zipForm Plus Help Guide

New Jersey REALTORS® (732) 494-5616

zipForm Plus Support: (586) 840-0140

First Look

FIRST LOOK

- When you first log in to zipForm Plus, this is what you see.
- You start off on the transaction home screen. You will see any transactions you've created, and can search or sort them.
- In the navigation menu, you have Transactions, Templates, Tasks, Contacts, Partners, and Help.



Printing a Form

PRINTING A FORM

• To print a form from the library, start by clicking "Forms"



PRINTING A FORM

• The list of forms is shown on the right hand side. Find the form you want, and hover your mouse over it to show the options menu button.

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keout MLS e-Sign Connect	More	Select Library - Sort -
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		.Transaction Cover Sheet
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		Addendum Regarding Possible Short Sal
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	•	Agreement for Payment of Rebate to Bu
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	A	Consumer Information Statement C - 2012
		Consumer Information Statement D - 2012
		Contract of Sale with Opinion 26 NOTI
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		Exclusive Buyer Agency Agreement - 7/12
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		Exclusive Tenant Agency Agrmt 7/12
		FHA/VA Amendatory Clause and Certific
		For Your Protection Get a Home Inspecti
		Independent Contractor Agreement - 7/12
		Information Release for Residential Leas
		Informed Consent to Dual Agency (Landl
		Informed Consent to Dual Agency (Tena
		Informed Consent to Dual Agency - Buye



• Click "Print Blank" to print a copy of the form.

Creating a Transaction

CREATE A TRANSACTION

• To create a transaction, click "New" from the home screen.



CREATE A TRANSACTION

• Enter transaction details, type, and optional comments

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•	Transact	ion Deta	ils					×	
	Name:								
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							Save	Close	-

Working With a Transaction

WORKING WITH A TRANSACTION

- Transaction tools/actions are across the top (Print / E-mail / Esign / etc.)
- List of forms is in the right sidebar, click on any form to add it to the transaction

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TRANSACTIONS TEMPL	ATES TASKS CONTACTS PARTNERS HELP		Quentin Leonard
4401 4th Street S Listing, Residential Modified 49 minutes ago Transaction Status Active V Folders	Documents Parties Property Checklist Services History Image: Apply Back Apply Add Image: Add Folder Image: Add Folder Delete Document Print Save as Send Transet Image: Apply Template Document Document Delete Document Print Save as Send Transet	Enter Keyword(s)	Search Form Name or Description Select Library Sort New Jersey Association of REALTORS® Acronym:NJAR Version:177.0 .Transaction Cover Sheet Addendum A, Lead Based Paint Disclos Addendum Regarding Possible Short Sal Addendum Regarding Possible Short Sal Addendum, Lead Based Paint Disclosure Agreement for Payment of Rebate to Bu Consumer Information Statement A - 2012 Consumer Information Statement B - 2012 Consumer Information Statement C - 2012

WORKING WITH A TRANSACTION

- CIS C form has been added to the transaction
- Click on the form to open it and begin editing

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TRANSACTIONS TEMPLA	ATES TASKS CONTACTS PARTNERS H	ELP	-	💬 Quentin Leonard
4401 4th Street S Listing, Residential Modified 49 minutes ago Transaction Status Active V Folders	Decuments Parties Property Checklist Services History Image: Apply Template Image: Apply Templat Ima	Enter Keyword(s) Transaction Info Collaborate Copy PDF Sort Organize	All Forms V	Search Form Name or Description Select Library Sort New Jersey Association of REALTORS® Acronym:NJAR Version:177.0 Transaction Cover Sheet Addendum A, Lead Based Paint Disclos Addendum Regarding Possible Short Sal Addendum, Lead Based Paint Disclosure Agreement for Payment of Rebate to Bu Consumer Information Statement A - 2012 Consumer Information Statement B - 2012 Consumer Information Statement D - 2012 Consumer Information Statement D - 2012 Contract of Sale with Opinion 26 NOTIC

Editing Forms

EDITING FORMS

• All editable fields will be highlighted in yellow and clickable

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EDITING FORMS - FASTFILL

• Fastfill allows you to see only the editable fields on the form, stripping away the verbose language.

Fullscreen Save Email	Print Transaction Fastfill Save as PDF Services
X In the seller, not the buyer:	
X if the buyer, not the seller:	
X if both the seller and the buyer:	
X If neither the seller nor the buyer:	
Seller One Name:	Mary Seller
Seller Two Name:	
Listing Agent Name:	
Buyer One Name:	Tom Buyer
Buyer Two Name:	
Selling Broker Name:	
Prepared by:	Quentin Leonard
221: Seller1 Full Address:	
Seller I Full Address:	
Property Full Address:	200 American Metro Blvd, Trenton, NJ 08619-2320
Property Municipal Tax Map:	
Property County:	Mercer
Property Lot:	
Property Block:	
Durahana Drian	
Purchase Price:	
Purchase Price: Property, Deposit Amount, Initial	
Purchase Price: Property, Deposit Amount, Initial Property, Deposit Amount, 1st	

Creating a Template

CREATING A TEMPLATE

• In the navigation menu, click "Templates", then click "New" to create your template.

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SACTIONS	TEMPLATES	TASKS	CONTACTS	PARTNERS	HELP		_	~
	RB							
Forms New Delete	Import Export	Clauses						
All Enter Keyword(s)				So	rt -			
Templates are time saving tools	that you can use to create t	ransactions quickly wit	h commonly used for	ns and information.Learn M	ore	X		
)						
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CREATING A TEMPLATE

• Next, fill in the relevant details of this template. Select a template type and property type. If you're the broker, you can select this template to be available to the whole office.

ame: My Residential Lo		
– Template Type ————	Property Type	Status —
Clisting	• Residential O Commercial	 Agent
OPurchase	O Industrial O Vacant Land	Global
 Lease 	O Multiunit O Farm and Ranch	Office
	Condominium O Manufactured Home	
 Automatically apply this 	is template to all new transactions	
Apply Template		•
Apply Template		

CREATING A TEMPLATE

• The next step is to select which forms you want included in this template.



CREATING A TEMPLATE – PARTIES!



- At this point, you're done! But, you can take it a step further, and define any parties that won't change from transaction to transaction.
- Click "Parties", then click "New" to add a party to the template

zipForm Plus	
TRANSACTIONS	ATES TASKS CONTACTS PARTNERS HELP
My Residential L Template Lease, Residential Modified 5 minutes ago	Documents Parties Property Checklist Image: Second state Image: Second state Image: Second state Image: Second state New Delete Image: Transaction Info Image: Second state Image: Second state
 All Parties Tenant Contacts Landlord Contacts Service Providers Other Contacts 	

CREATING A TEMPLATE – PARTIES!



- Select a type, then fill in all the appropriate information about that party.
- This information will be automatically included on any form in this template that includes those fields.

Image: Selling Broker Selling Broker Selling Broker Role Selling Broker Broker Firm Name Broker Fax Agent Name(Licensee) Gel ID# Business Fax City Street Address City Street accontact						
Selling Broker	Transaction Party			Selling Broker Selling Broker		×
Role Selling Broker Home Warranty Company Broker Firm Name Broker Fax Agent ID# Agent ID# Agent ID# Agent ID# Agent Phone Email Cell Phone Broker Sax Broker Address Broker Name City Stata Stata With Stata Stata Stata Stata Stata Stata Stata Stata Stata Stata <	Selling Broker		-	Escrow Company Appraisal Company Disclosure Company	ng Brr	ort Add Contact
Broker Firm Name Broker Fax Agent Name Agent ID# Agent ID# Email Cell Phone Business Fax Broker Office ID# Street Address City Street Address State Save as Contact Save as Contact Save Cancel Clear	Role	Selling Broker		Home Warranty Company		~
Broker Fax Agent Name(Licensee) Agent ID# Agent Phone Email Cell Phone Business Fax Broker Office ID# Street Address Broker Name City Agent License Number Strate Save as Contact Save Cancel Clear	Broker Firm Name		*	*tle Company		~
Agent ID# Agent Phone Email Cell Phone Business Fax Broker Office ID# Street Address Broker Name City Agent License Number Stata Agent License Number Stata Agent License Number	Broker Fax		~	Agent Name(Licensee)		~
Email Cell Phone Business Fax Broker Office ID# Street Address Broker Name City Agent License Number State Save as Contact Save Cancel Clear	Agent ID#		~	Agent Phone		~
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Adding Clauses

ADDING CLAUSES

• To add a clause, click "Clauses" from the home screen to open the clause manager, then click "New"

zipForm Plus		
TRANSACTIONS TEMPLATES	6 CONTACTS PARTNERS HELP	
Forms New Delete Import Export Cia	ss LookUp Mortgage Vault Create Service Manager Calculator Statistics Digital Ink Providers	
Active Enter Keyword(s)	▼ Sort ▼ My Transactions ▼	

ADDING CLAUSES

• Next, fill in the clause details. You can create a new category for the clause, or add it to an existing one.

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ADDING CLAUSES – INSERTING INTO FORMS

 To add the clause to your form, click the pencil icon when you get to the clauses section.



ADDING CLAUSES – INSERTING INTO FORMS

 Find the clause you want to add, then click "Insert" to place it into the form.



E-Sign

E-SIGN

- zipForm makes e-Sign easy. Start by clicking e-Sign from your transaction.
- Then, select the documents you want to e-sign, and click "Next"

TEMPLA	ATES TASKS CONTACTS PARTNERS HELP	🢬 Quentin Leonard		
sidential	Documents Parties Property Checklist Services History Enter Keyword(s)	The files below will be sent for signature. You can drag and drop the files into any order, and browse for files on your		
erday	1 Select Forms >> 2 Select Parties >> 3 Add Signatures	computer. When ready click next to continue.		
	Gancel	Browse		
Active 🗸	Back	* Drag and Drop to change the order of documents		
	Name your e-signature submission (optional):	Contract of Sale with Opinion 26 NOTICE - 10/15		
	Select any documents, torms, or form pages you would like to have signed.			
	Contract of Sale with			
	Set Due Date			
	001 505 5015			

E-SIGN – ADDING SIGNERS

• Next, select the signer(s). You must provide an e-mail address for every signer.

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	First Name*	Middle Name Last Name*	Role*	Email*	Company		
	Jane Jane	Buyer	Buyer Two	ane@buyer.com			
	Joe	Seller	Seller One				
	Mary	Seller	Seller Two				
	Mike	Buyer	Buyer One				
	Stan	Broker	Selling Agent				
	Tom	Broker	Listing Agent				
			Witness 1				
			Witness 2				
			Witness 3				
			Witness 4				

E-SIGN – REVIEW/EDIT FIELDS

- Next you'll review the signature fields. Everything is already done for you, but you are free to add custom fields as needed.
- When you're ready to send the form, click "Send".

Main St - Ur	nnamed	Select Forms ►► 2 Select Pa	rties 🕨 🚯 Add Signatures	
revious	Add Signature/Task	Party List: Jane Buyer 🗸 Document List: Contr	ract of Sale with Opinion 26 NOTI 🗸	Send Save
	the sale is comple from yours.	ted, because only then do they usually rece	eive their commissions. So	, their interests may differ
	7) Whether y you have the info	ou retain a lawyer is up to you. It is your d rmation needed to make your decision.	ecision. The purpose of the	is notice is to make sure that
	SELLER Joe Seller	DATE	BUYER Mike Buyer	DATE
			signature preview Jane Buyer	Field2
	SELLER Mary Seller	DATE	BUYER Jane Buyer	DATE
	Listing Broker Tom Broker	DATE	Selling Broker Stan Broker	DATE
	Prepared by:	Name		
1	New Jersey REALTORS® New Jersey Association of RE Phone: 732-494-4714	Form 118-Statewide 10/15 Page 1 of 14 ALTORS®, 200 American Metro Blvd Ste 123 Hamilton, Fax: Quentin Leonard Produced with zipForm® by zipLogix 18070 Fifteen Mile Ro	NJ 08619 nad, Fraser, Michigan 48026 <u>www.zipLopix</u>	.com

E-SIGN – DONE!

• That's it! The signers will complete the e-sign process, and you'll be notified when the signed documents have been returned.