Creating and Applying E-Signature Templates

within zipForm® Plus

Revised: May 7, 2018
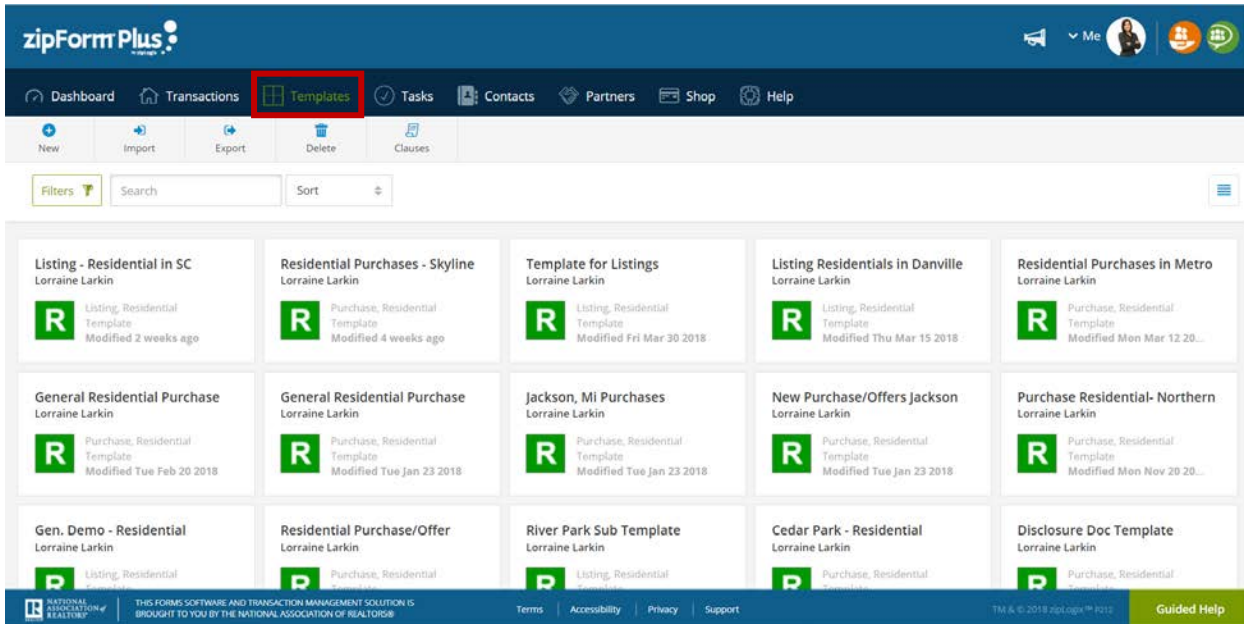
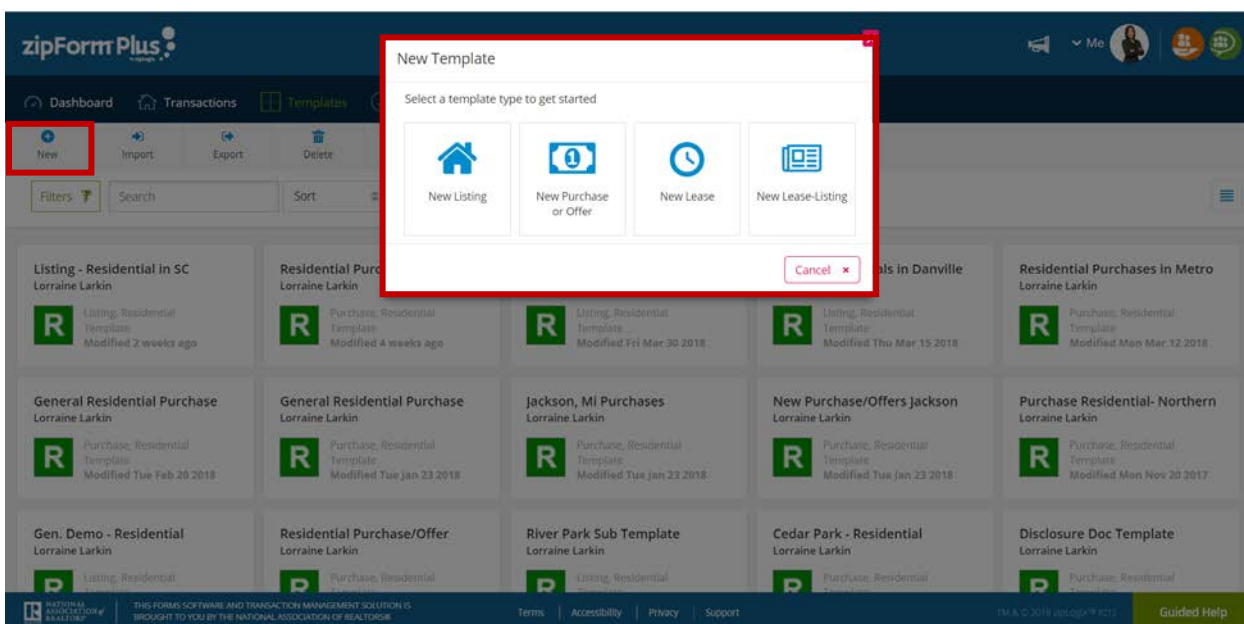zipLogix Academy

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.
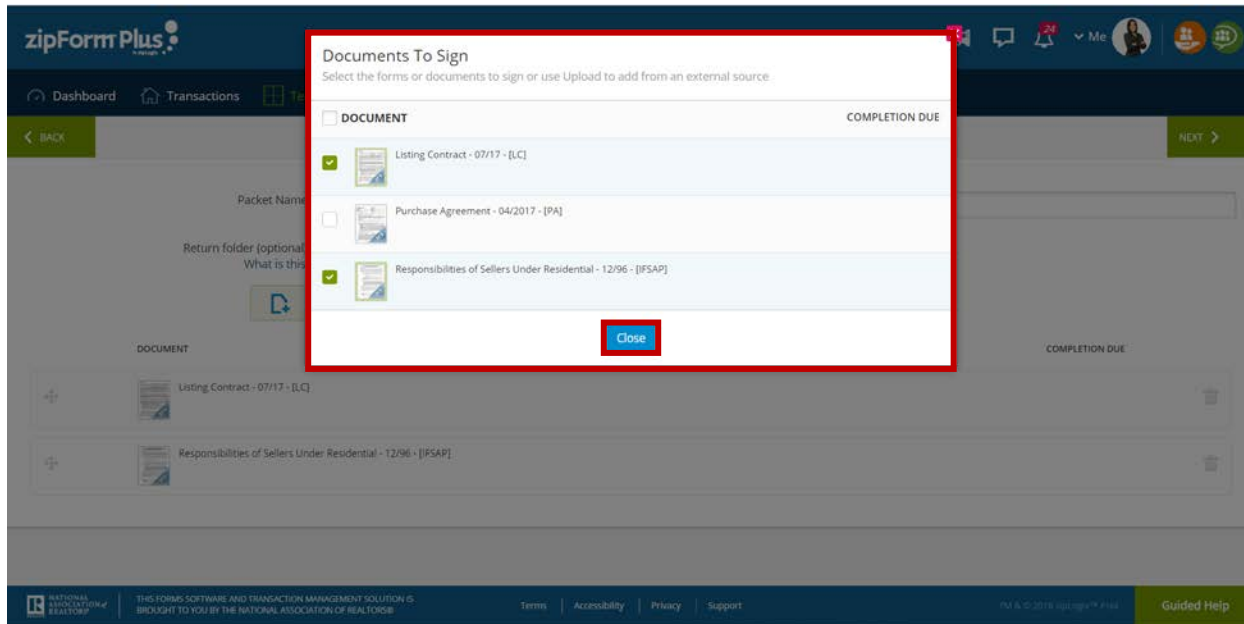

Step 6:

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.
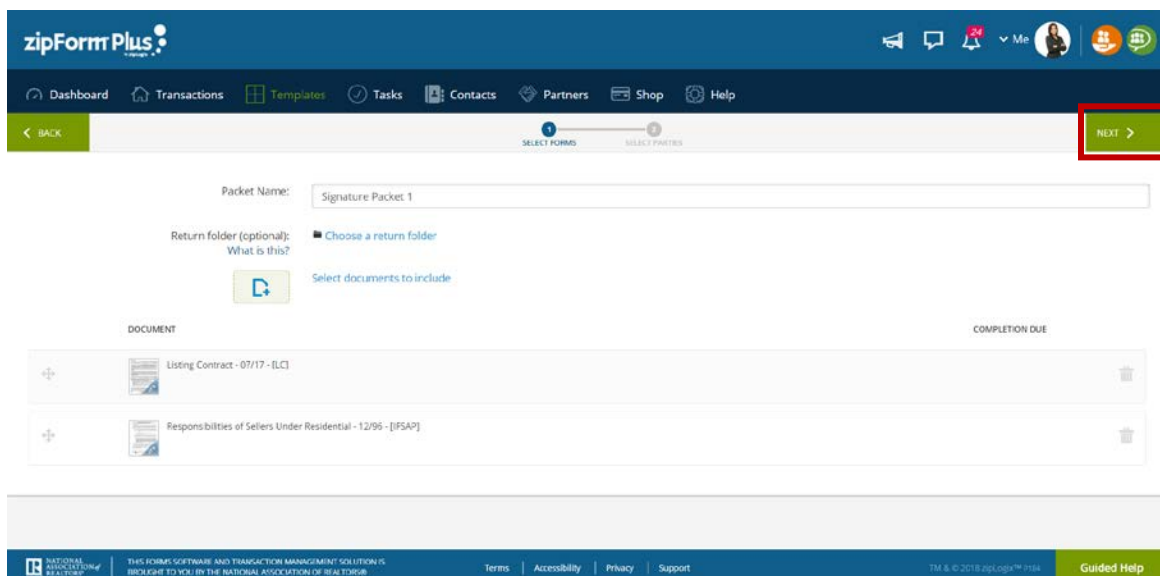
Step 7:

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**.

Step 10:

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

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.
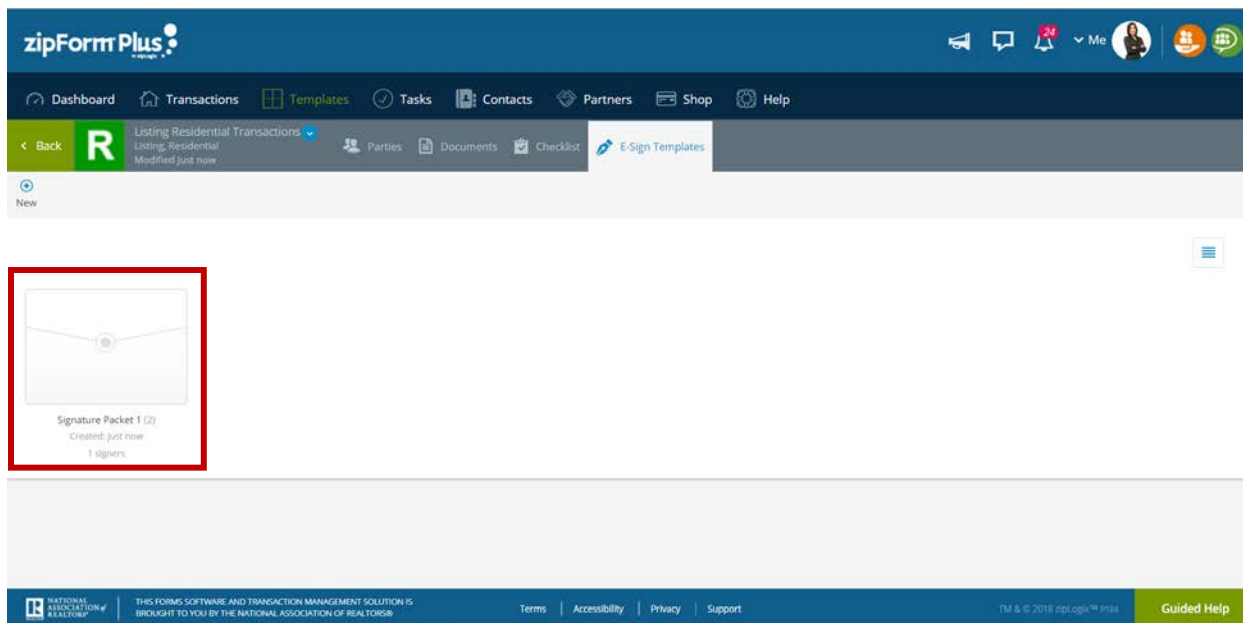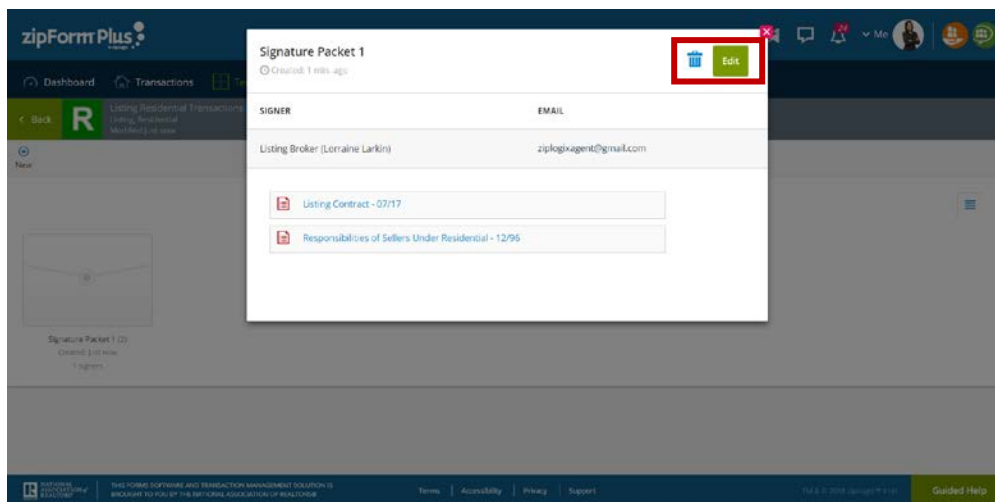

Step 12:

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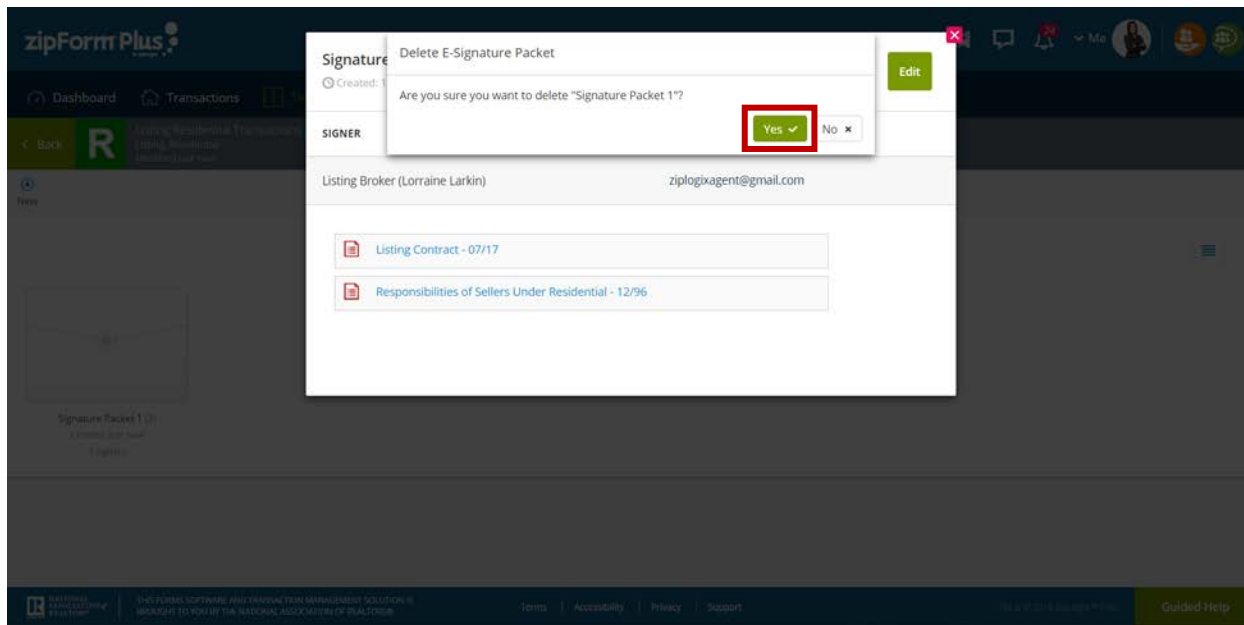
To delete an E-Sign Template, click the **Trash** icon in the upper right of the details window.

Step 13:

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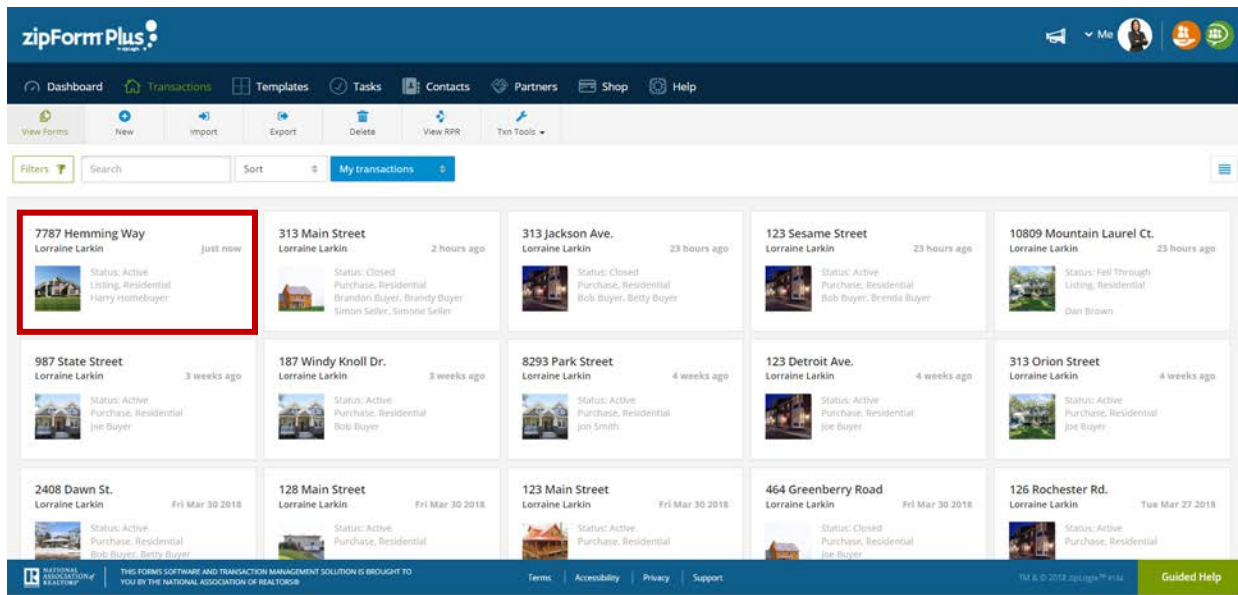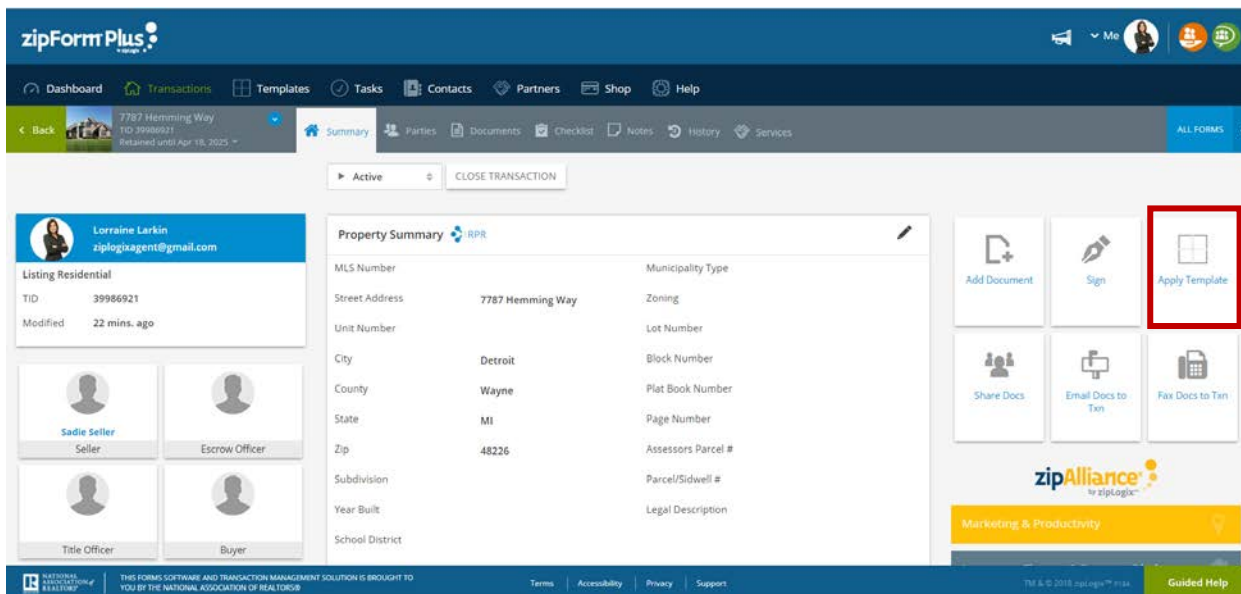
APPLYING AN E-SIGN TEMPLATE

Step 1:

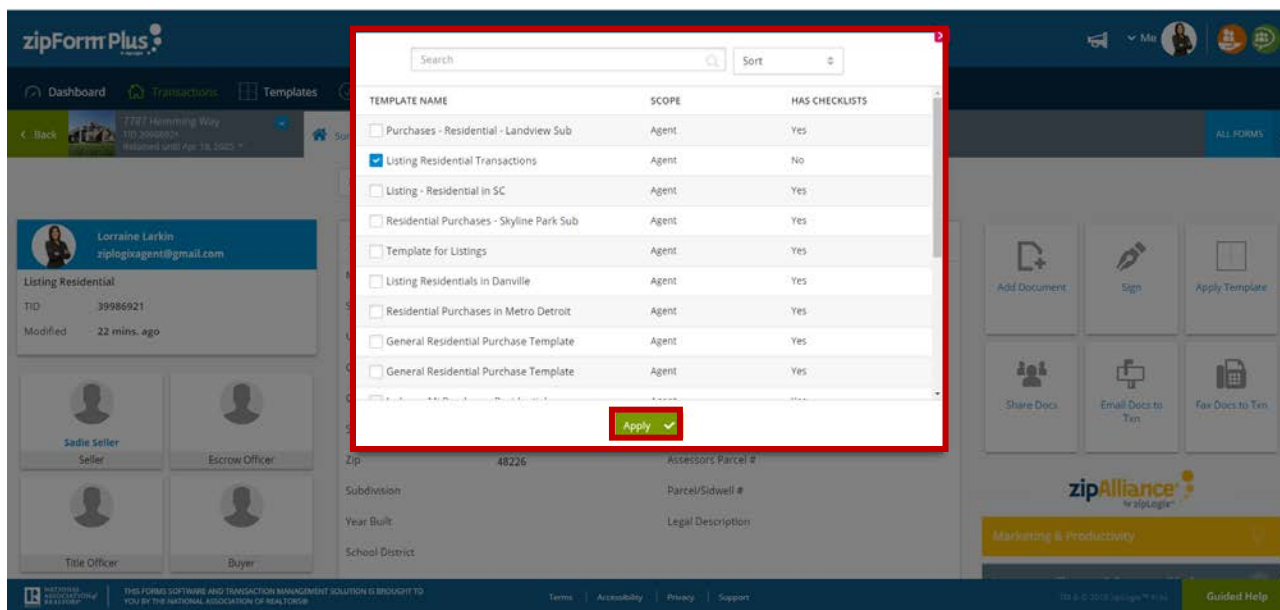Click on the transaction to send for signing.

Step 2:

Click **Apply Template** to add the template containing the E-sign template to this transaction.
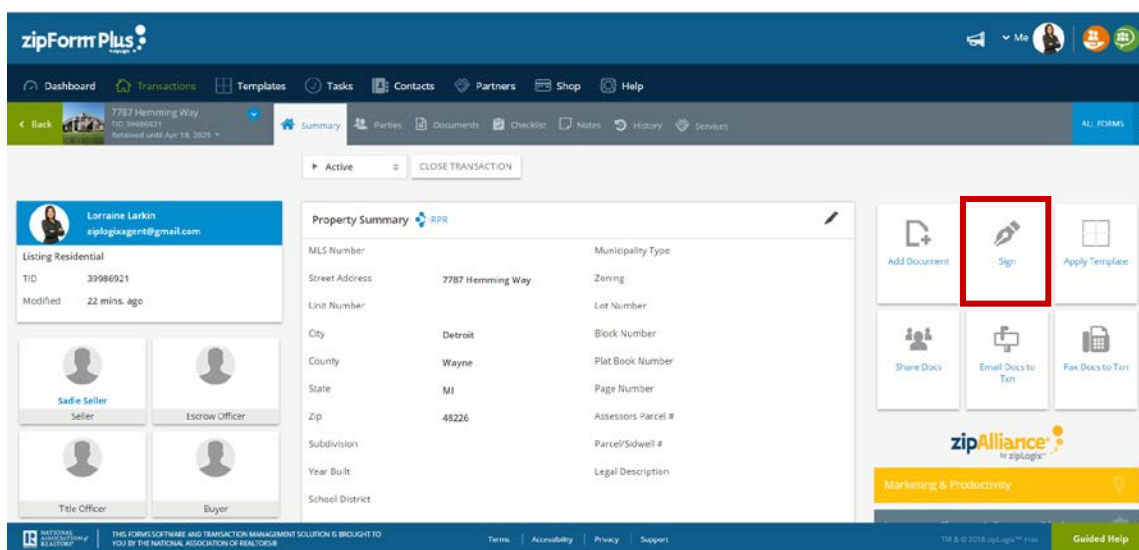
Step 3:

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).
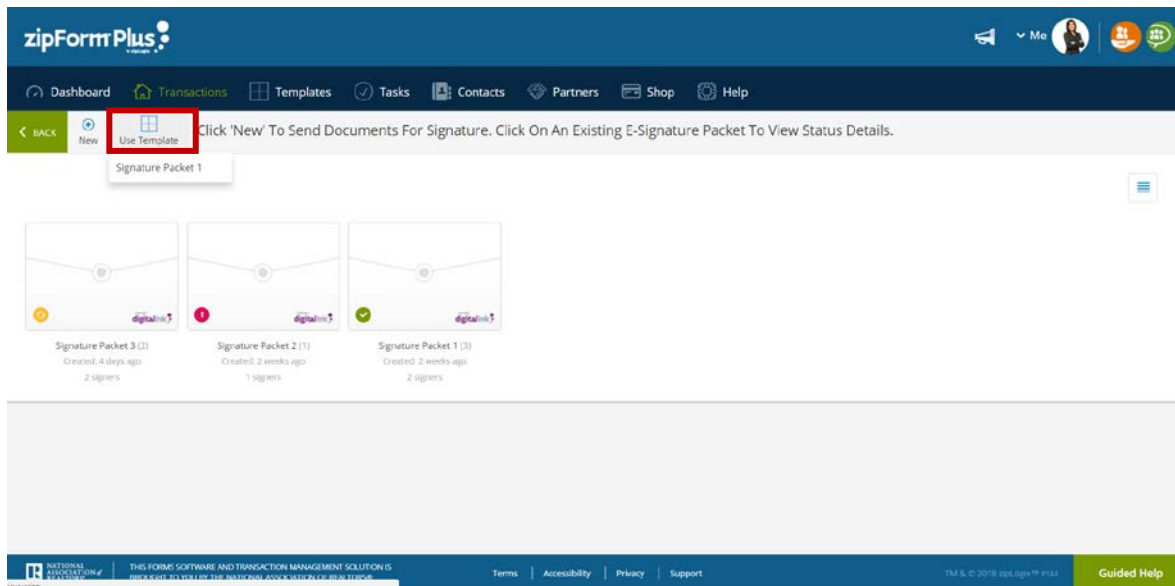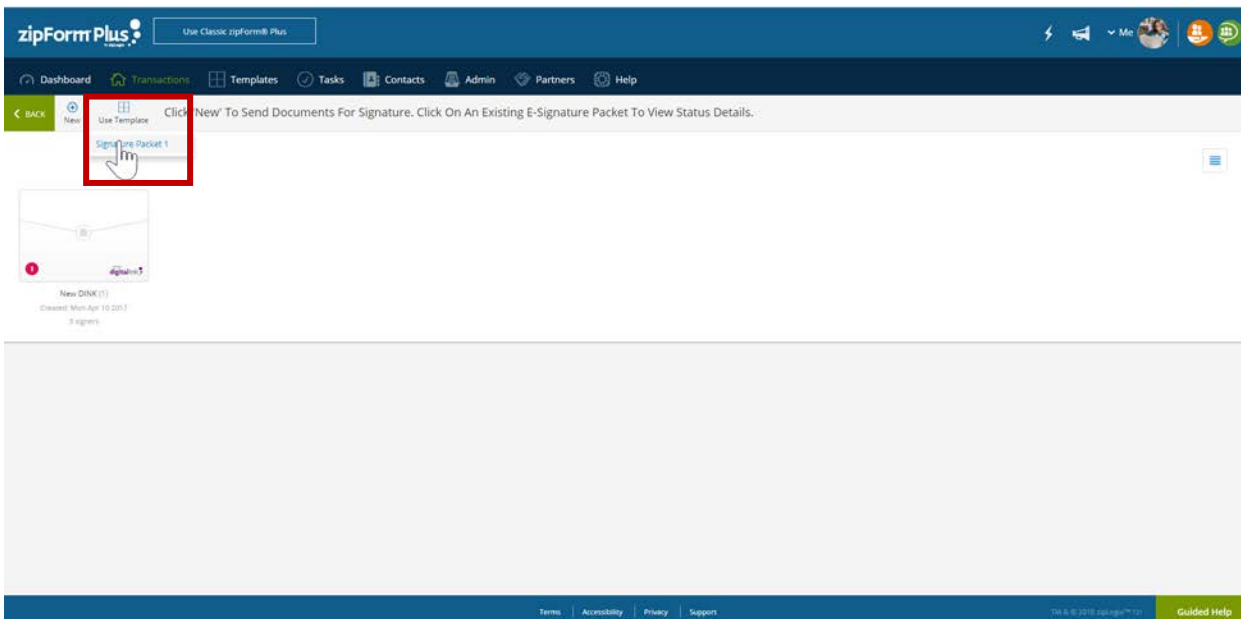
Step 5:

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.

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**.

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.