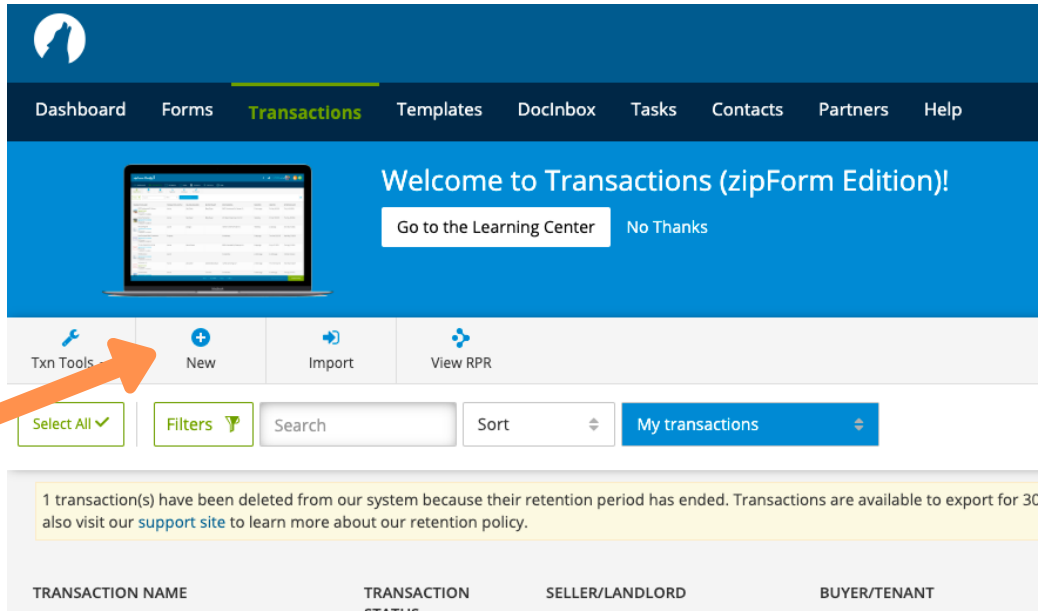
Creating a NEW OFFER | CONTRACT for a Buyer in ZipFormPlus

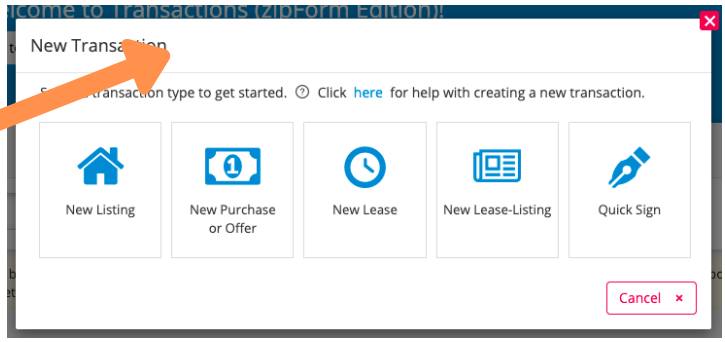
To create a new offer, contract or transaction for a buyer in ZipFormPlus you must first log in to your zipformplus.com account.

To simplify the setup process, have the home's address and MLS number ready.

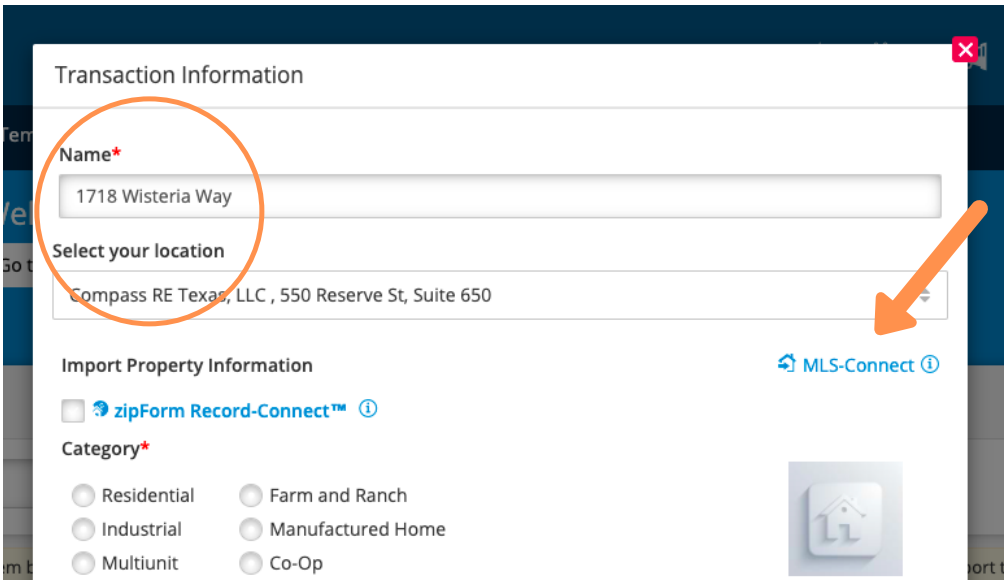
From your main dashboard, click the "New" button to start a new transaction.



Choose "New Purchase or Offer" from the pop-up window.



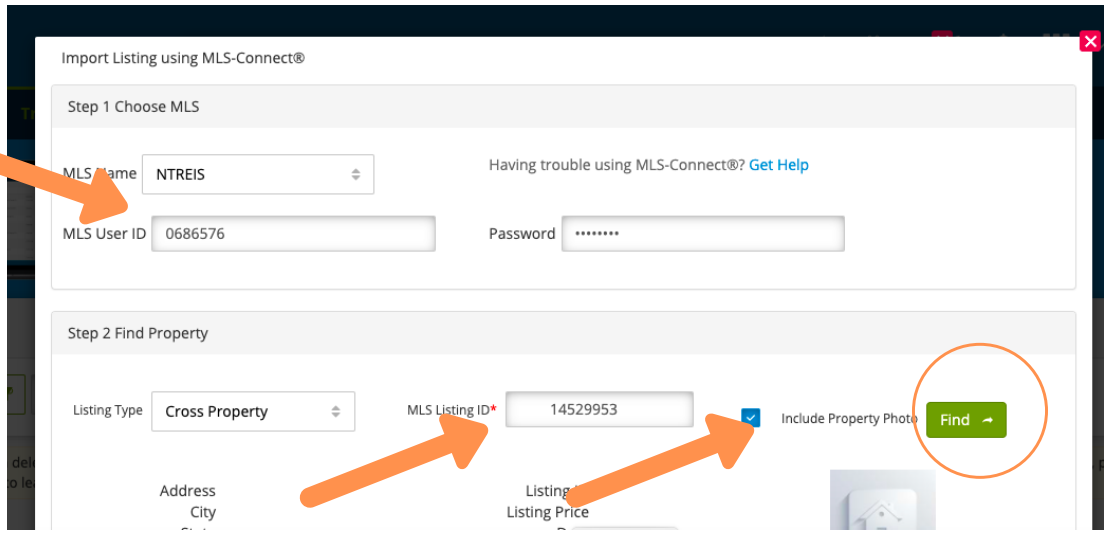
For the Name of your file, use the property's address.



Then click MLS Connect to enter the MLS number for the property.

Use Your MLS user ID and password information

Enter the MLS number, check the "Include Property Photo" box and then click "Find".



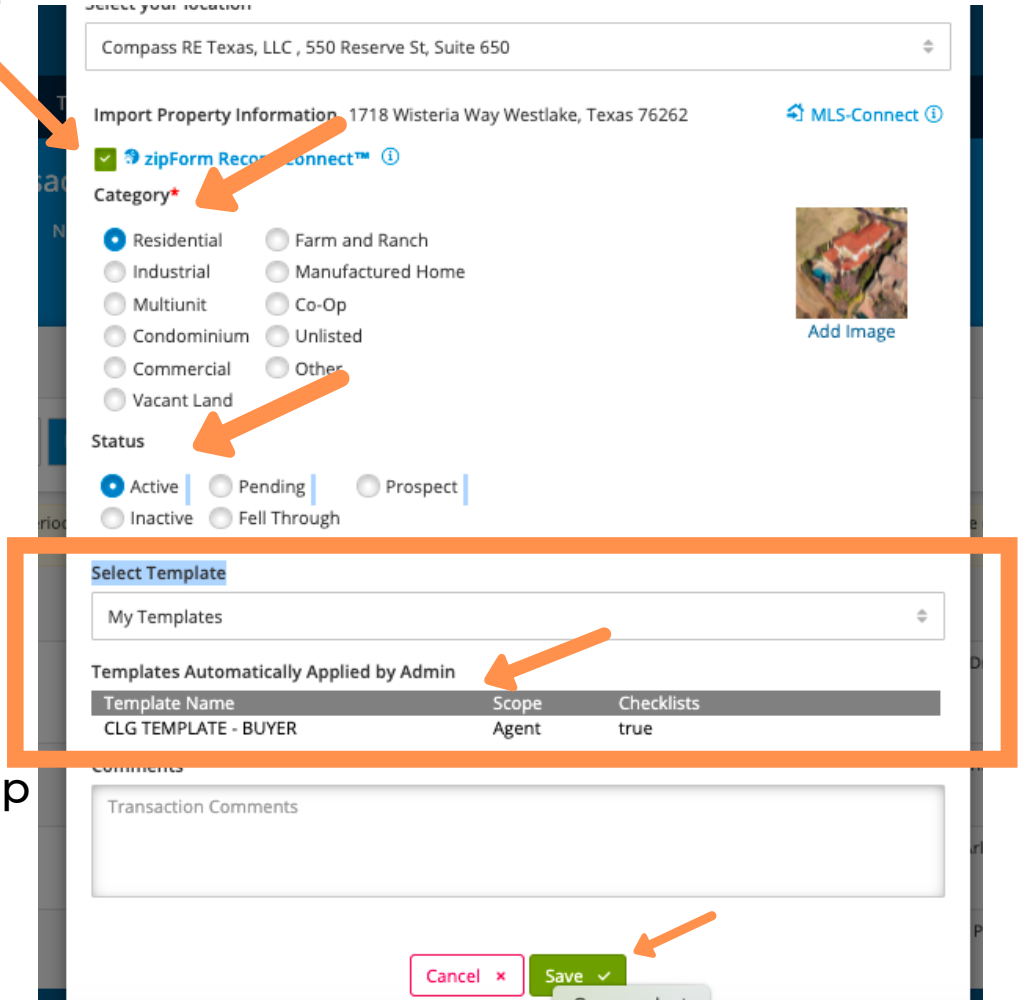
Once the property and listing information is connected, click the "Use Listing" box. This will connect the data in the MLS to your transaction to assist with populating fields within the documents.

Now that the MLS data is connected, you also need to connect the tax information. This is done by checking "ZipForm Record Connect"

Choose your Category and the current status of the transaction.

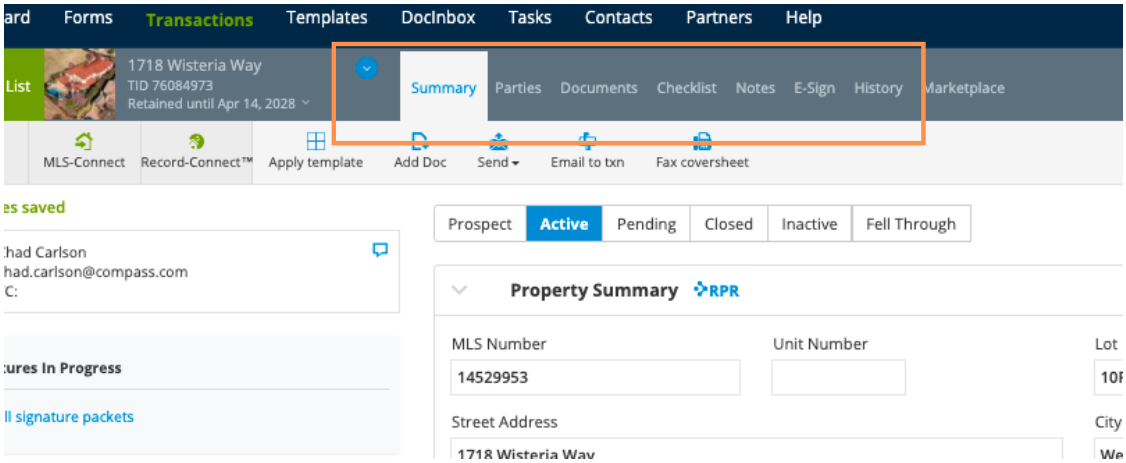
If your template is not automatically applied, then choose your template from the drop down menu in My Templates.

Press Save.

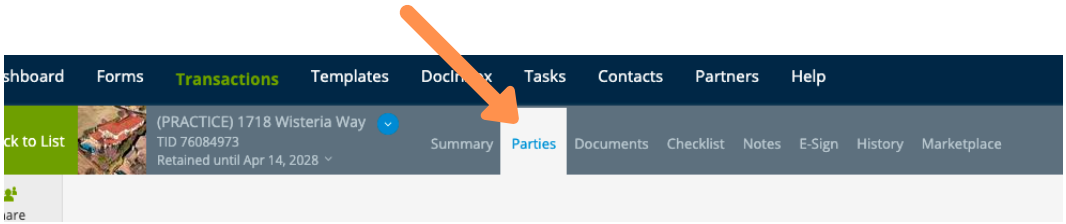


Record Connect will ask you to verify the proper format of the seller's name(s) from tax records and after clicking "yes" your file will be created.

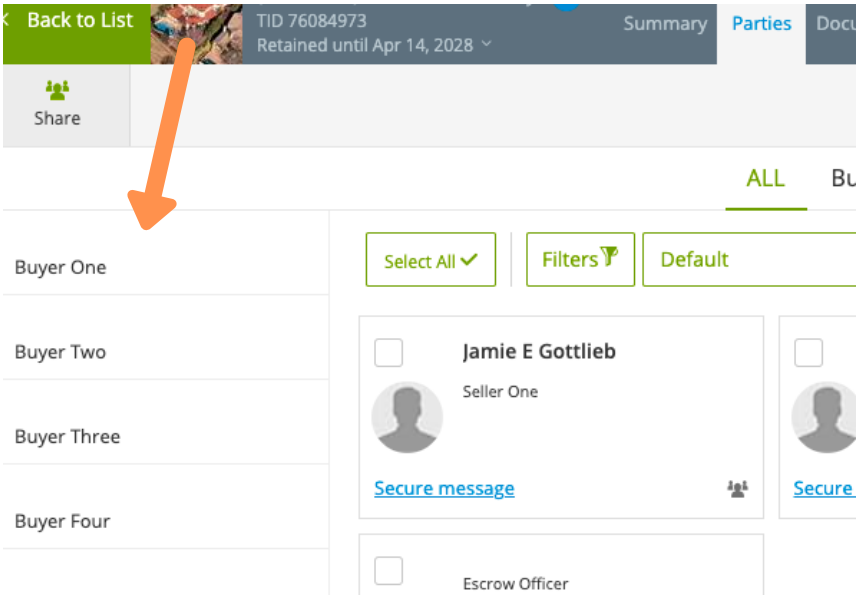
You will be directed to the Transaction Summary Page where you can add and complete as many of the transaction details as possible.



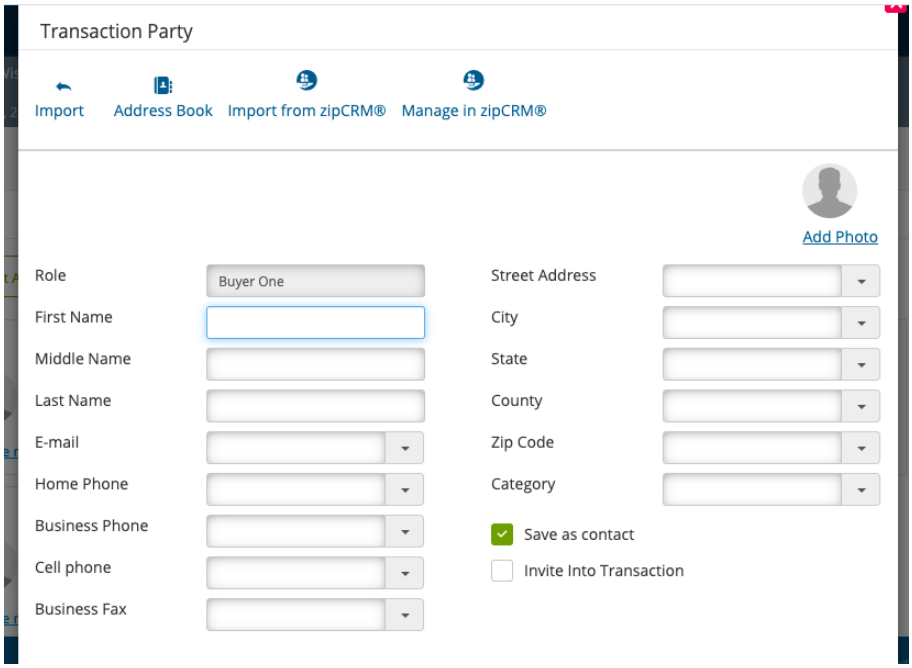
Choose "Parties" and to add the information for the Buyer(s) and other parties relevant to the transaction.



Scroll down the list on the left, choosing each party you wish to add, including Buyer(s), Seller(s), Listing Agent, Escrow Officer, etc.

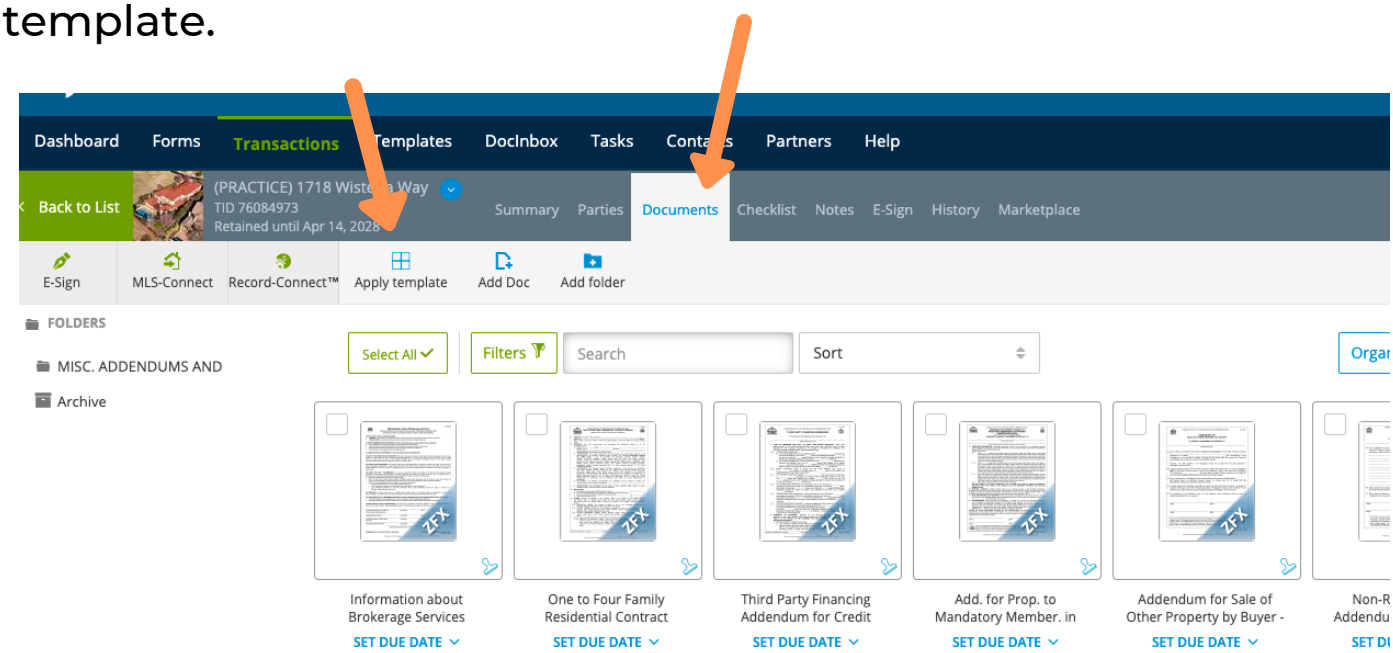


Complete as much information as possible.



From the "Documents" tab you can begin to complete the documents for your transaction.

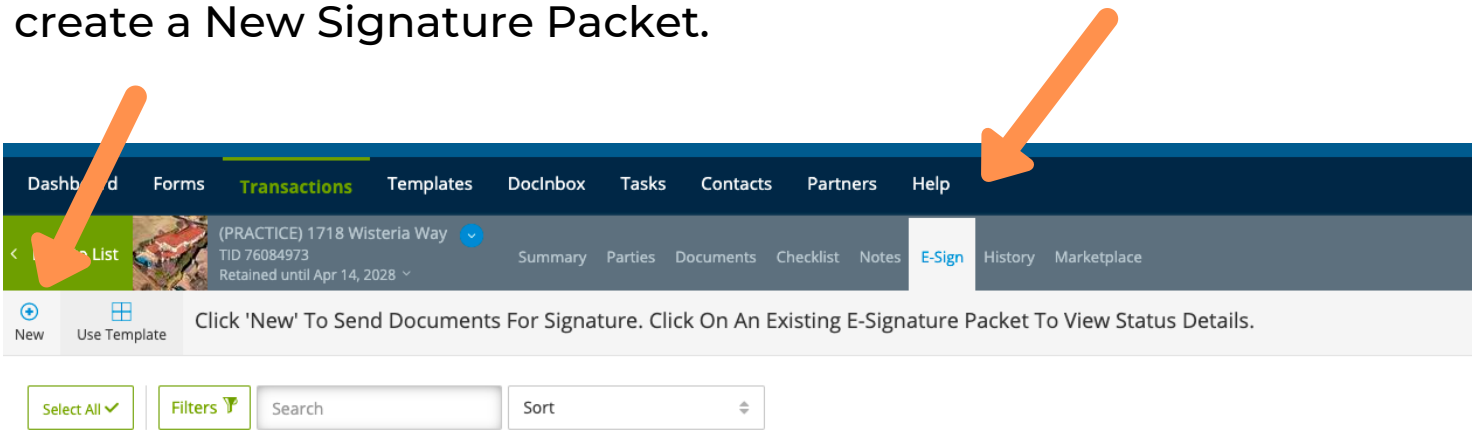
If in the initial setup, you applied the CLG Template for Buyers, your required documents should be preloaded for you. If the documents are not preloaded, you can apply the template by clicking the "Apply Template" tab and choosing the appropriate template.



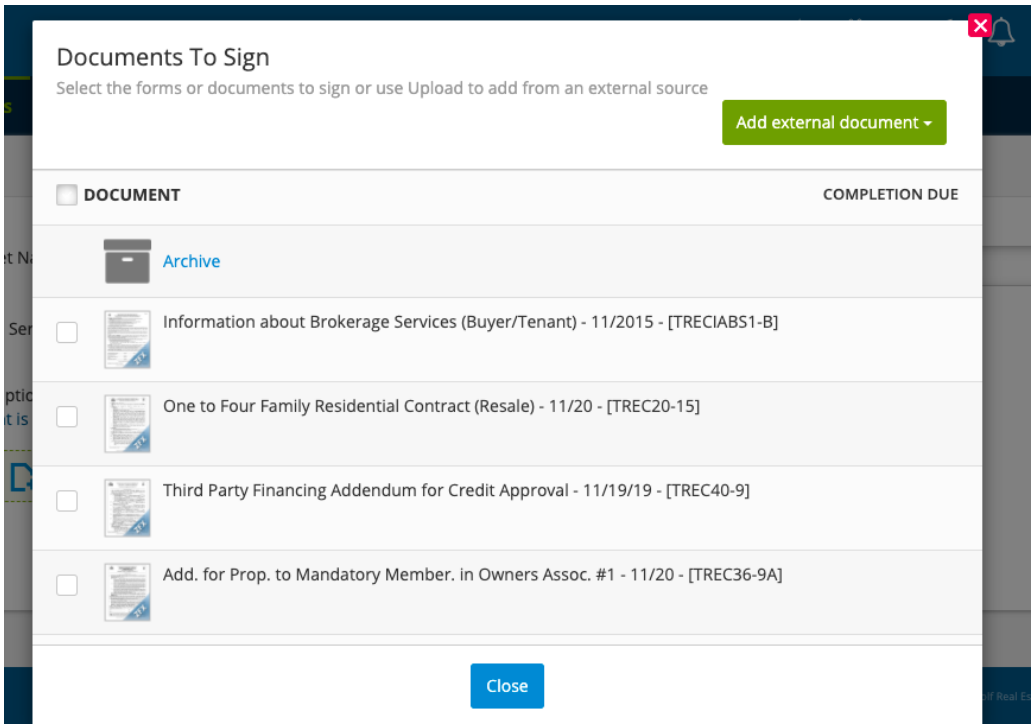
Click each document and complete the information for your contract and it's addenda. Once the information is entered, choose "save" and the "back" button to go back and choose the next document.

Sending Documents for Signatures

Choose "E-Sign" from the transaction menu. Choose "New" to create a New Signature Packet.

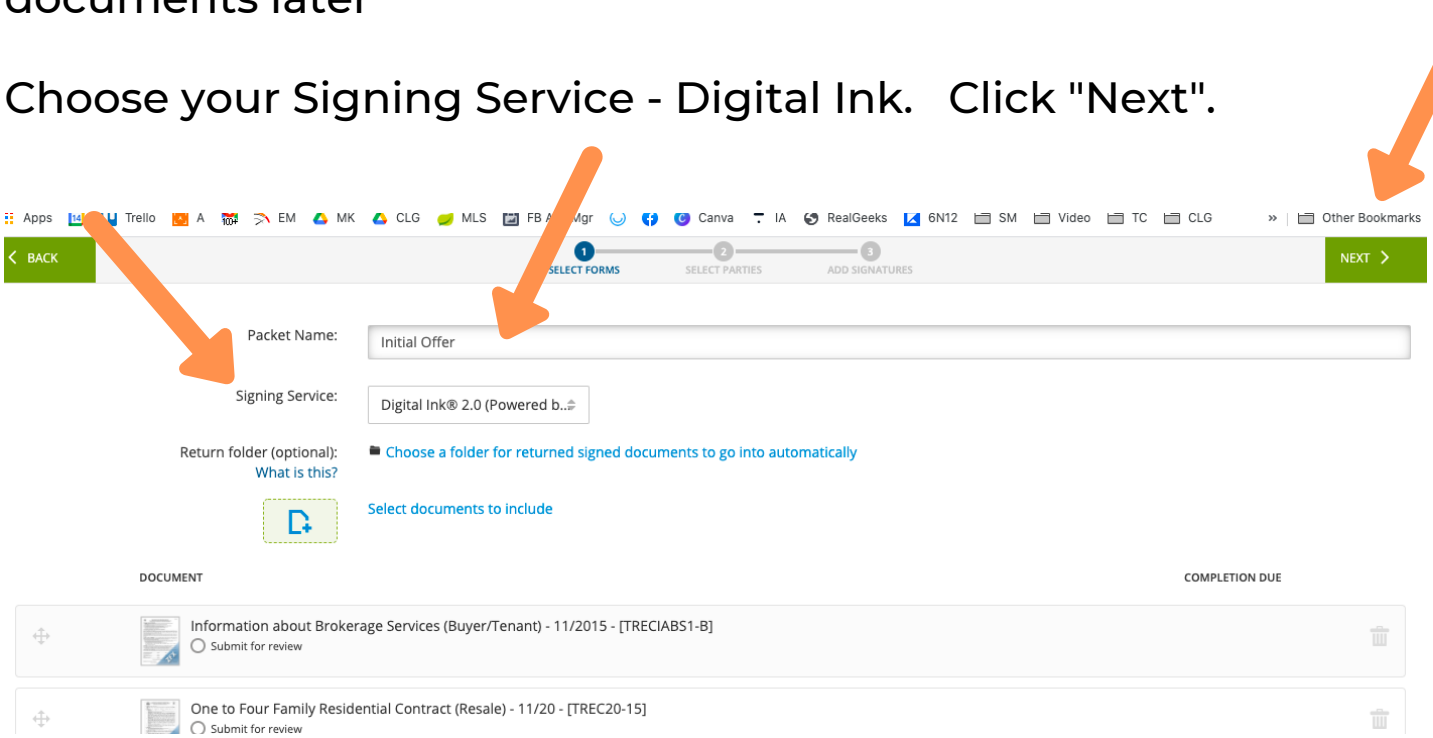


From the pop-up window, choose the documents you want to send for signatures. Once all the documents are chosen, click "Close".

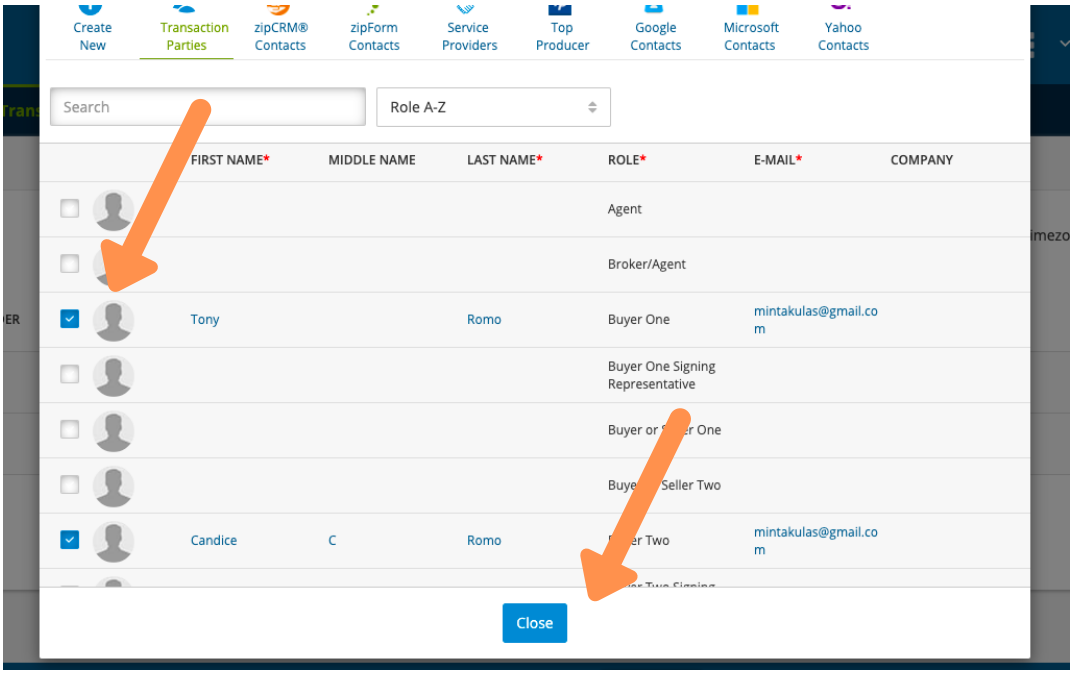


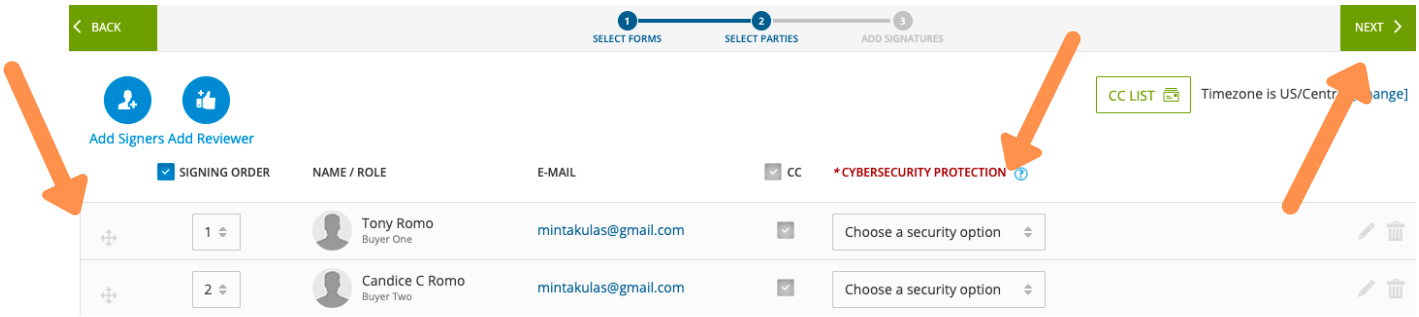
Name this signature packet to make it easier when finding documents later

Choose your Signing Service - Digital Ink. Click "Next".



Choose everyone in the transaction who needs to sign the documents in this packet, in the order you want them to sign.
Click "Next"





Confirm you have all signers in the packet. You can rearrange the signing order by clicking and dragging them using the "+" on the far left.

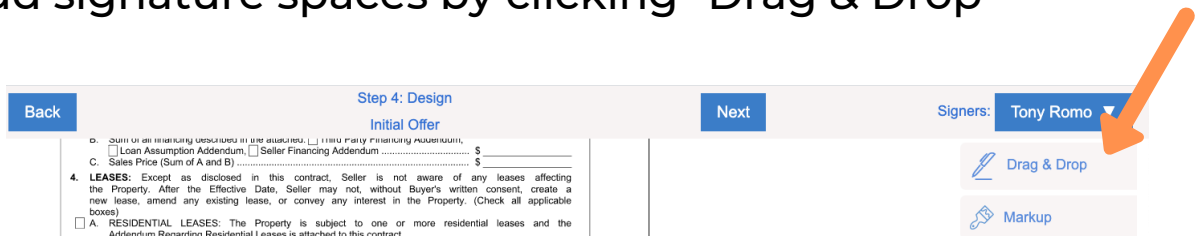
Leave the Security Option as it is. Choosing a different security option could result in additional fees.

Click "Next"

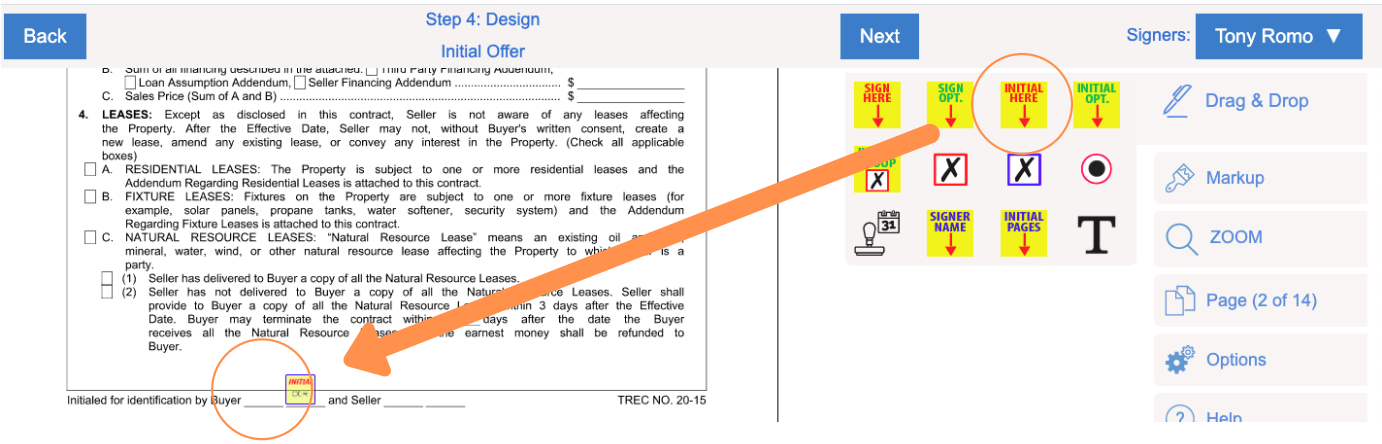
You will be directed to the signature design/setup page. Scroll down each document and assign the signature and initial spaces on each form. Documents from the templates folders, that are fillable will usually auto populate signature

From the drop down menu on the left, choose the signer you will be assigning signature spaces for.

If a signature or initial block is not pre-assigned, you can add signature spaces by clicking "Drag & Drop"



Click and hold on the "Sign Here" or "Initial Here" (or the appropriate instruction) and drag to the location where you'd like to insert it.



Once you've added all the blocks (signature, initial, etc.) click the "Next" box.

The final pop up box will allow you to write a subject line and message when sending to the client. Once you are ready to send, click "Send Invitations". Your clients will receive an email with an invitation to sign.

Once the client(s) have completed the signing process, you will receive an email letting you know the signing is complete and it will include the documents you can download.

With in the document section of the transaction in ZipFormsPlus you will find the completed signature packet as a folder. All the signed documents are inside the folder where you can download or send them by email.