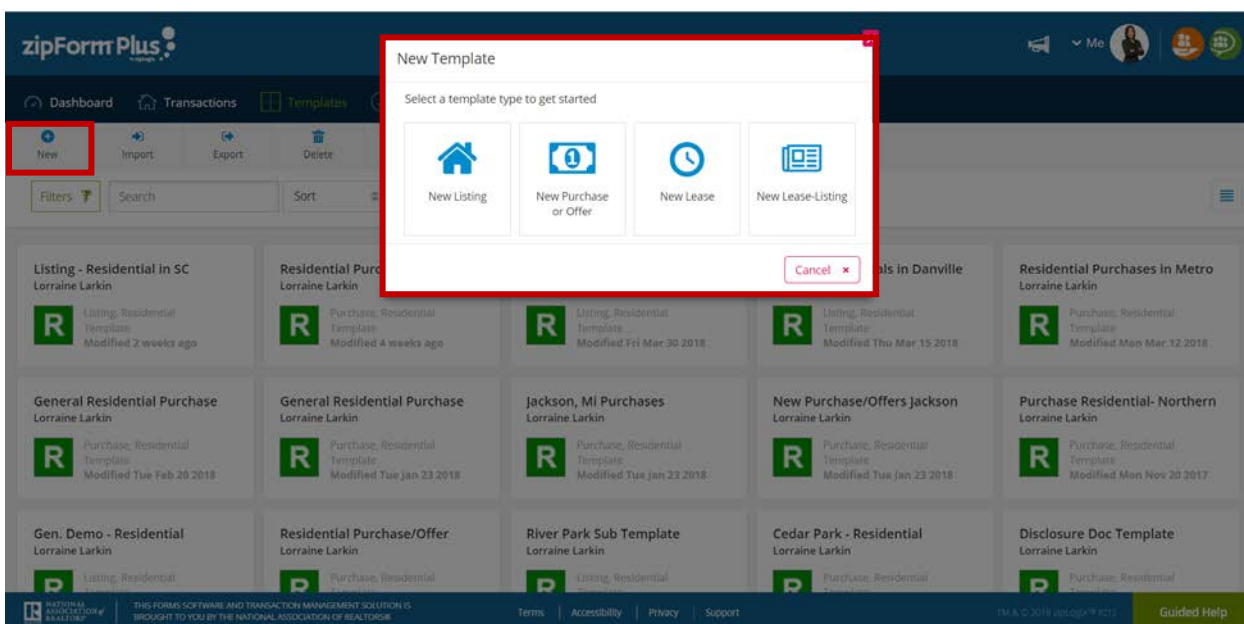
Step 1:

Create an E-Sign Template by clicking **Templates** on the zipForm® Plus navigation bar.



Step 2:

Click **New** and establish the template type.





Step 3:

Name the template, select Property Type, Scope, Auto Apply, and Select any additional templates, if needed.

Click **Save**.

******(Please note: this is a Broker account; agents will not see the “Compliance Options” preferences).

Step 4:

Inside of the new template, under the **Documents** tab, open the forms library and select any forms to be added to this template by clicking those form names.



Step 5:

Fill out added form(s) with information that can be repurposed each time this template is used. Click **Save** on the toolbar.

The screenshot shows the zipForm Plus web application. The top navigation bar includes links for Dashboard, Transactions, Templates, Tasks, Contacts, Partners, Shop, and Help. Below this is a secondary bar with 'Back' and 'My forms'. The main toolbar contains various action buttons: Fullscreen, Notes, Clause Manager, **Save** (highlighted with a red box), Print, Email, Save as PDF, Fastfill, N/A Fill, Preview, Spelling, Intellicopy, Highlight, Strikeout, Undo, Redo, Photos, and Lookup Field Manager. The central area displays a 'LISTING CONTRACT' form with several numbered sections containing text and input fields. The footer includes the National Association of Realtors logo, copyright information, and links for Terms, Accessibility, Privacy, Support, and Guided Help.

Step 6:

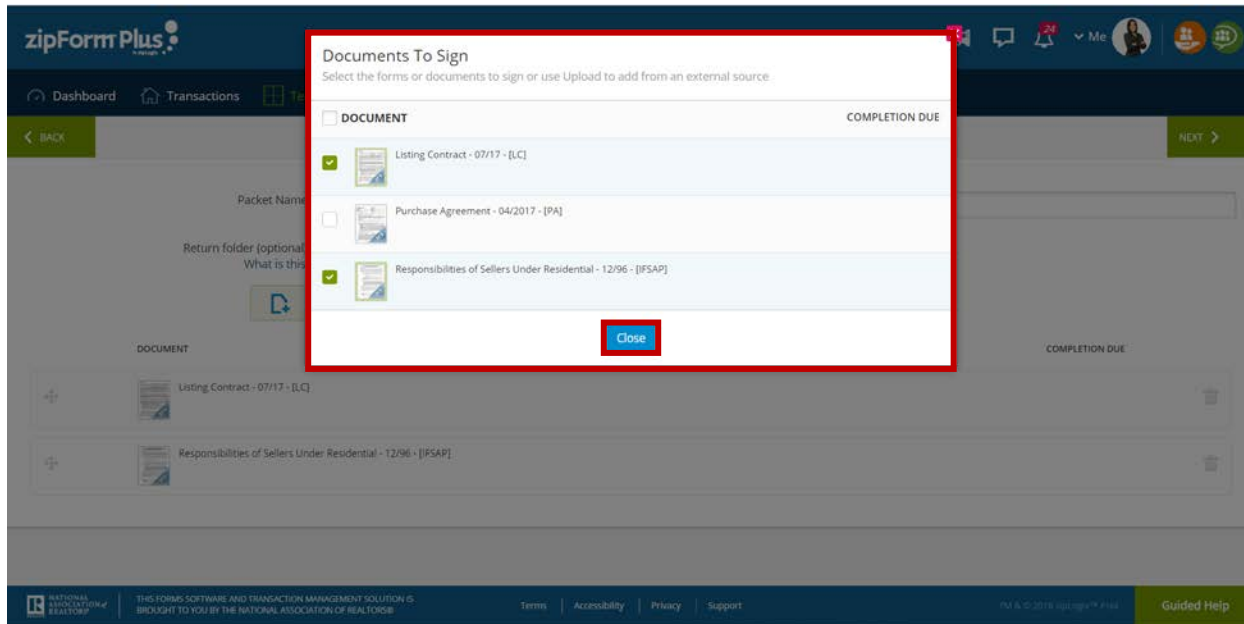
Once forms are filled, navigate two tabs to the right of **Documents** to the tab which reads: **E-Sign Templates**. Click the **New** icon in the upper left.

This screenshot shows the zipForm Plus interface after navigating to the 'E-Sign Templates' tab. The top navigation bar remains the same. The secondary bar now shows 'Back', a green 'R' icon, and a dropdown menu for 'Listing Residential Transactions'. Below this, a tab bar includes 'Parties', 'Documents', 'Checklist', and **E-Sign Templates** (which is the active tab). In the upper left corner of the main content area, a **New** icon (a circle with a plus sign) is highlighted with a red box. The rest of the page is currently blank, indicating a new template is being created.



Step 7:

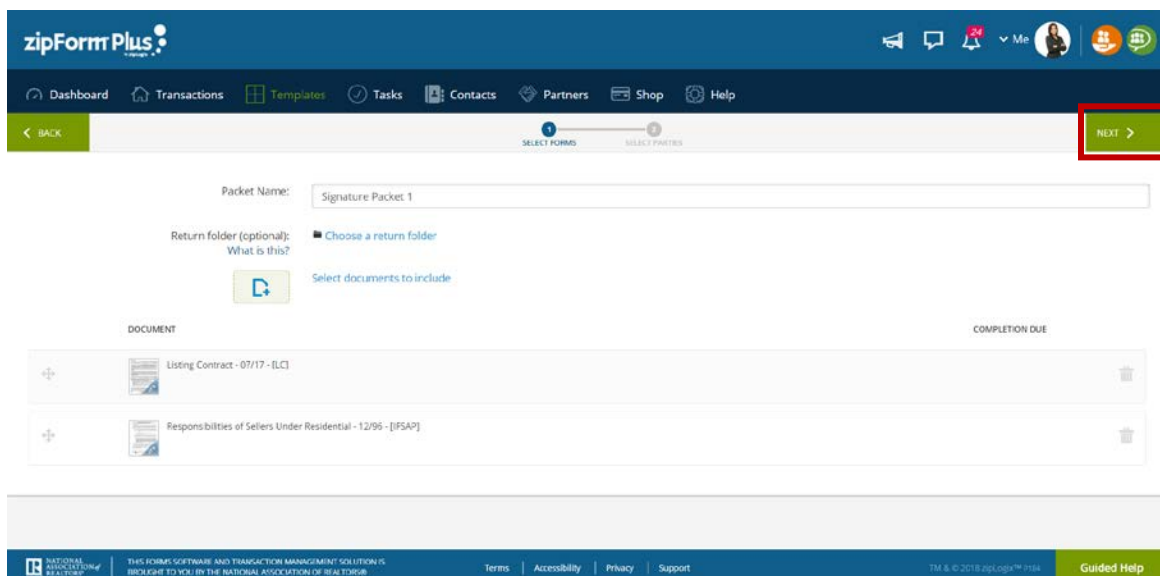
From the window, click the checkbox corresponding with any form(s) and/or document(s) that need to be included in this **E-Sign Template**. Click **Close** when finished.



Step 8:

Once forms/documents are selected, click **Next**.

******(Note: Optionally, users may give the e-Sign packet a name, if they wish).





Step 9:

Select parties to add to the E-Sign Template by clicking on their corresponding checkboxes. Make sure that first name, last name, role, and email are all included for E-Sign Template parties. Then, click **Close**.

	FIRST NAME	MIDDLE NAME	LAST NAME	ROLE	EMAIL	COMPANY
<input type="checkbox"/>	Lorraine		Larkin	Listing Agent	ziplogixagent@gmail.com	
<input checked="" type="checkbox"/>	Lorraine		Larkin	Listing Broker	ziplogixagent@gmail.com	Lorraine Larkin
<input type="checkbox"/>				Seller One		
<input type="checkbox"/>				Seller Two		
<input type="checkbox"/>				Buyer One		
<input type="checkbox"/>				Buyer Two		
<input type="checkbox"/>				Second Realtor		

Step 10:

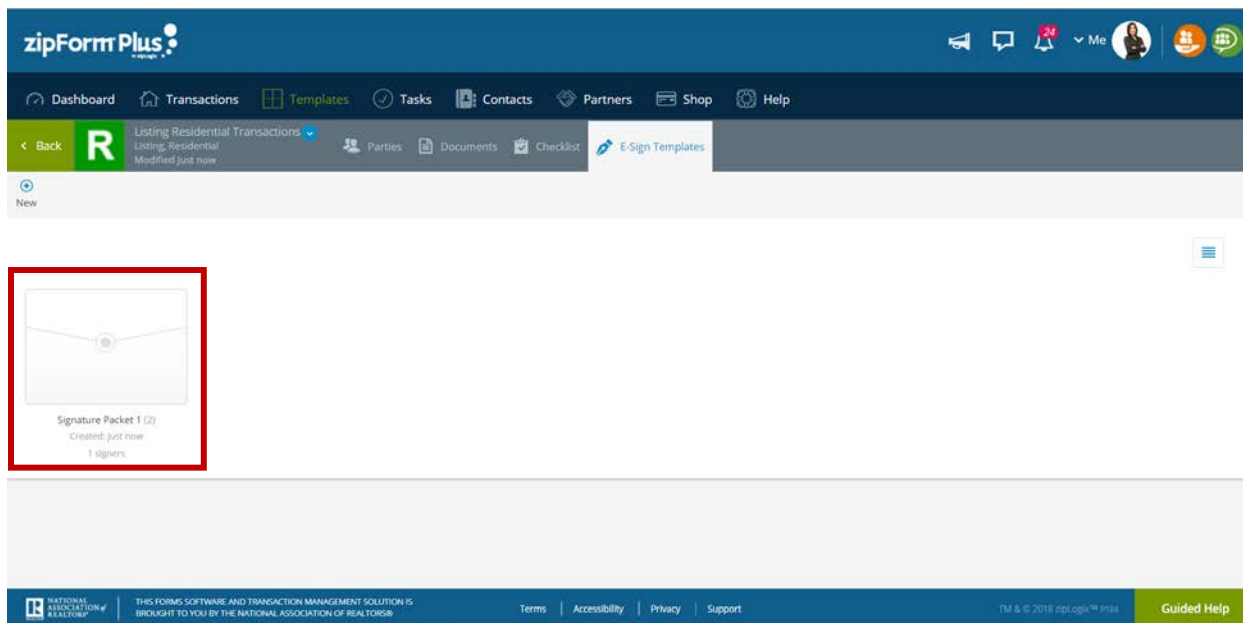
Confirm that E-Sign Template party information is correct. If so, click **Save**, in the upper right.

	FIRST NAME	MIDDLE NAME	LAST NAME	ROLE	EMAIL	COMPANY
<input type="checkbox"/>	Lorraine		Larkin	Listing Agent	ziplogixagent@gmail.com	
<input checked="" type="checkbox"/>	Lorraine		Larkin	Listing Broker	ziplogixagent@gmail.com	Lorraine Larkin
<input type="checkbox"/>				Seller One		
<input type="checkbox"/>				Seller Two		
<input type="checkbox"/>				Buyer One		
<input type="checkbox"/>				Buyer Two		
<input type="checkbox"/>				Second Realtor		



Step 11:

The new E-Sign Template should appear in the form of a Signature Packet on the left side of the screen. To create an additional E-Sign Template, click **New** in the upper left of the screen, and repeat this same process.

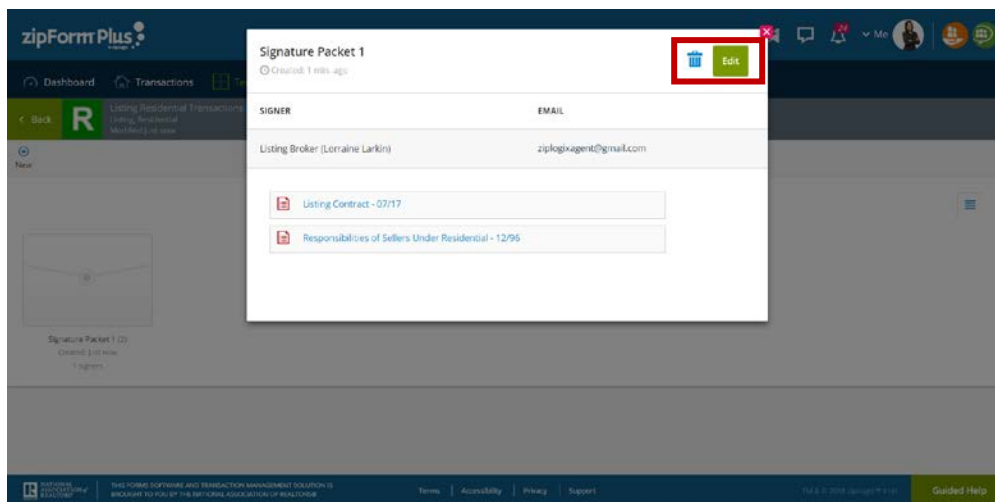


Step 12:

To view further details about a created packet, or to change/edit information, click on the packet image to open it, then click **Edit** in the upper right.

Users may also view which forms/documents were added to the E-Sign Template via this window.

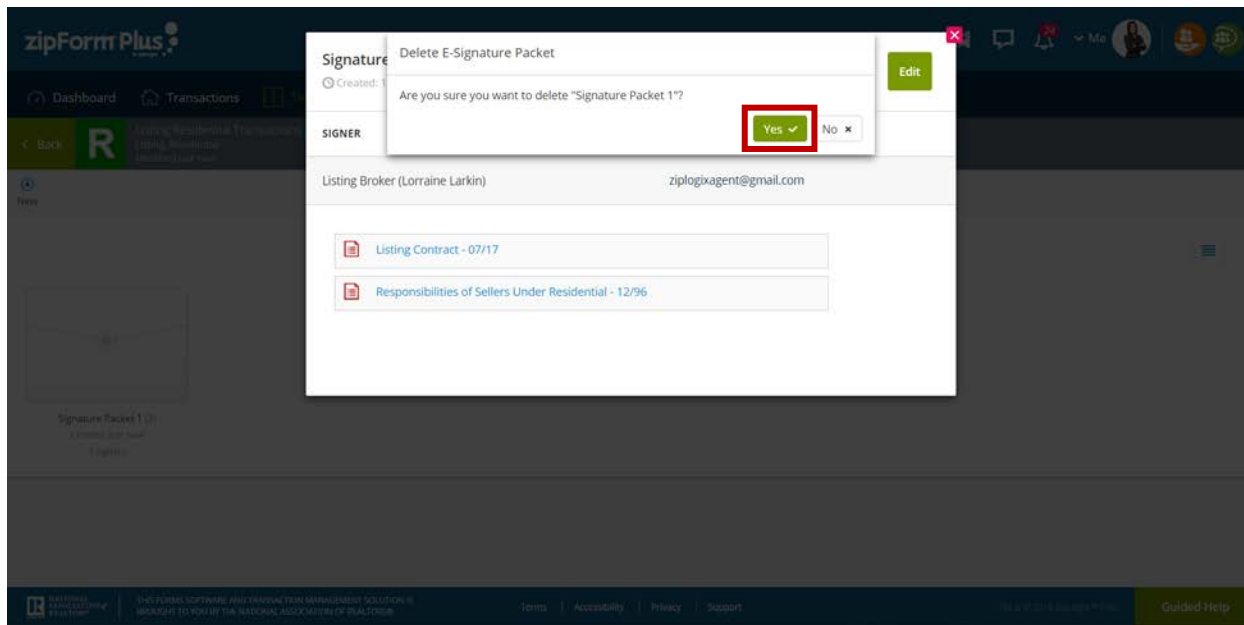
To delete an E-Sign Template, click the **Trash** icon in the upper right of the details window.





Step 13:

To confirm deletion of an E-Sign Template, click **Yes** from the pop-up that appears after clicking the **Trash** icon.

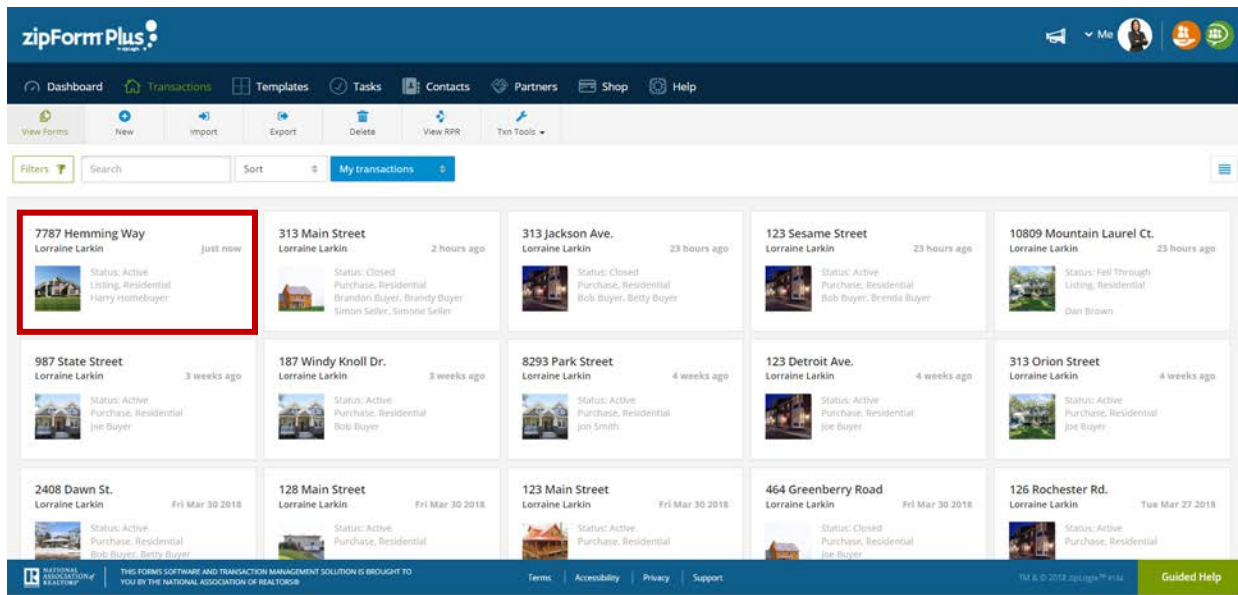




APPLYING AN E-SIGN TEMPLATE

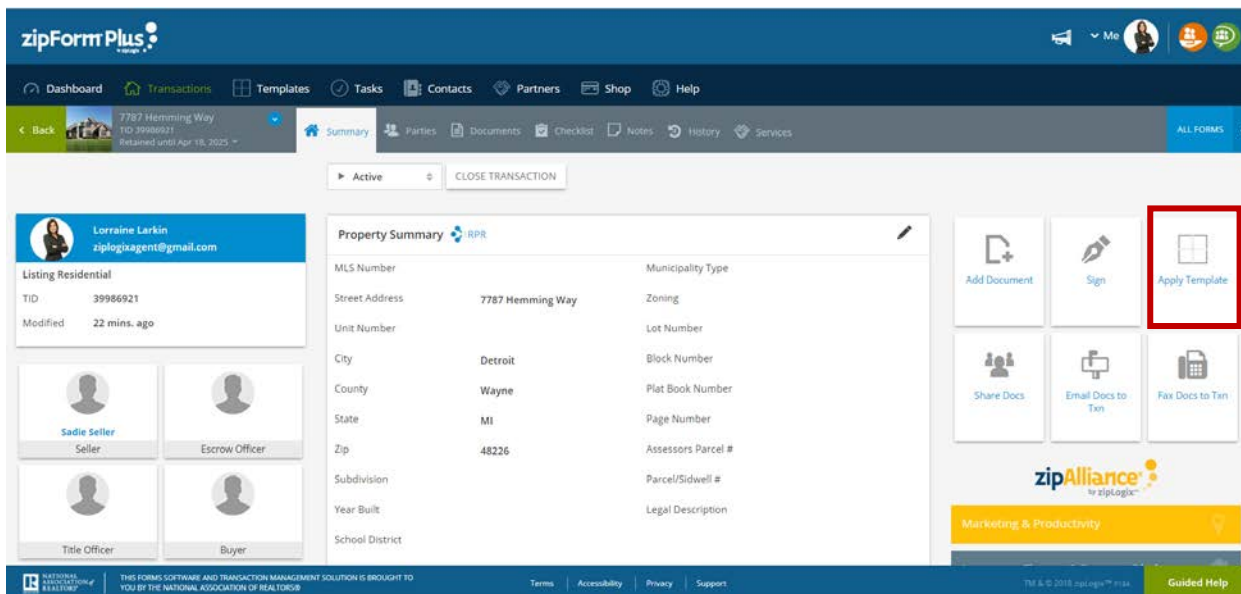
Step 1:

Click on the transaction to send for signing.



Step 2:

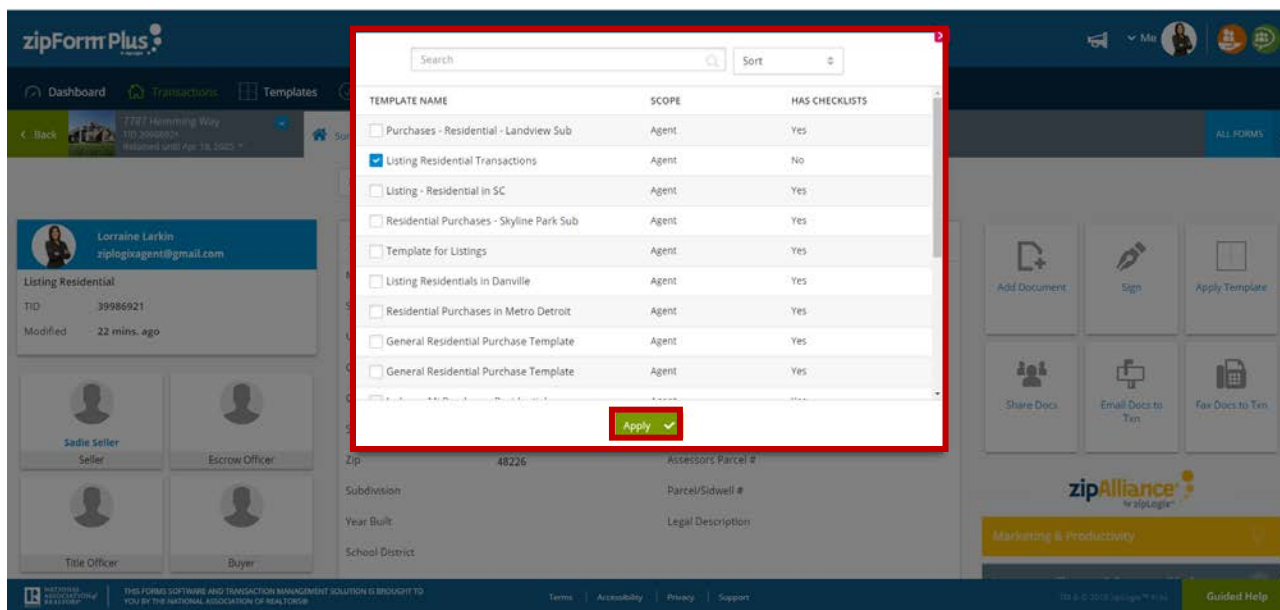
Click **Apply Template** to add the template containing the E-sign template to this transaction.





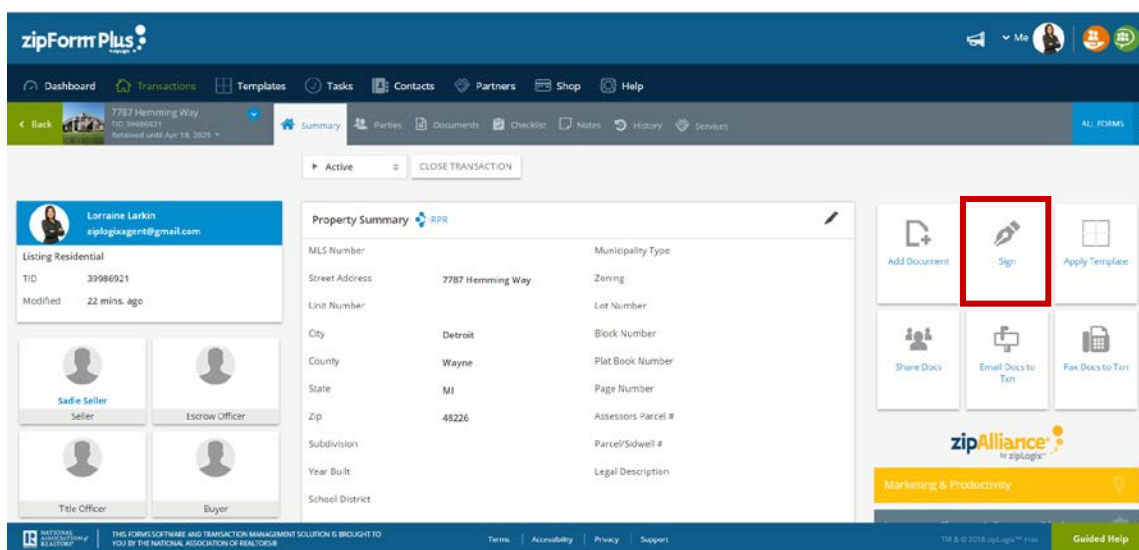
Step 3:

Select the template to be applied to the transaction by clicking the corresponding checkbox. Click **Apply**. The template is now added to the transaction.



Step 4:

Once the template has been applied, click **Sign** from the **Transaction Summary** (or **Sign** from the toolbar on the **Documents** tab).

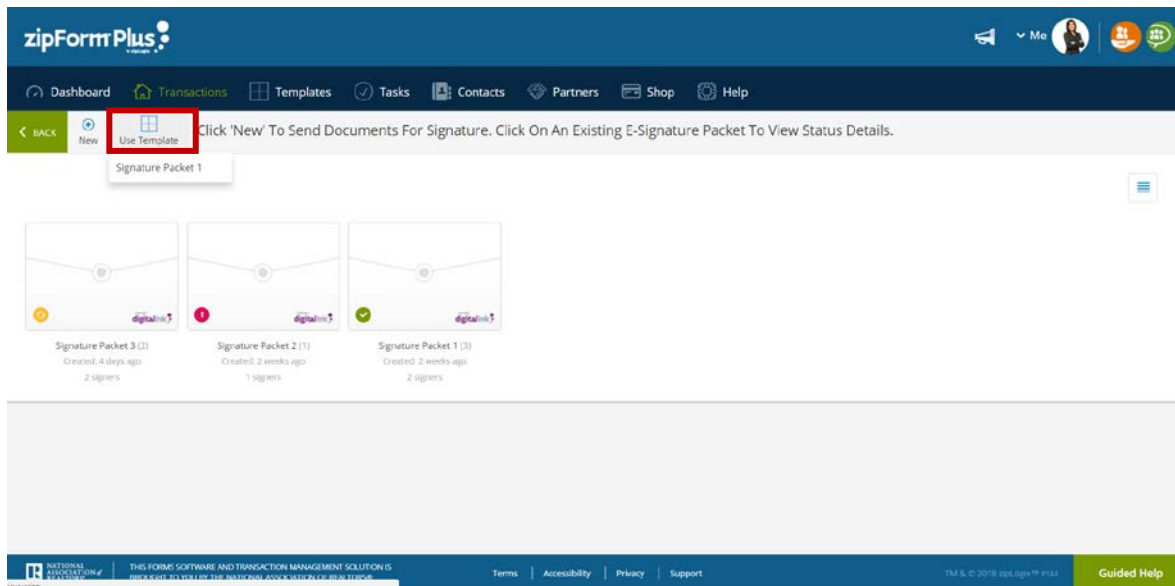




Step 5:

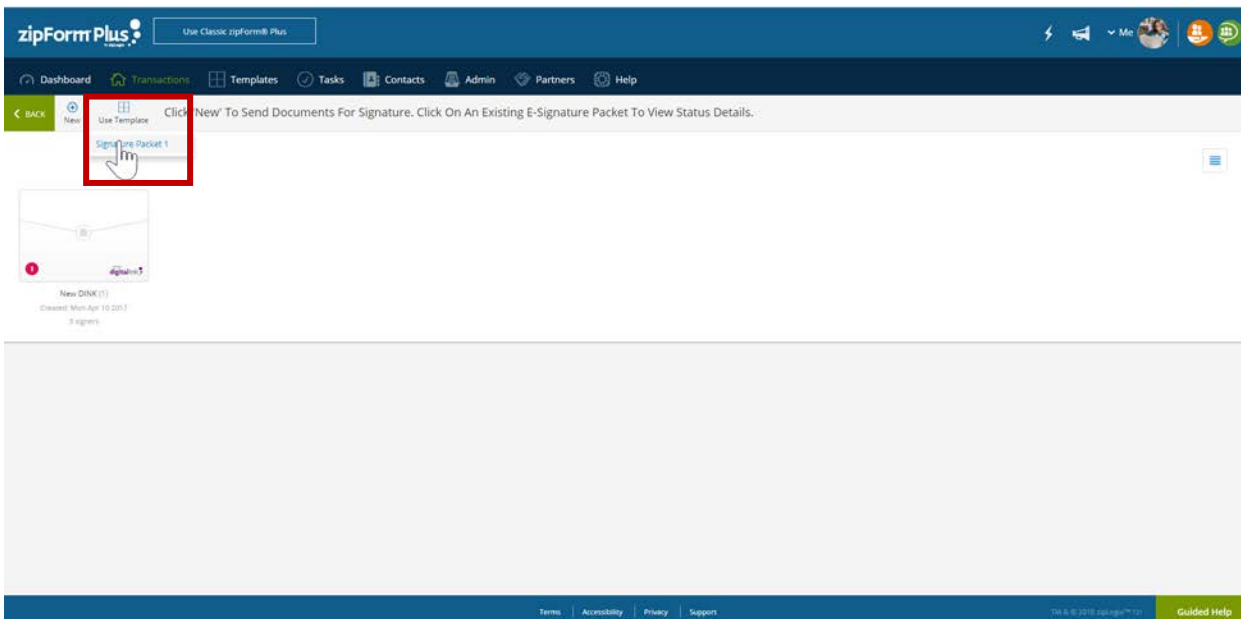
Click the Use Template icon in the upper left.

(Note: to create a regular E-Signature packet without a template, click **New).



Step 6:

Select the E-Sign Template to be used from the dropdown options.





Step 7:

User will be launched into regular E-Sign process. Forms will already be added from the template. User may add additional forms, if necessary. Click **Next** when finished with this step.

DOCUMENT	COMPLETION DUE
Listing Contract - 07/17 - [LC]	
Responsibilities of Sellers Under Residential - 12/96 - [IFSAP]	

Step 8:

In step two of the E-Sign packet creation process, signers will already be added, per the E-Sign Template. Users may add additional signers, if needed. Click **Close** when done adding parties. Then, click **Next**.

NAME / ROLE	EMAIL
Jane	ziplogixagents@gmail.com
Lorraine	ziplogixagents@gmail.com
Seller Broker	ziplogixagents@gmail.com
Seller Two	
Second Realtor	
First Realtor	
Sadie	sadies@gmail.com
Buyer/Tenant 2	

**Step 9:**

Review forms/documents to ensure proper pre-tagging, as normal. When finished, click **Send** from the upper right, and then **Send Now** to confirm and send the invitation to sign.

The signing process is not affected by this release.

7787 Hemming Way - Signature Packet 1

BACK SELECT FORMS SELECT PARTIES ADD SIGNATURES SEND

Lorraine Larkin
Listing Broker
ziplogixagent@gmail.com

Listing Contract - 07/17

Zoom

Document Fields

LISTING CONTRACT

1. To Lorraine Larkin, (Broker). In consideration of Broker's agreement to use Broker's efforts to find a Buyer, negotiate with prospective Buyers, and arrange for closing documents, statements and attend to closing details. Seller hereby grants to Broker the exclusive right to sell from this date to _____ 11:00 p.m., the property address 7787 Hemming Way or legal description/tax ID: _____.

2. It is understood that Broker ☐ will ☐ will not distribute the listing information through the Jackson Multiple Listing Service ("JMLS"), a wholly-owned subsidiary of the Jackson area Association of REALTORS® ("JAAR"), the Great Lakes Repository and the MLS of _____. Participation in JMLS, Internet, and E-Commerce: Seller authorizes Broker to offer the property for sale through JMLS, all REALTOR® sponsored websites and other mediums of electronic communication. To Opt Out please choose one of the following: ☐ Option A: I have advised my Broker or sales agent that I do not want the listed property to be displayed on the Internet. ☐ Option B: I have advised my Broker or sales agent that I do want the address of the listed property to be displayed on the Internet. Furthermore, I understand and acknowledge that if I have selected Option A, consumers who conduct searches for listings on the internet will not see information about the listed property in response to their searches.

2. All buildings, fixtures, improvements, built-in appliances, carpeting, window treatments and landscaping are included in the purchase.