zipForm Plus Help Guide

New Jersey REALTORS®

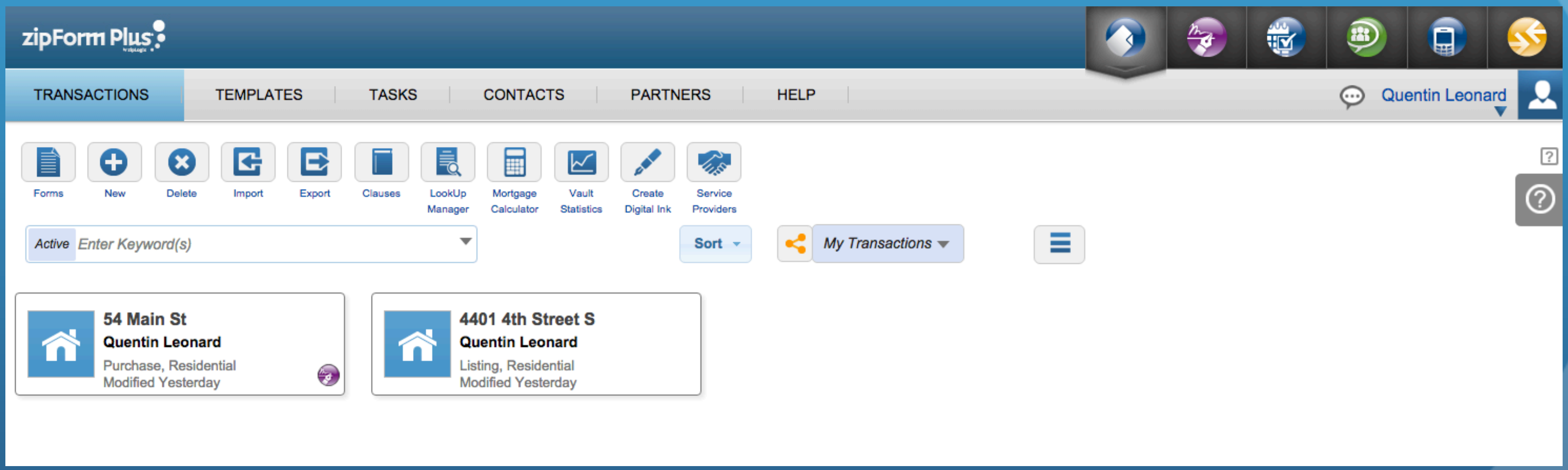
(732) 494-5616

zipForm Plus Support: (586) 840-0140

First Look

First Look

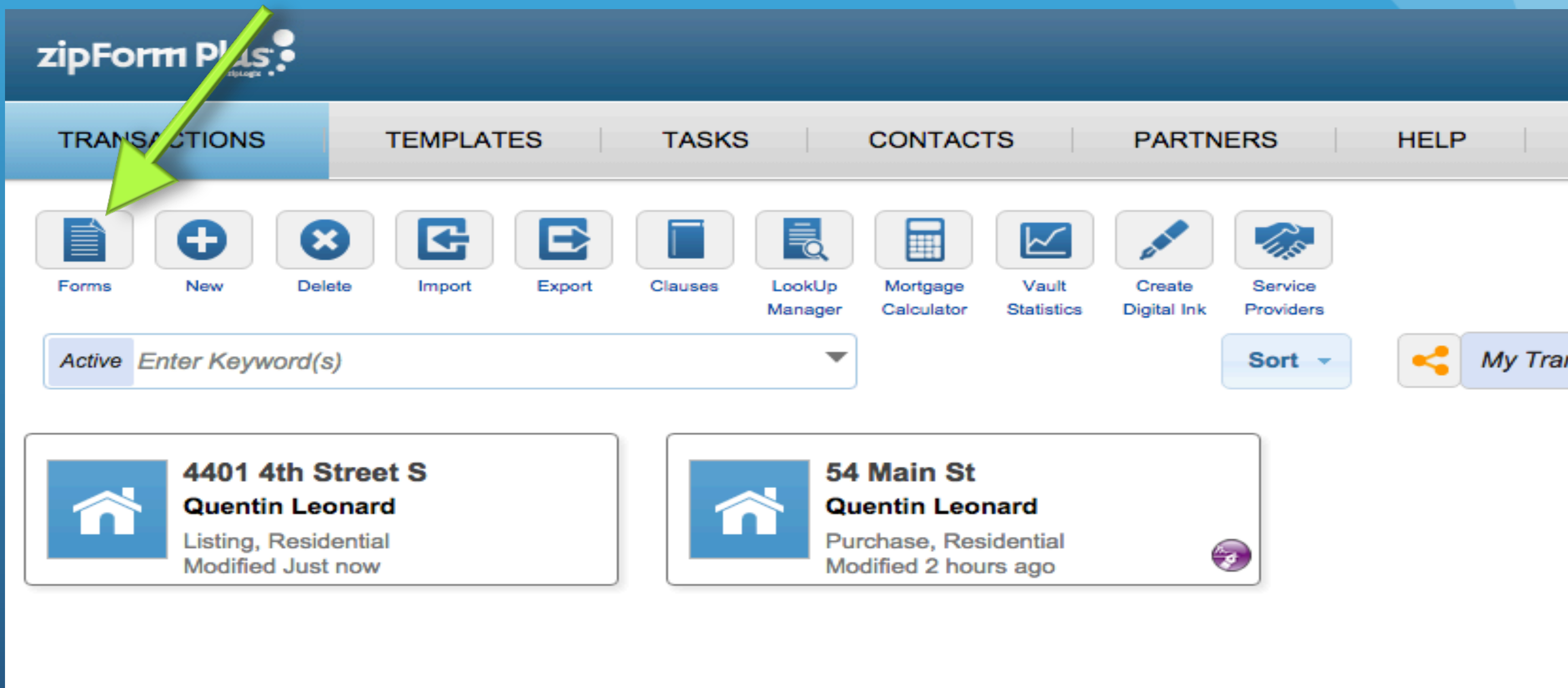
- When you first log in to zipForm Plus, this is what you see.
- You start off on the transaction home screen. You will see any transactions you've created, and can search or sort them.
- In the navigation menu, you have Transactions, Templates, Tasks, Contacts, Partners, and Help.



Printing a Form

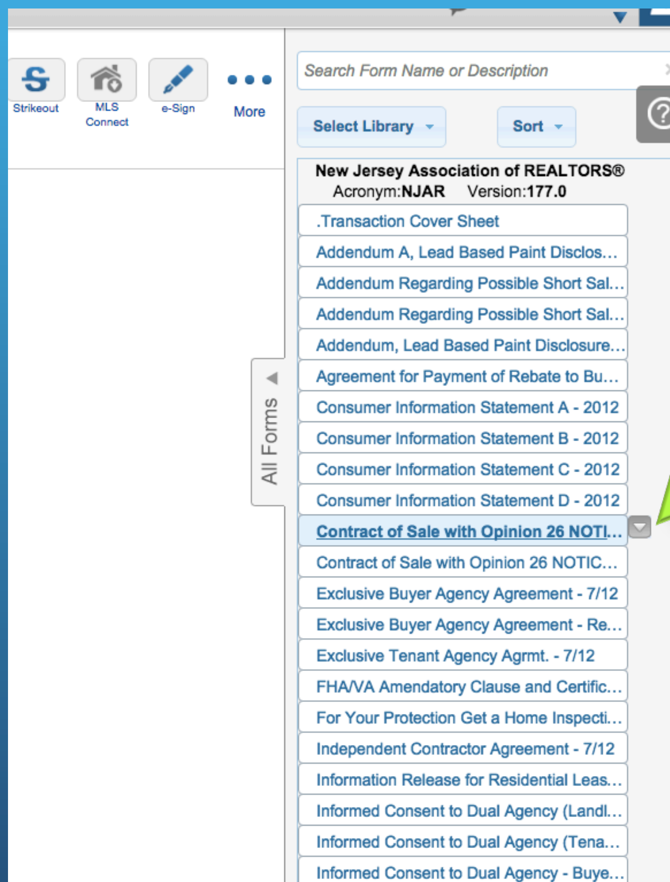
Printing a Form

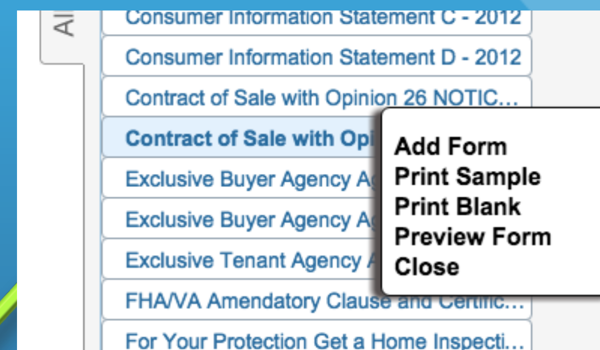
- To print a form from the library, start by clicking "Forms"



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.



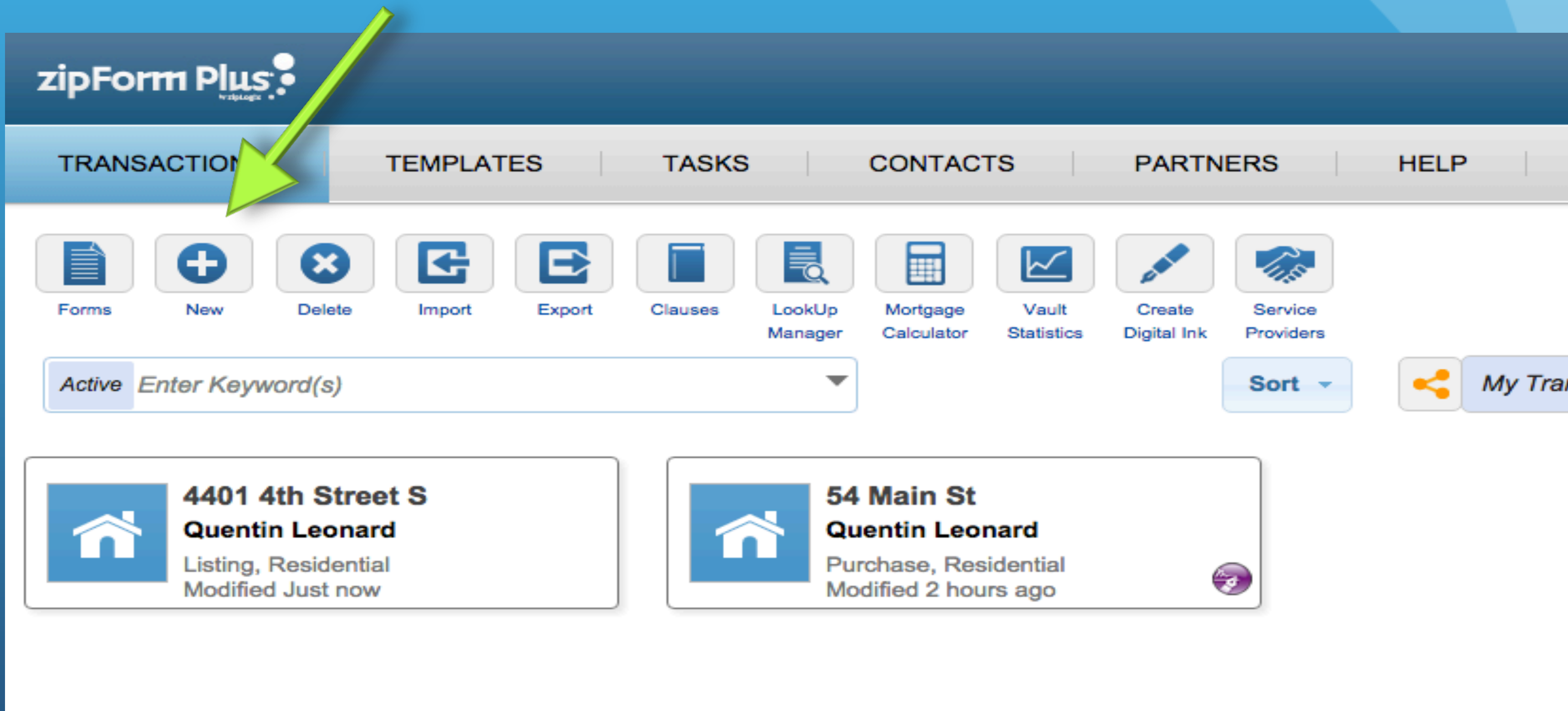


- Click "Print Blank" to print a copy of the form.

Creating a Transaction

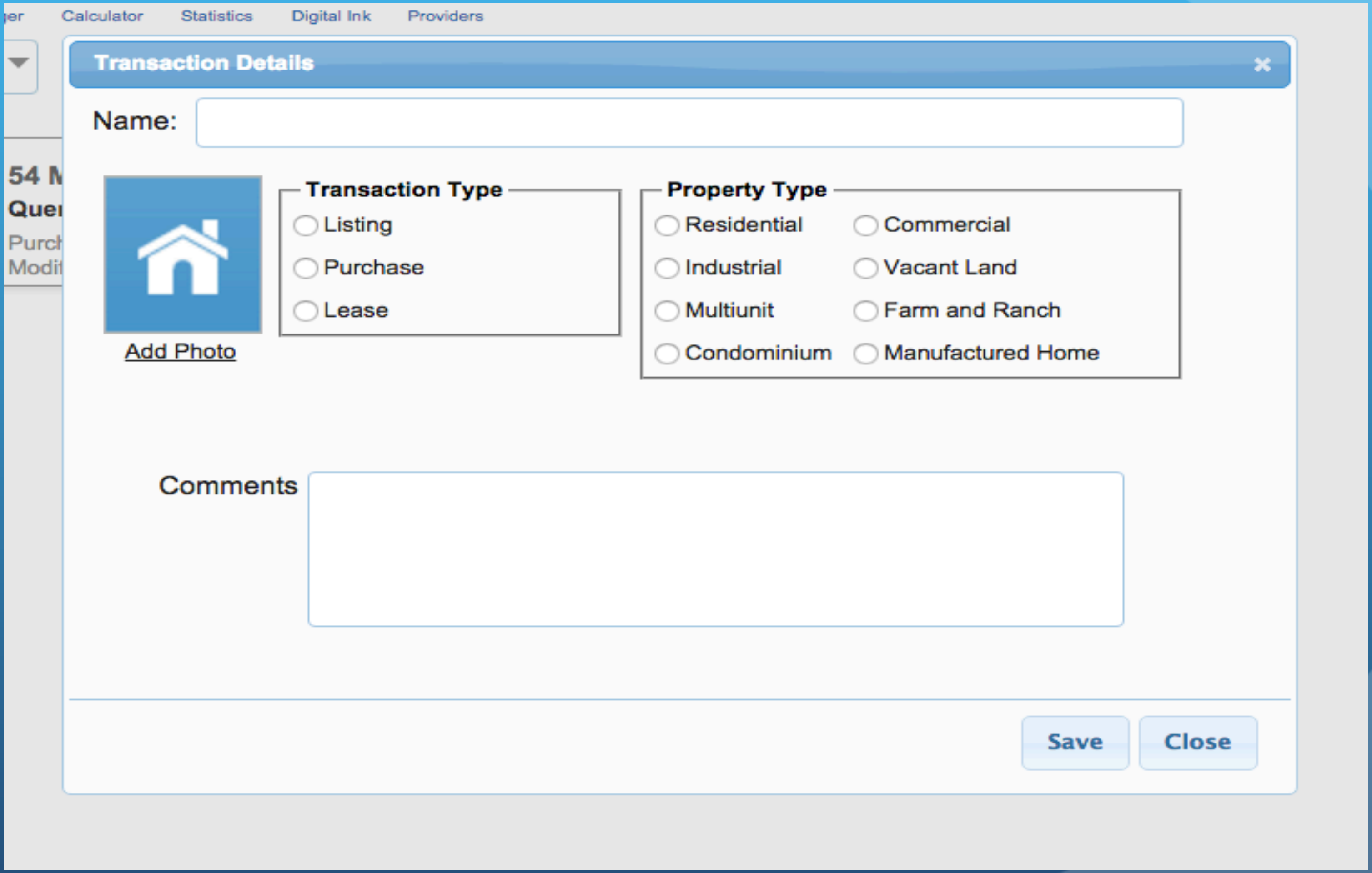
Create a Transaction

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



Create a Transaction

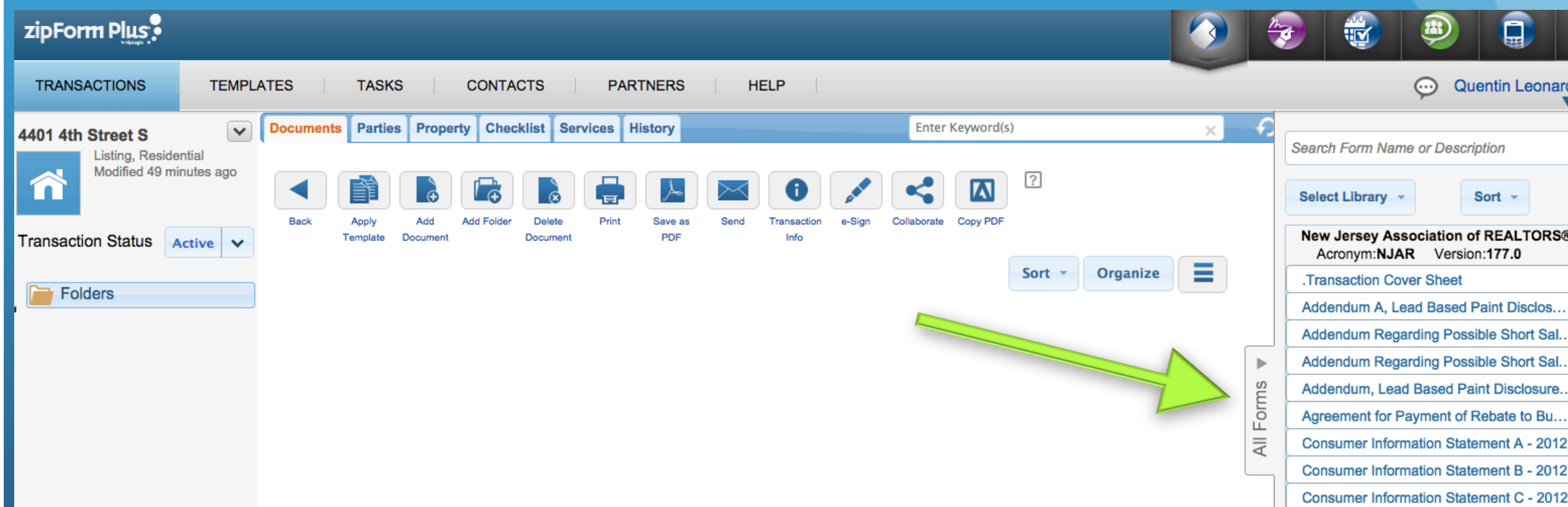
- Enter transaction details, type, and optional comments



Working With a Transaction

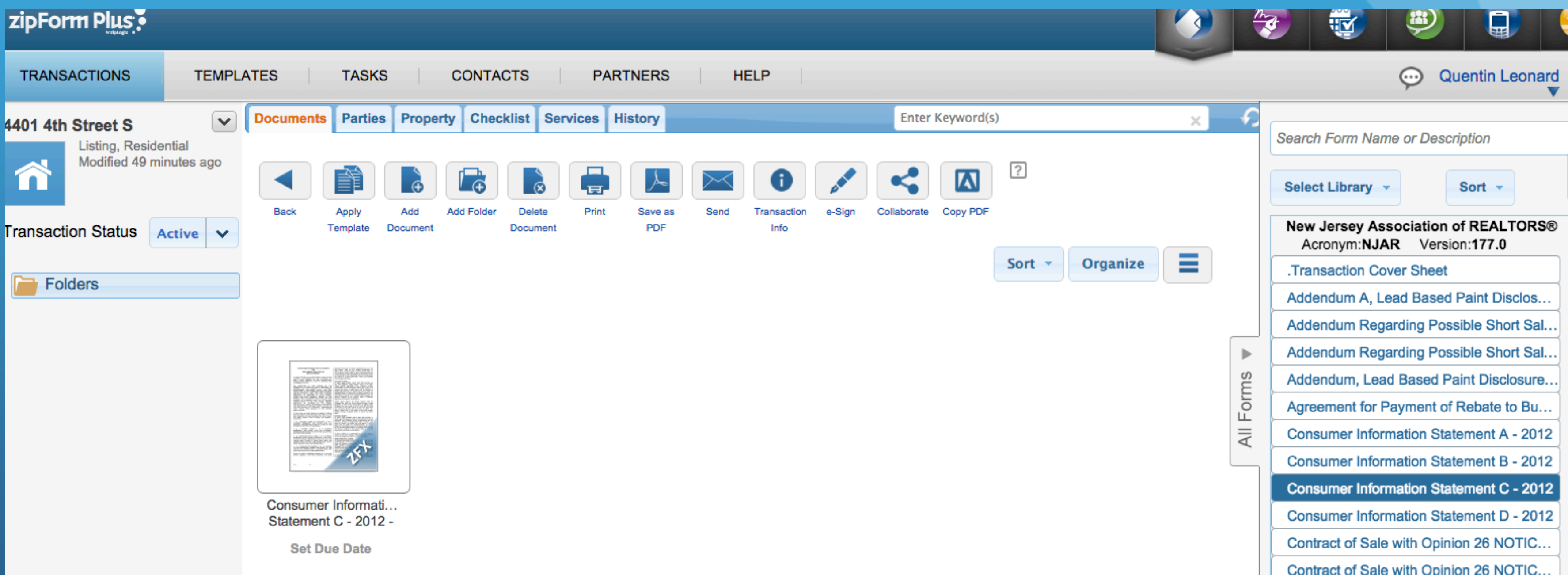
Working With a Transaction

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



Working With a Transaction

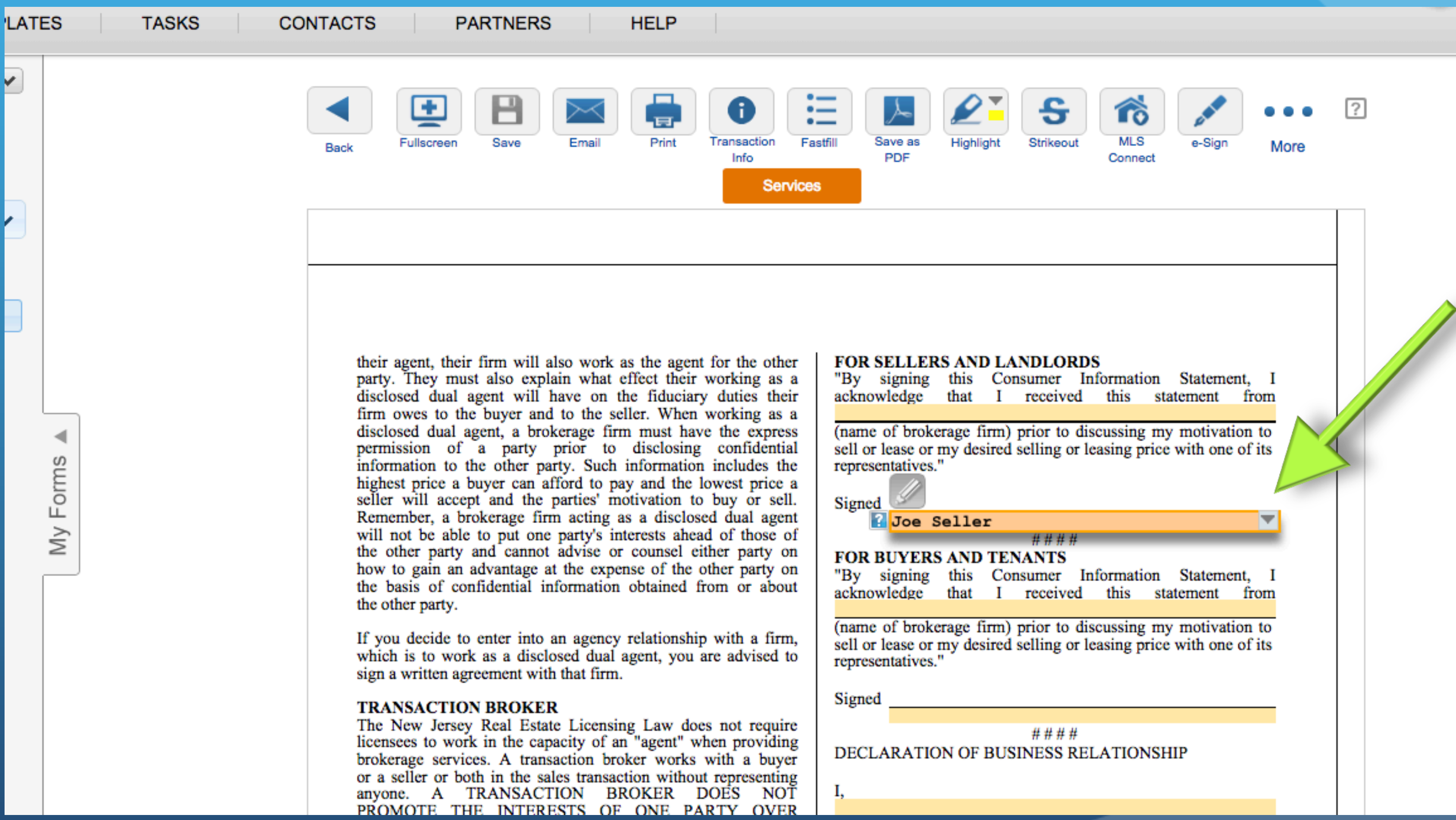
- CIS C form has been added to the transaction
- Click on the form to open it and begin editing



Editing Forms

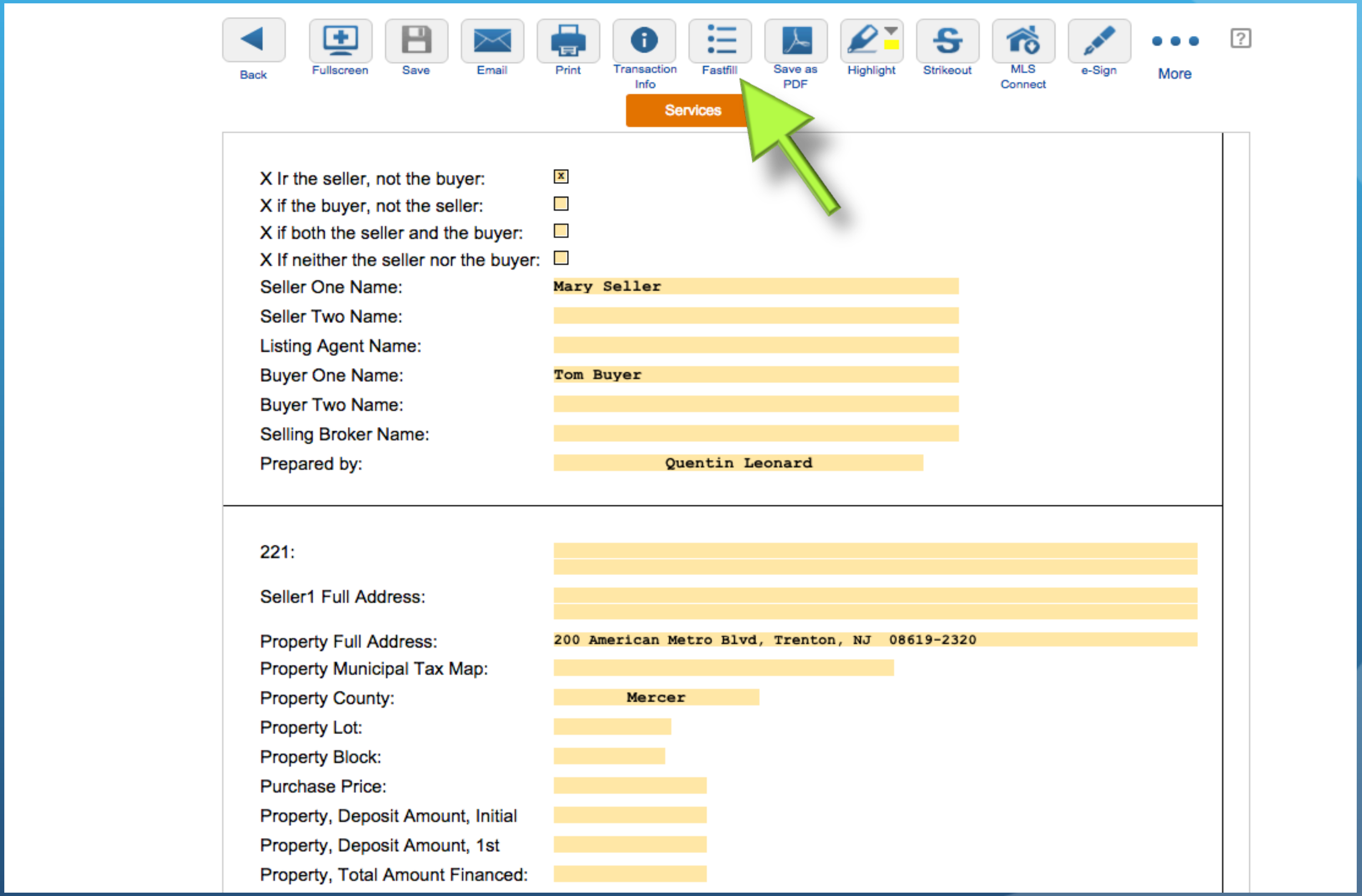
Editing Forms

- All editable fields will be highlighted in yellow and clickable



Editing Forms - FastFill

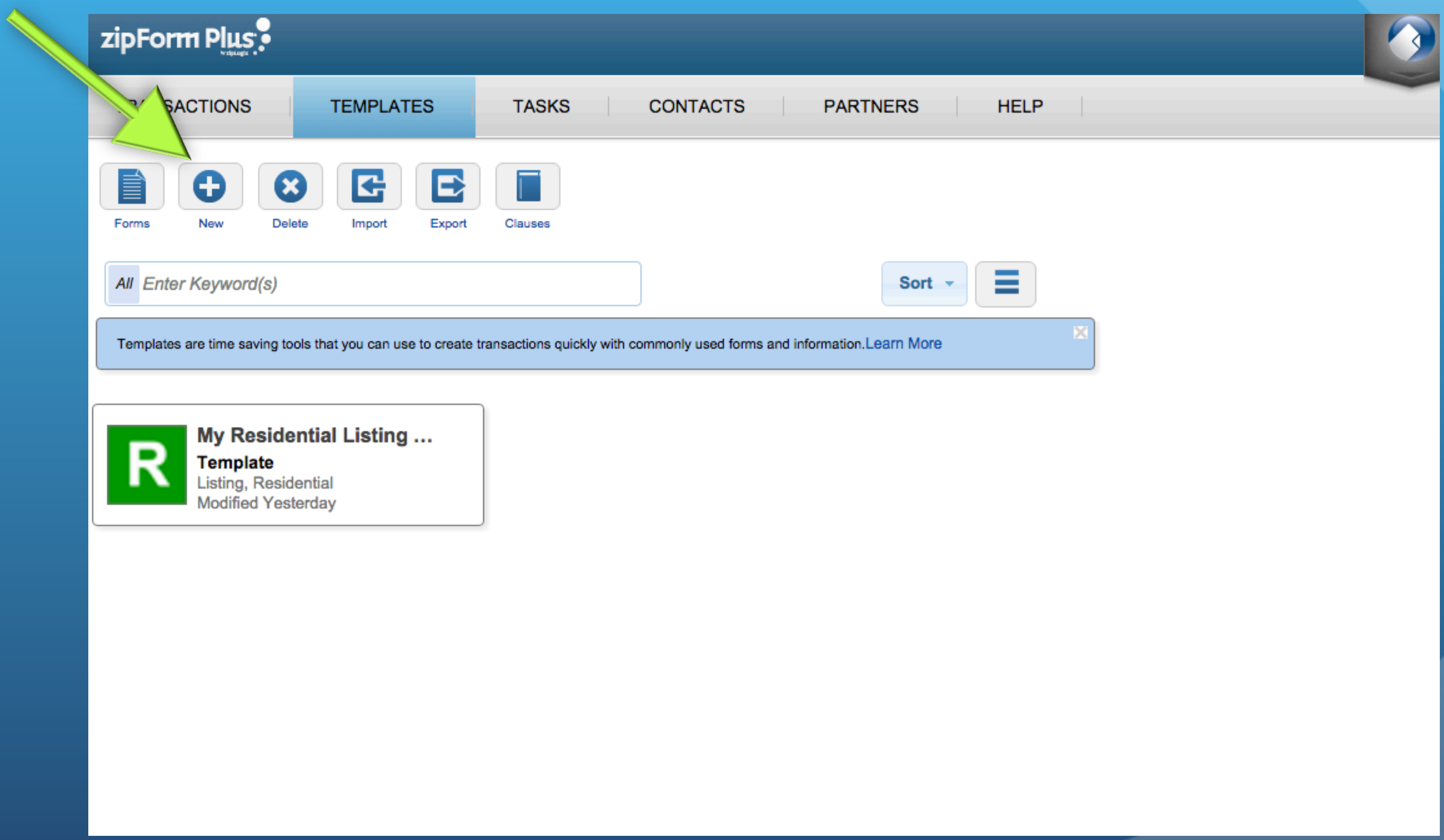
- Fastfill allows you to see only the editable fields on the form, stripping away the verbose language.



Creating a Template

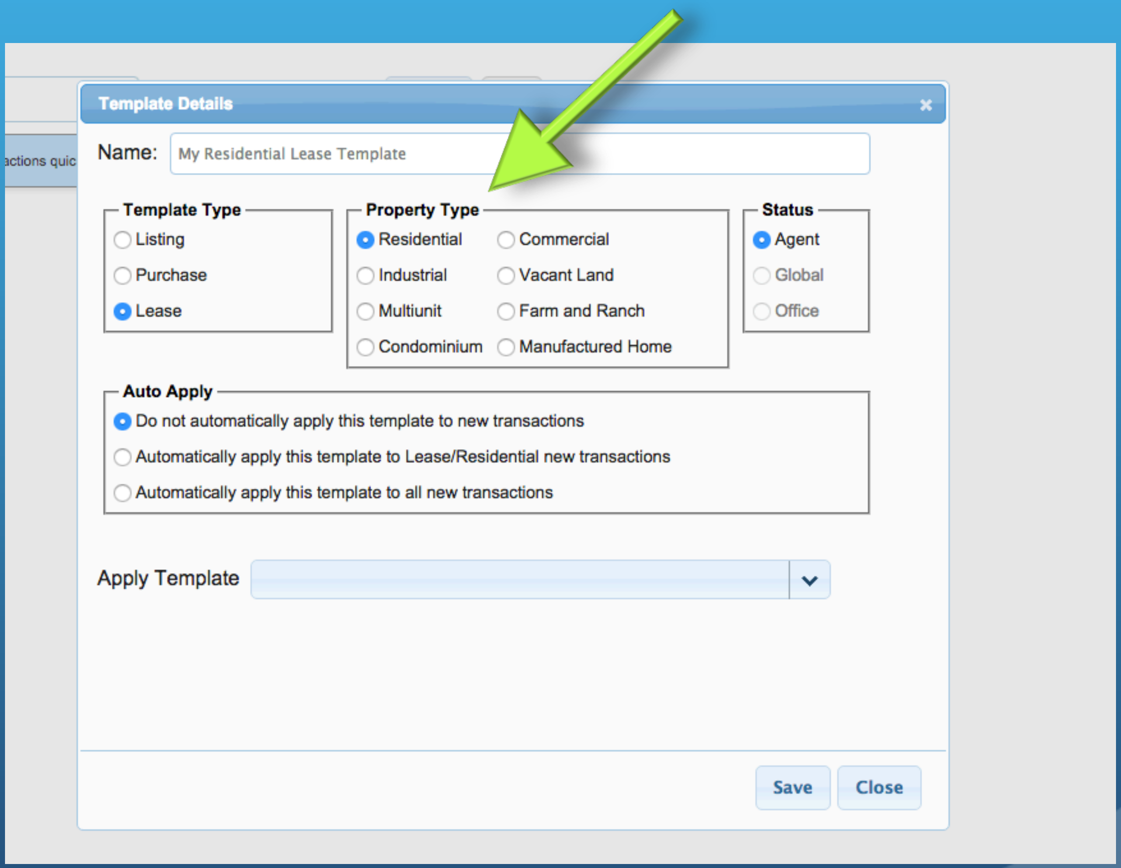
CREATING A TEMPLATE

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



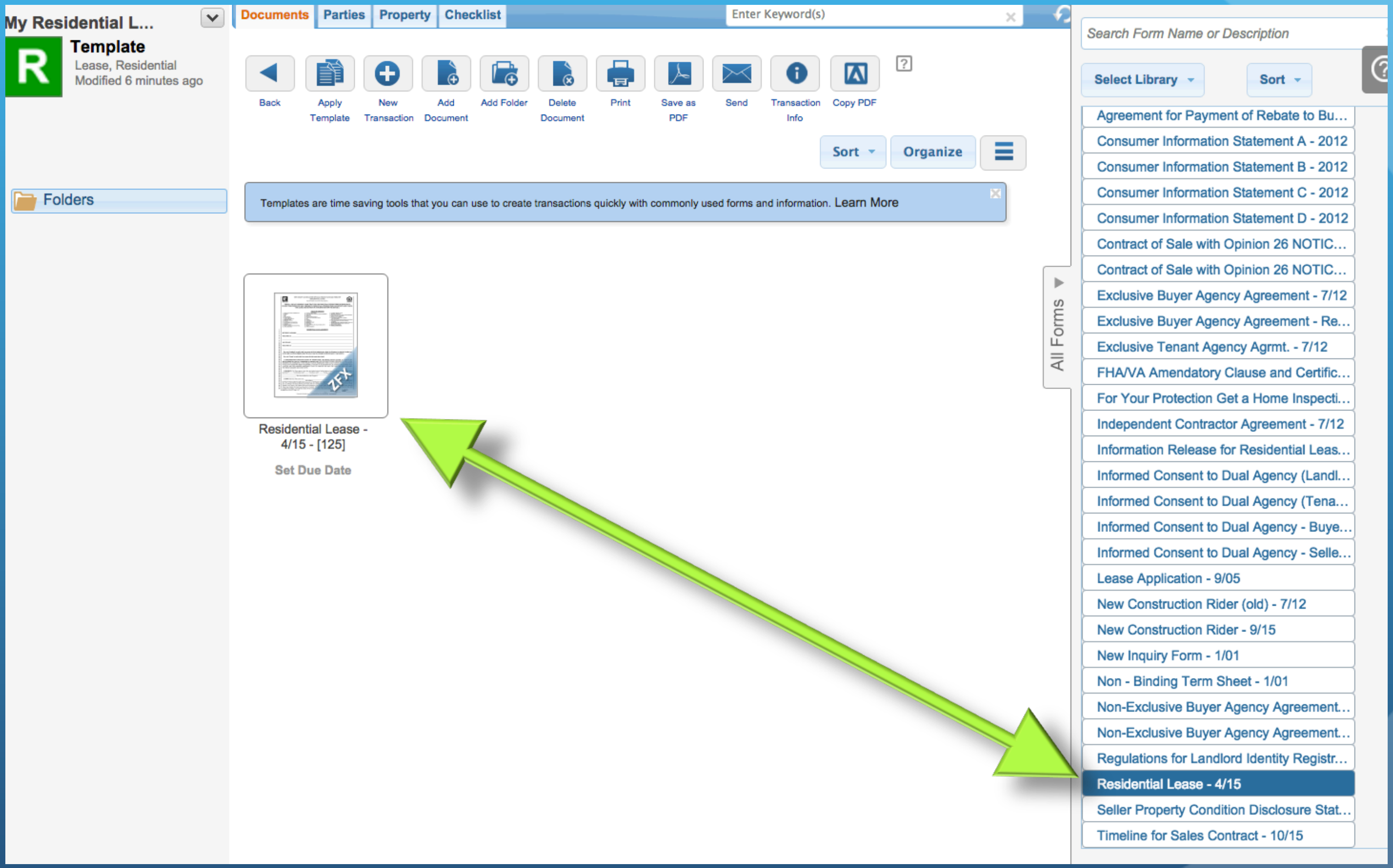
Creating A Template

- 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.



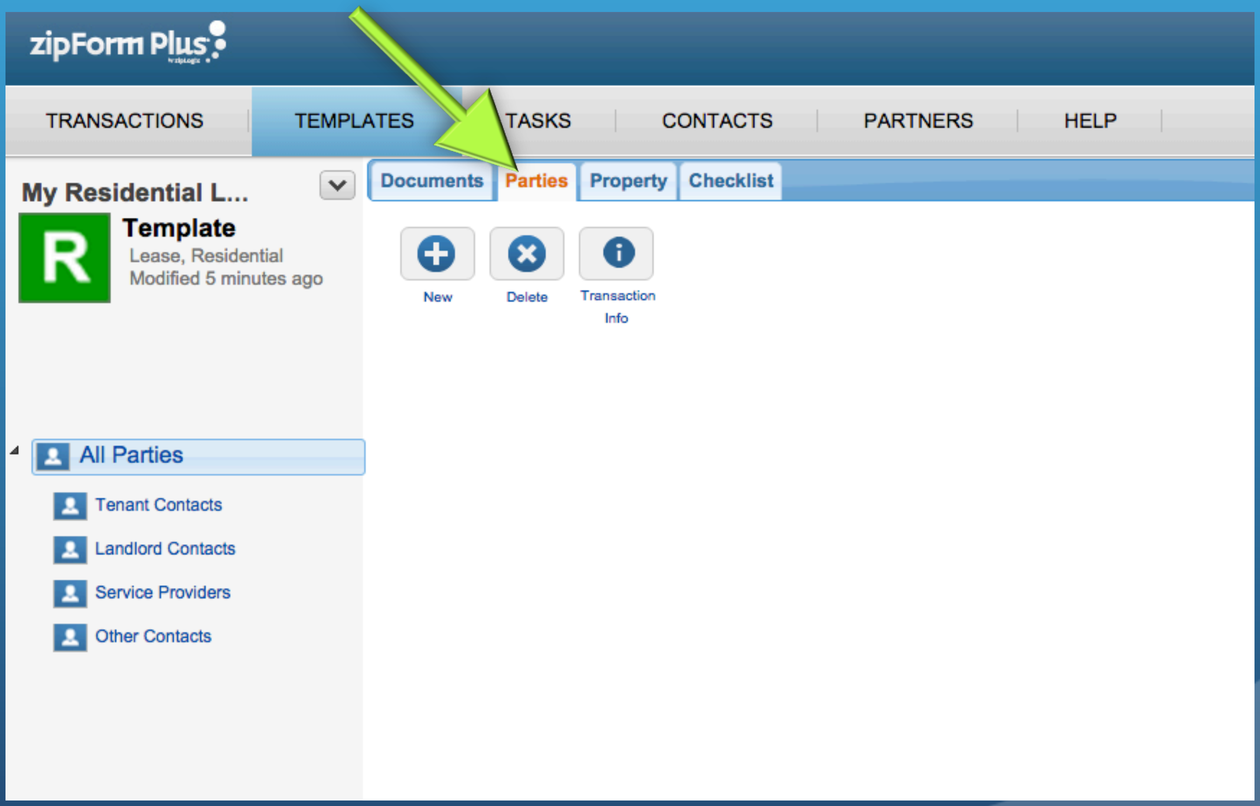
Creating A Template

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



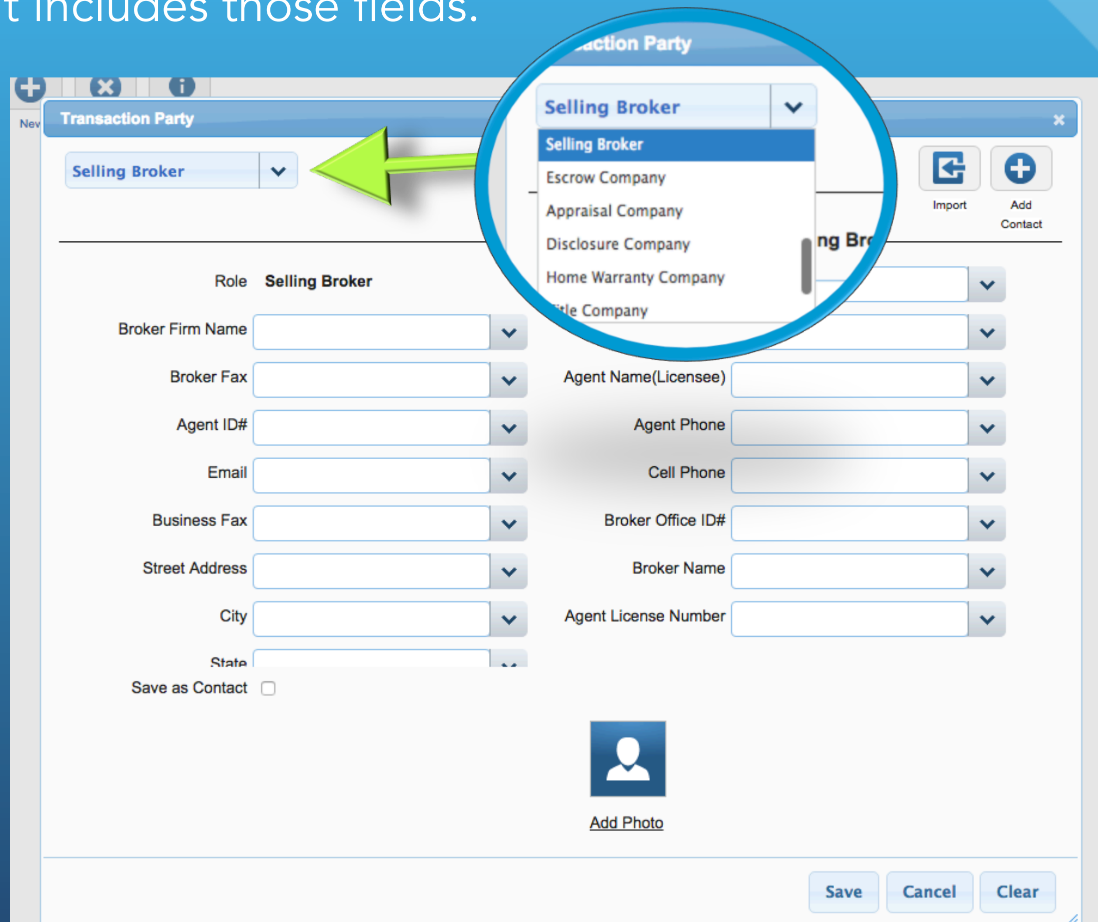
Creating a Template – Parties!

- 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



Creating a Template – Parties!

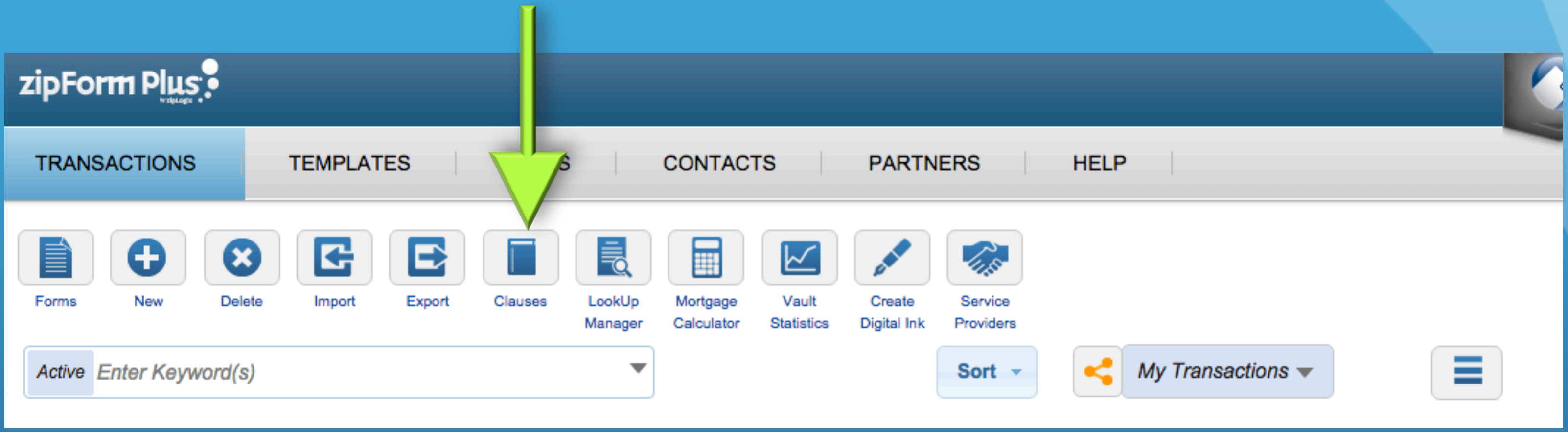
- Select a type, then fill in all the appropriate information about that party.
- This information will be automatically included on any form in this template that includes those fields.



Adding Clauses

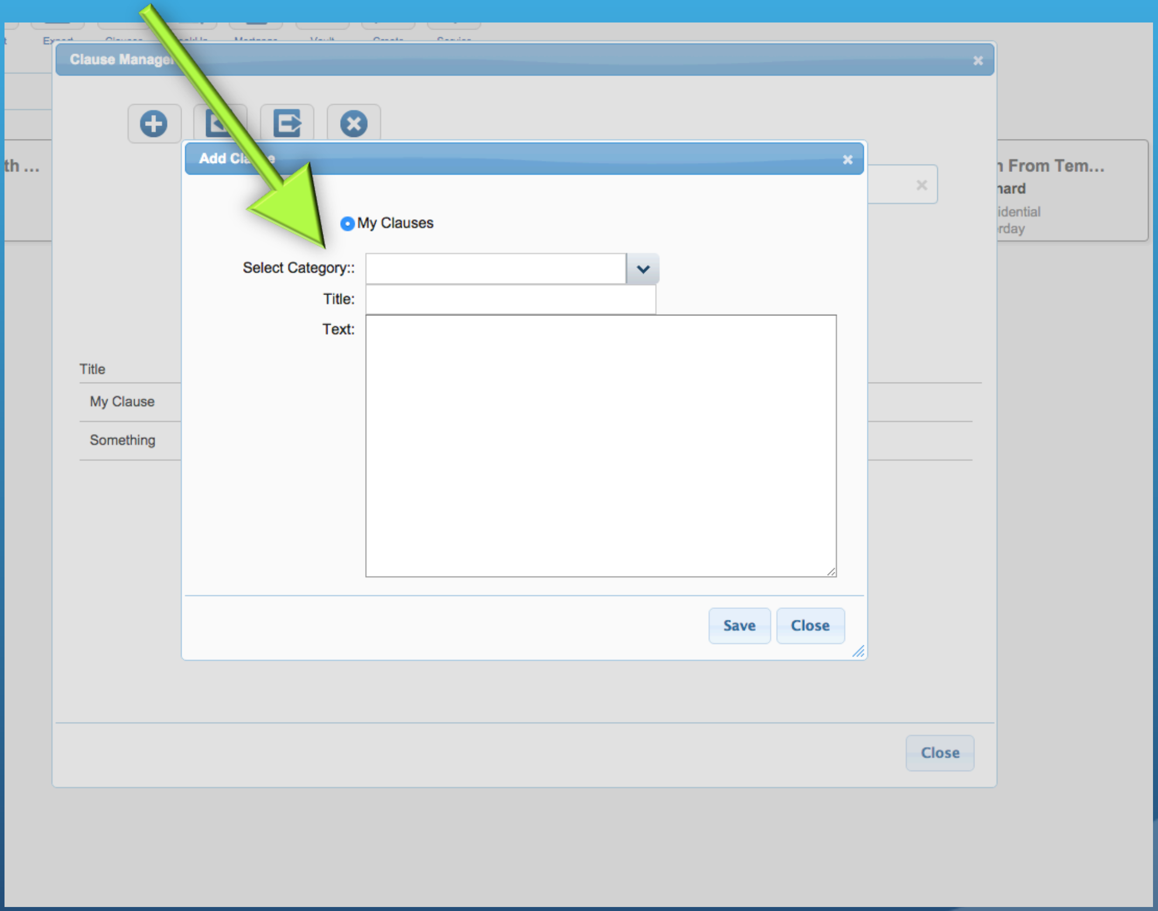
Adding Clauses

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



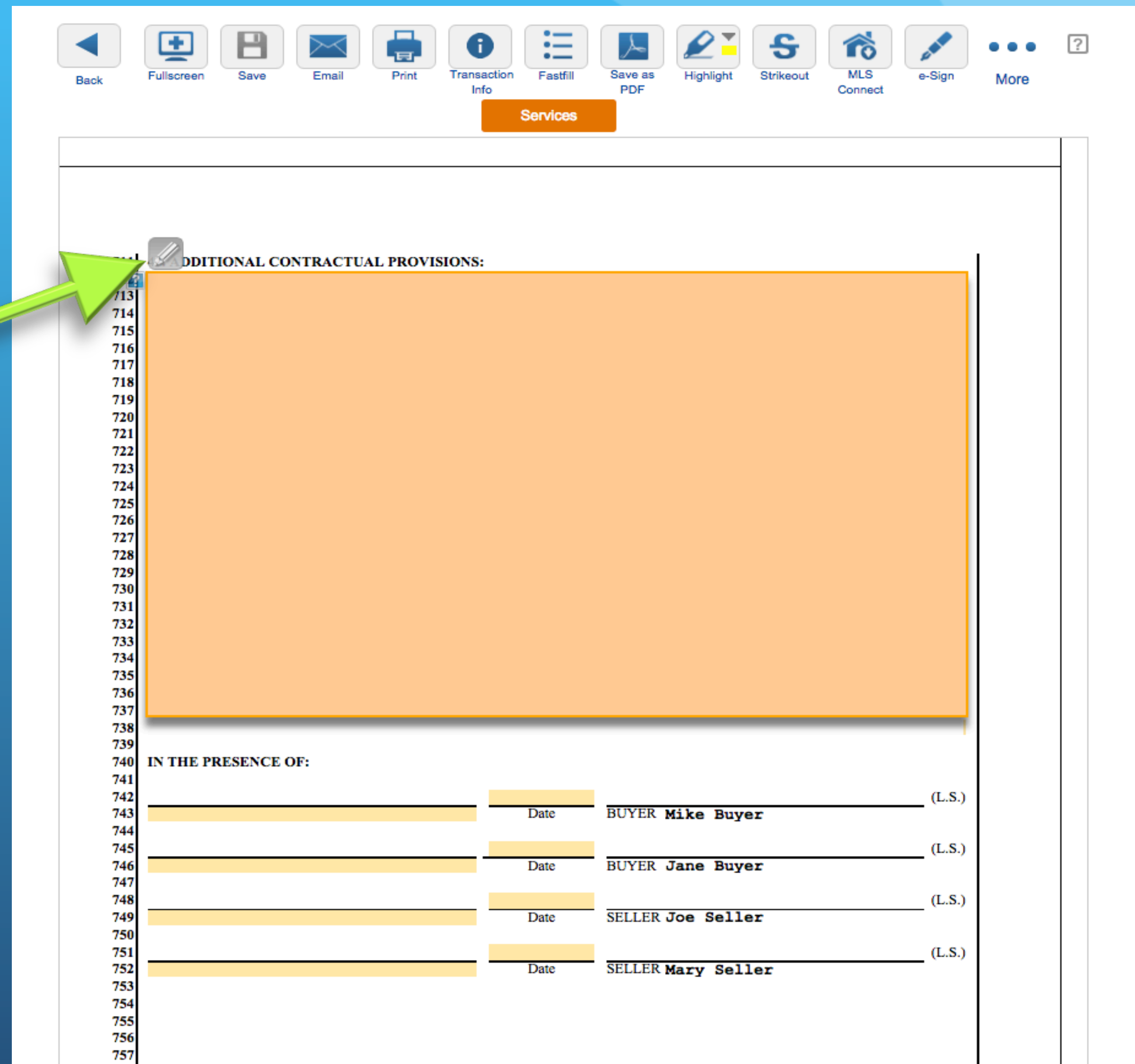
ADDING CLAUSES

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



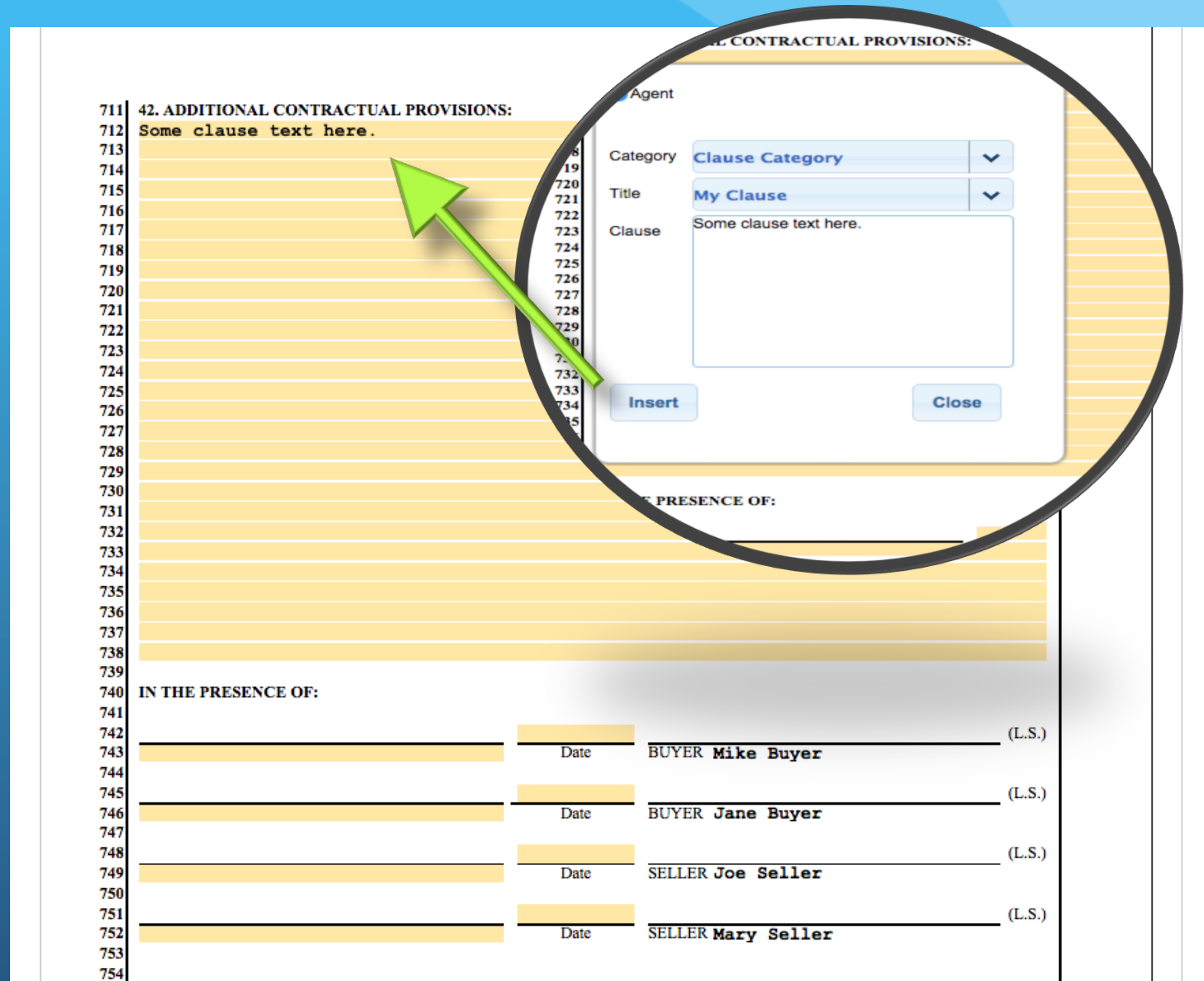
Adding Clauses – Inserting Into Forms

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



Adding Clauses – Inserting Into Forms

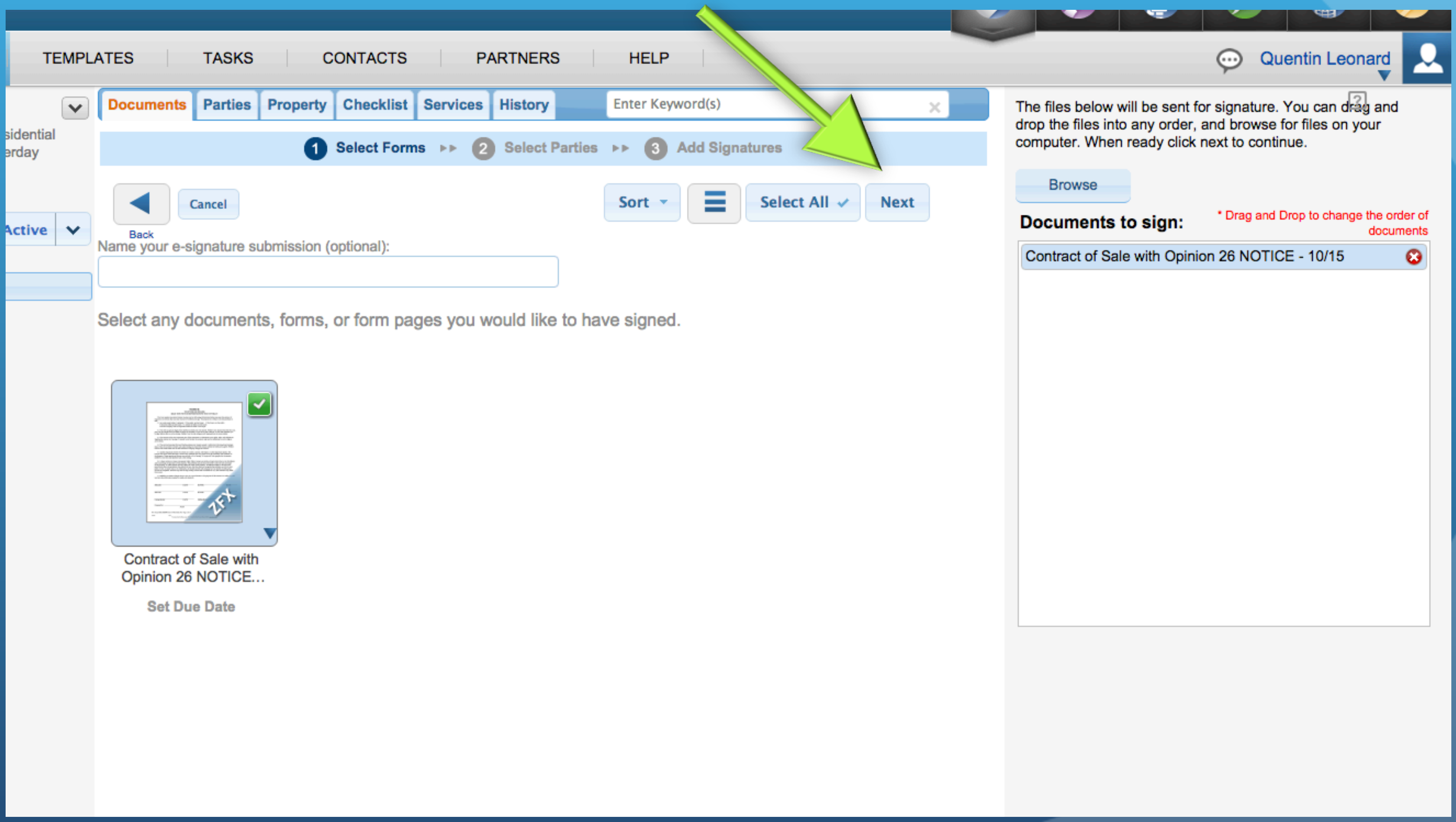
- Find the clause you want to add, then click "Insert" to place it into the form.



E-Sign

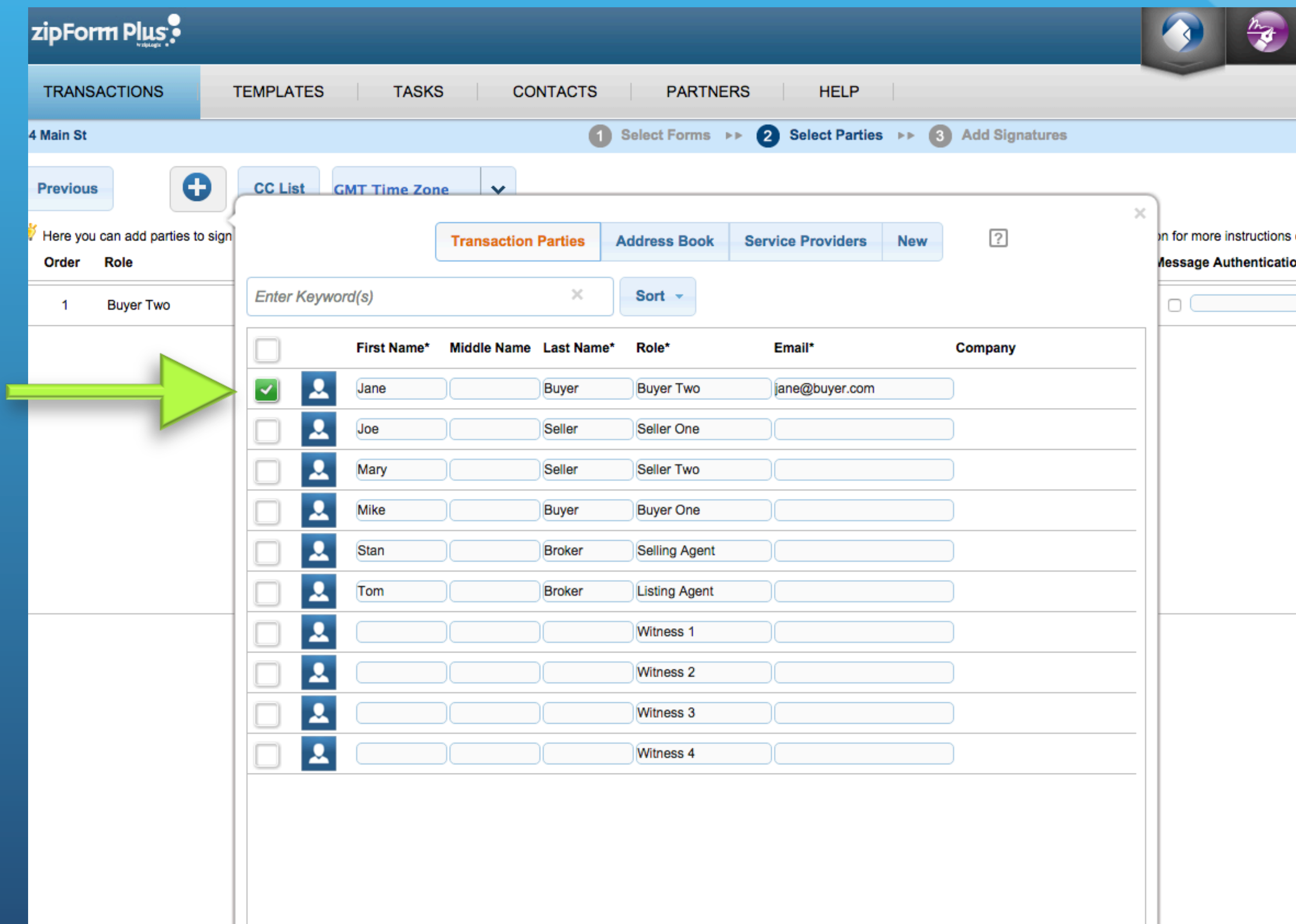
E-Sign

- 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"



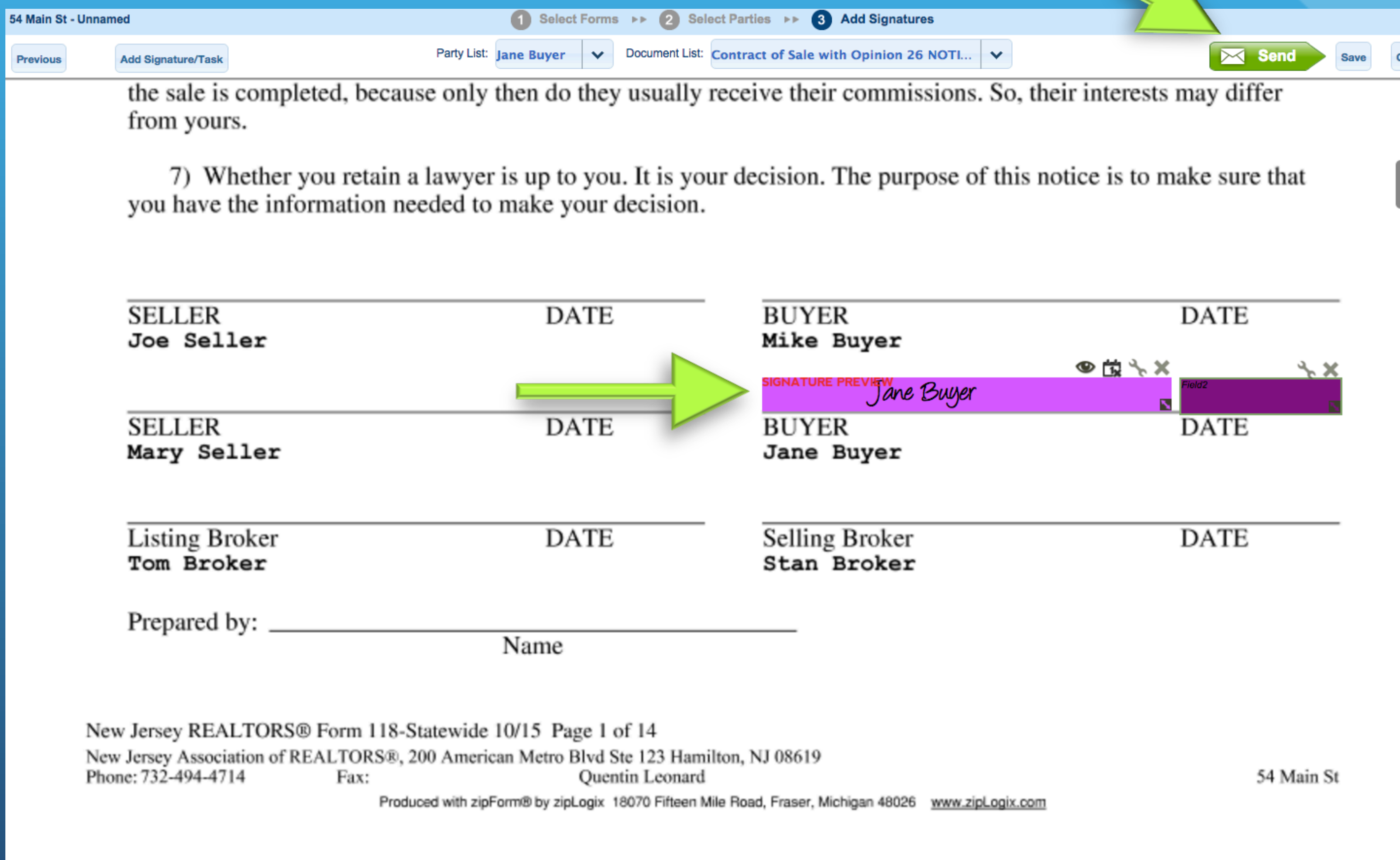
E-SIGN – ADDING SIGNERS

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



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".


54 Main St - Unnamed   1 Select Forms ▸▸ 2 Select Parties ▸▸ 3 Add Signatures

Previous   Add Signature/Task   Party List: Jane Buyer   Document List: Contract of Sale with Opinion 26 NOTI...   Send   Save

the sale is completed, because only then do they usually receive their commissions. So, their interests may differ from yours.

7) Whether you retain a lawyer is up to you. It is your decision. The purpose of this notice is to make sure that you have the information needed to make your decision.

SELLER **Joe Seller**	DATE	BUYER **Mike Buyer**	DATE
SELLER **Mary Seller**	DATE	BUYER **Jane Buyer**	DATE
Listing Broker **Tom Broker**	DATE	Selling Broker **Stan Broker**	DATE

SIGNATURE PREVIEW Jane Buyer

Prepared by: ______________________________
Name

New Jersey REALTORS® Form 118-Statewide 10/15 Page 1 of 14
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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.