zipTMS®

User's Guide

Closing a Transaction

FAMILY of COMPANIES

REAL ESTATE / MORTGAGE / INSURANCE / TITLE
RELOCATION / RENTAL MGMT

CLOSING

Agent Steps

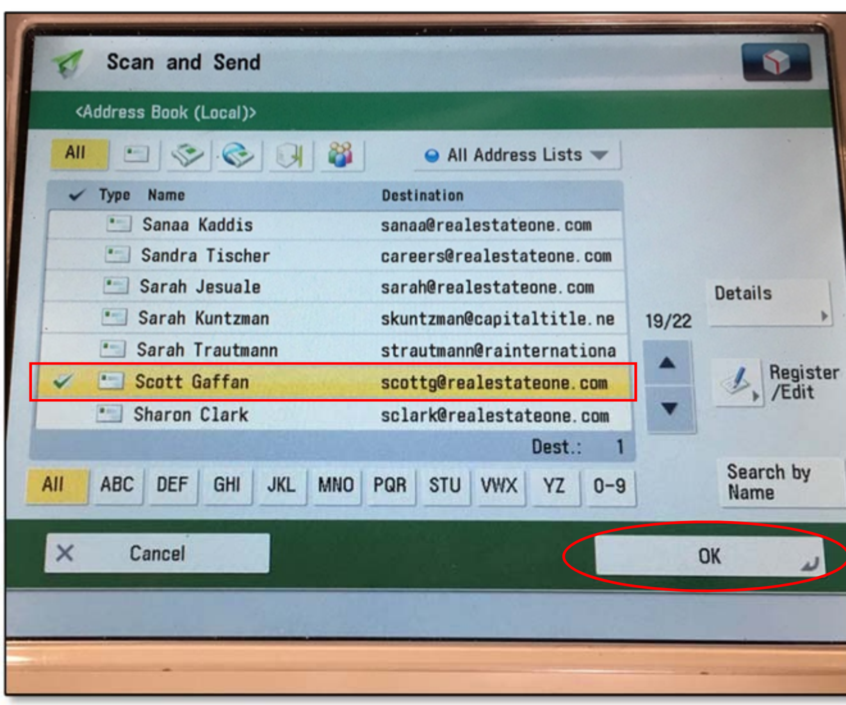
- After closing, scan closing package with commission check on top to the **Closing Docs folder** in the zipTMS transaction and physically turn in the check to your office administrator.
- Click the "**Approved**" button found on the **Summary page** of your transaction.
- Select **Needs Review** and add directions to comment section (**i.e. Closing docs uploaded, check in closing bin, please process**)
- If the transaction is in a status of "**Not Approved**", click on "**Not Approved**" to read the comment from your office administrator that details why the transaction was not approved add the missing information or documents to the transaction.
- Once the missing information has been added, select "**Not Approved**" and then select **Needs Review.** Add directions to the comment section (**i.e. Missing sale docs and closing docs uploaded, check in closing bin, please process**)

After your transaction has closed, scan your closing package with the commission check on top. Turn the actual check in to your office administrator.

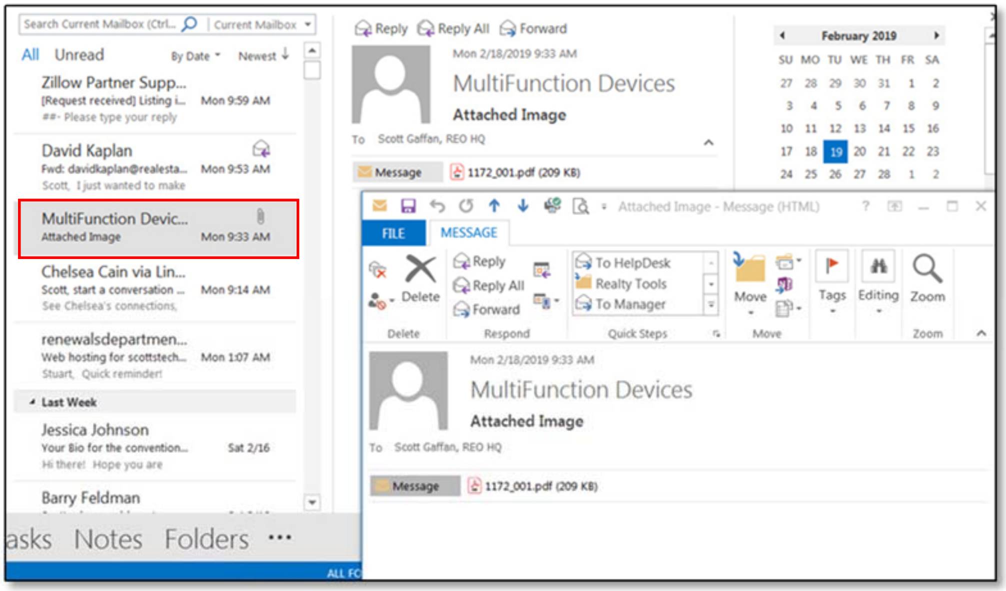
You can scan your package directly to the transaction by entering the transaction email address into the **To** field of you scanner's email options or email it to yourself and then forward on the message with the scanned documents attached, to the transaction email address.

Scan your closing package using your scanner's **Scan and Send** option.

Choose to send the package to yourself or enter the transaction's email address and send it directly to your transaction.

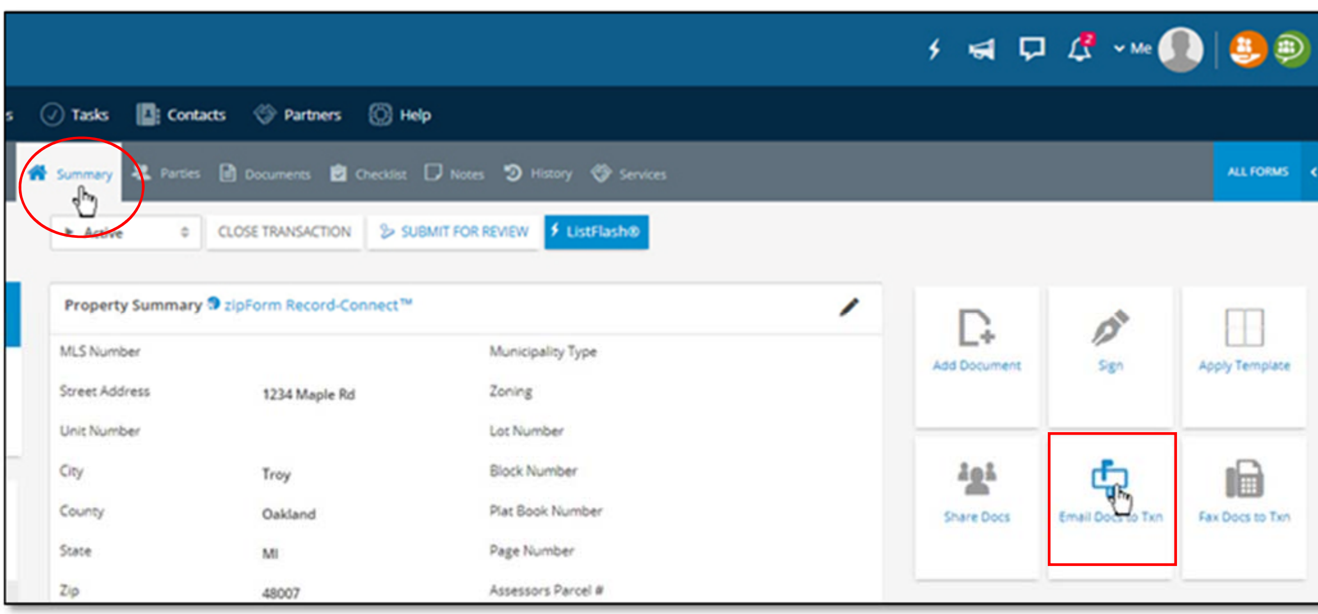


Your scanned package email should be in your inbox.

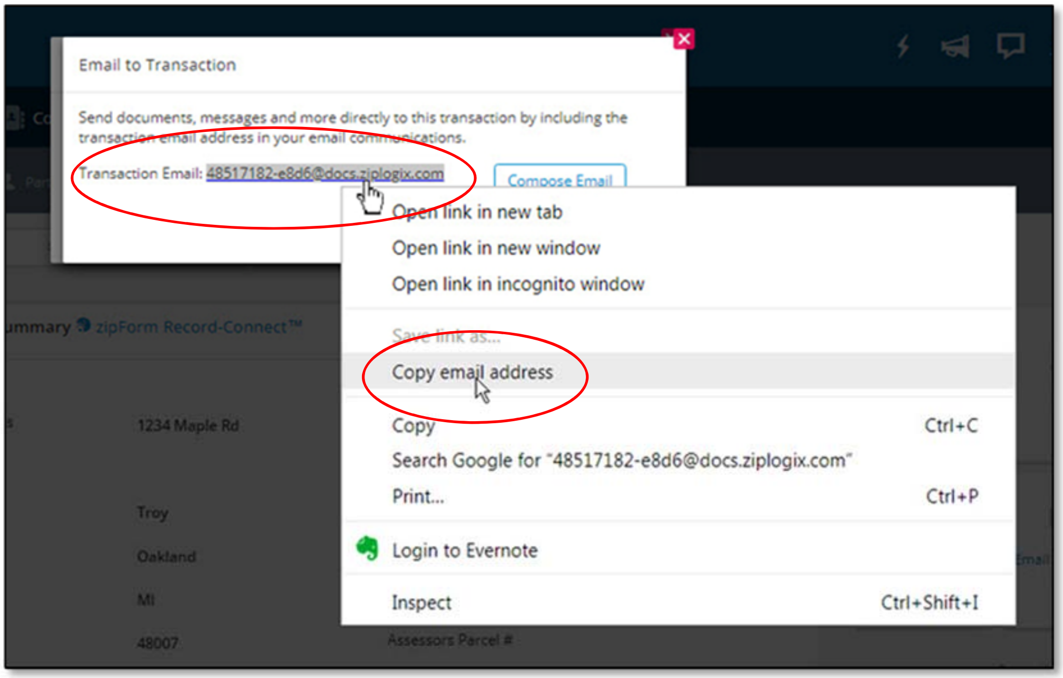


To forward an email directly to your transaction, you will need your transaction's email address.

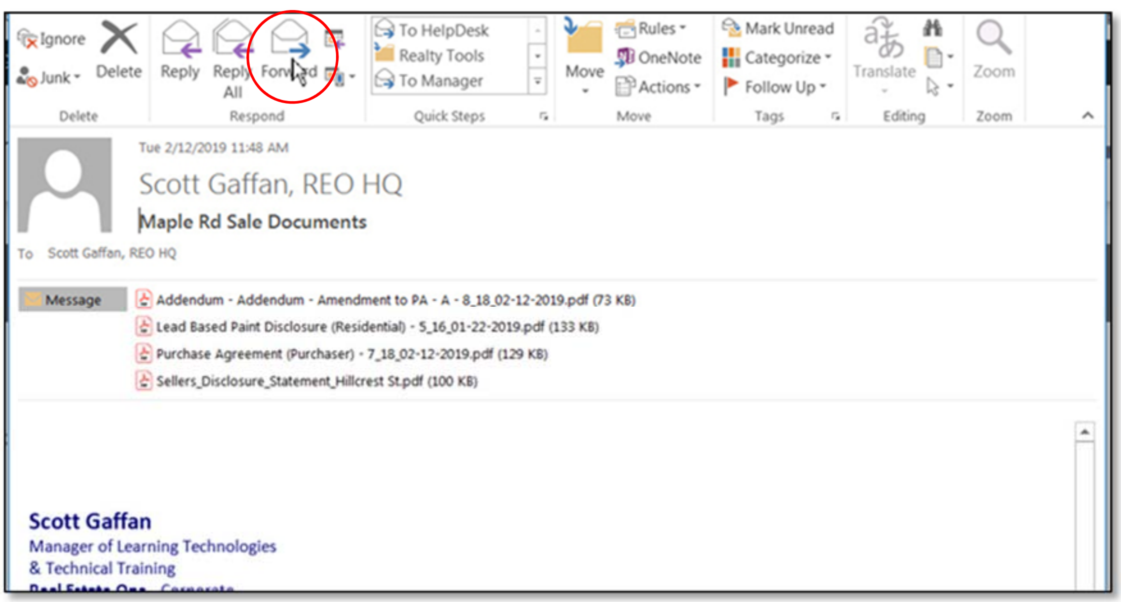
Open your transaction in zipTMS and select the **Summary** tab then choose **Email Docs to Txn**.



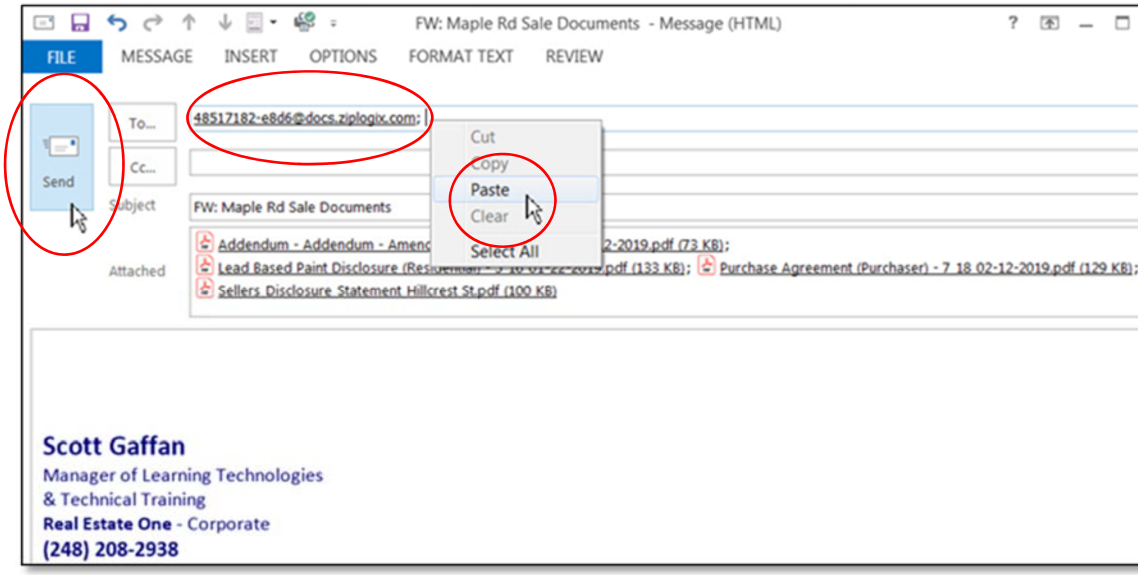
Select the transaction's email address. Right click on the selected address and choose **Copy** or **Copy email address**.



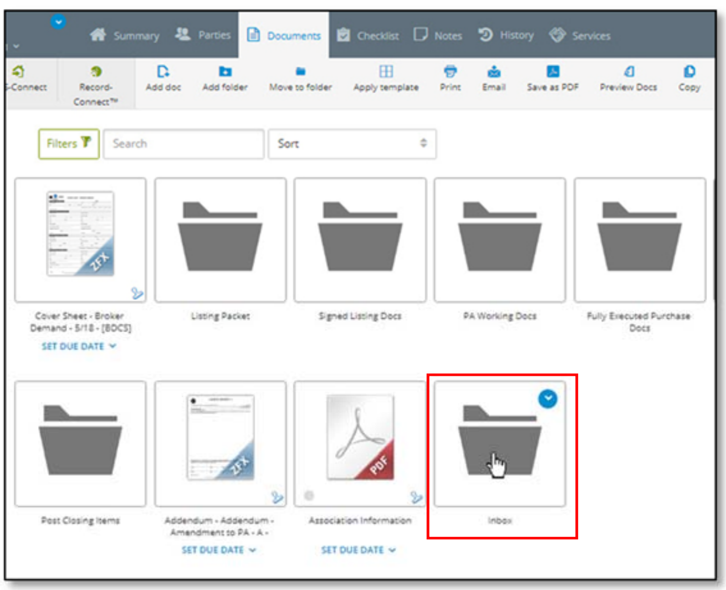
Open the email that you received from your scanner containing all of the closing documents and choose **Forward**.



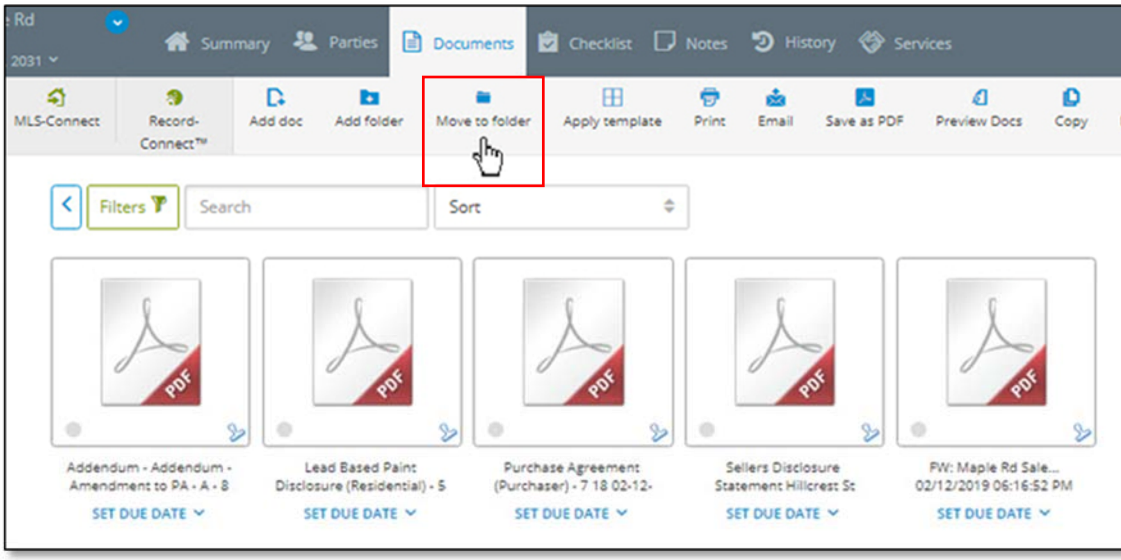
Paste your transaction's email address into the **To** field and choose **Send**.



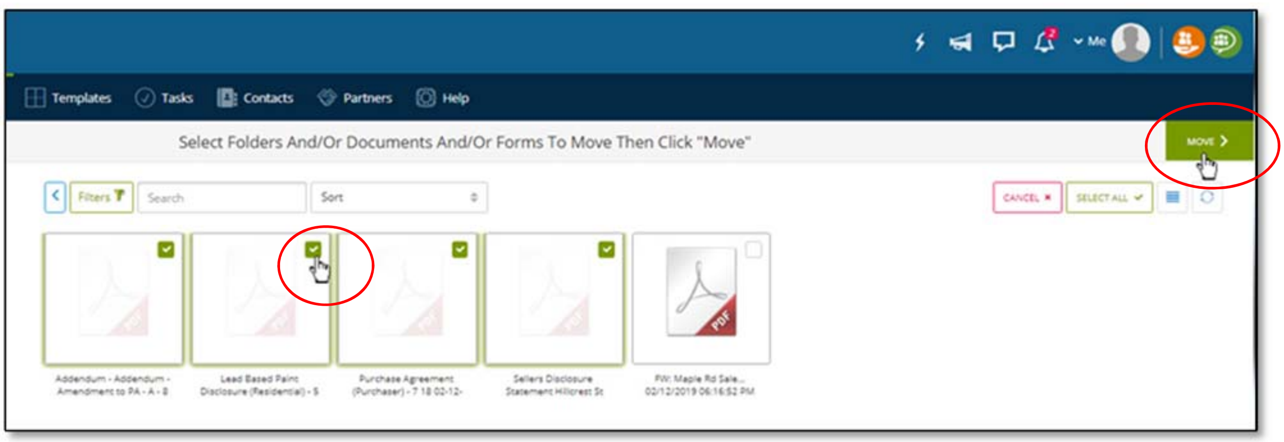
Go back into your transaction's **Document's folder** and a new folder called **Inbox** should be added to your list of folders. Select it to open it.



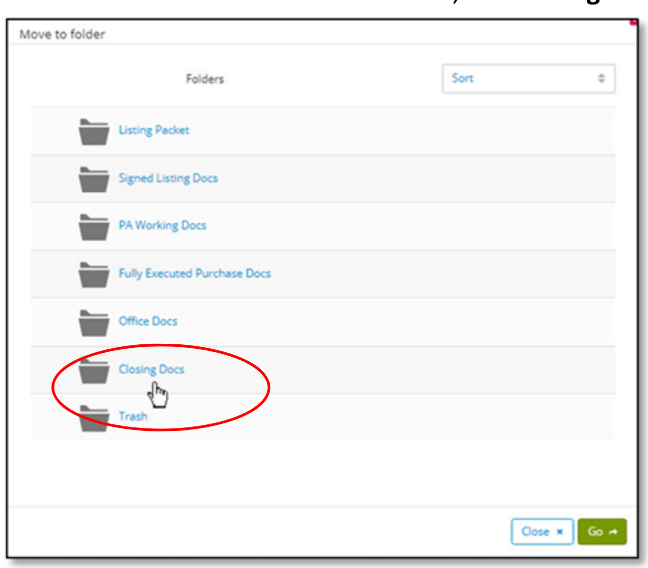
All of the documents that were attached to your email should be in your inbox folder as well as a PDF of the email message itself. Choose **Move to Folder** to move your documents to the **Closing Docs folder**.



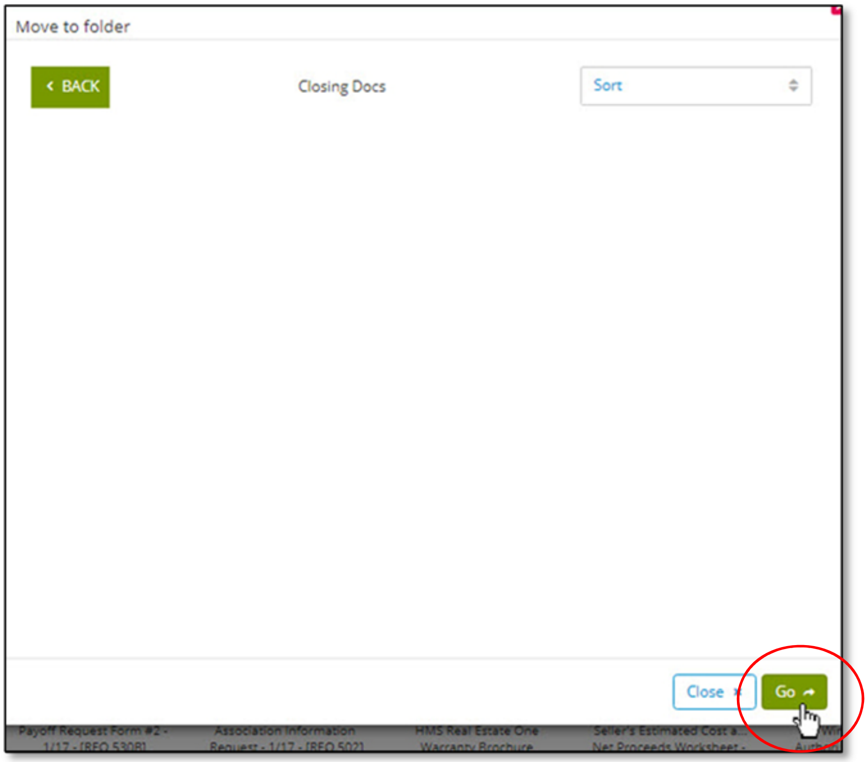
Select the documents that you would like to move and then choose **Next**.



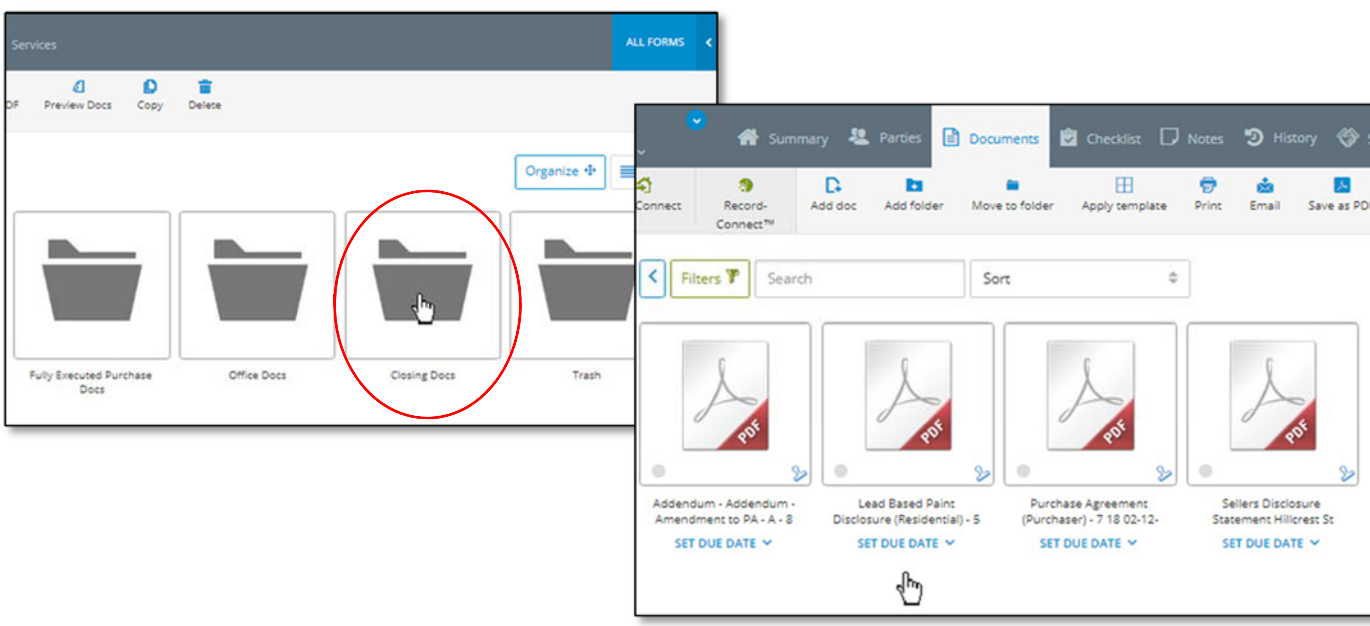
Select the folder that you would like to move the documents to, the **Closing Docs folder**.



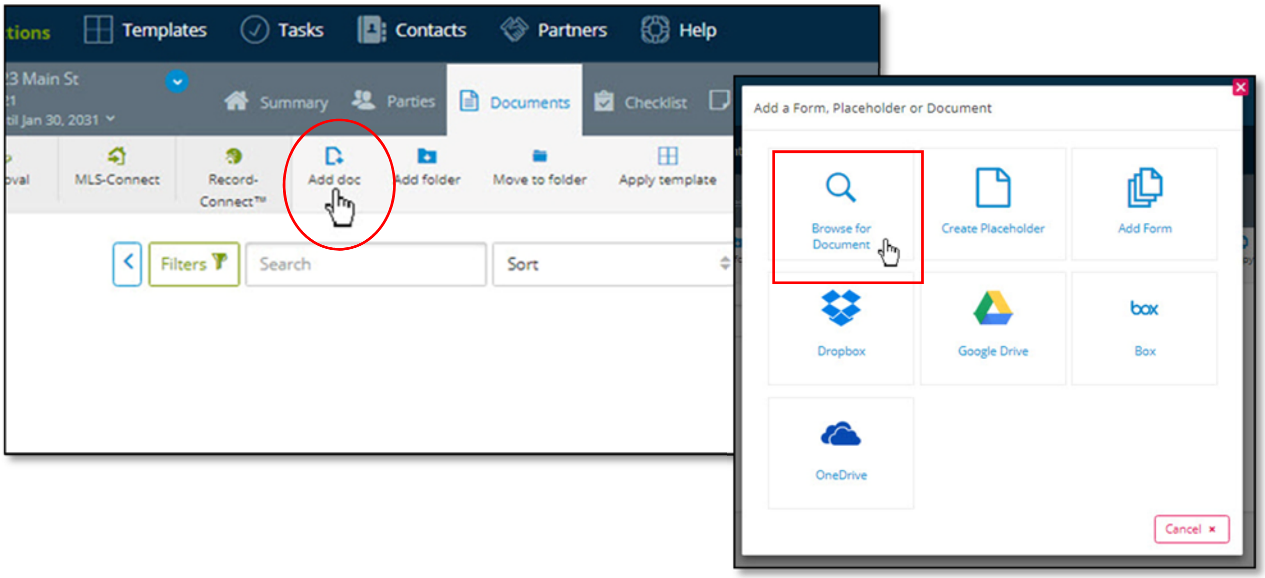
Choose **Go**.



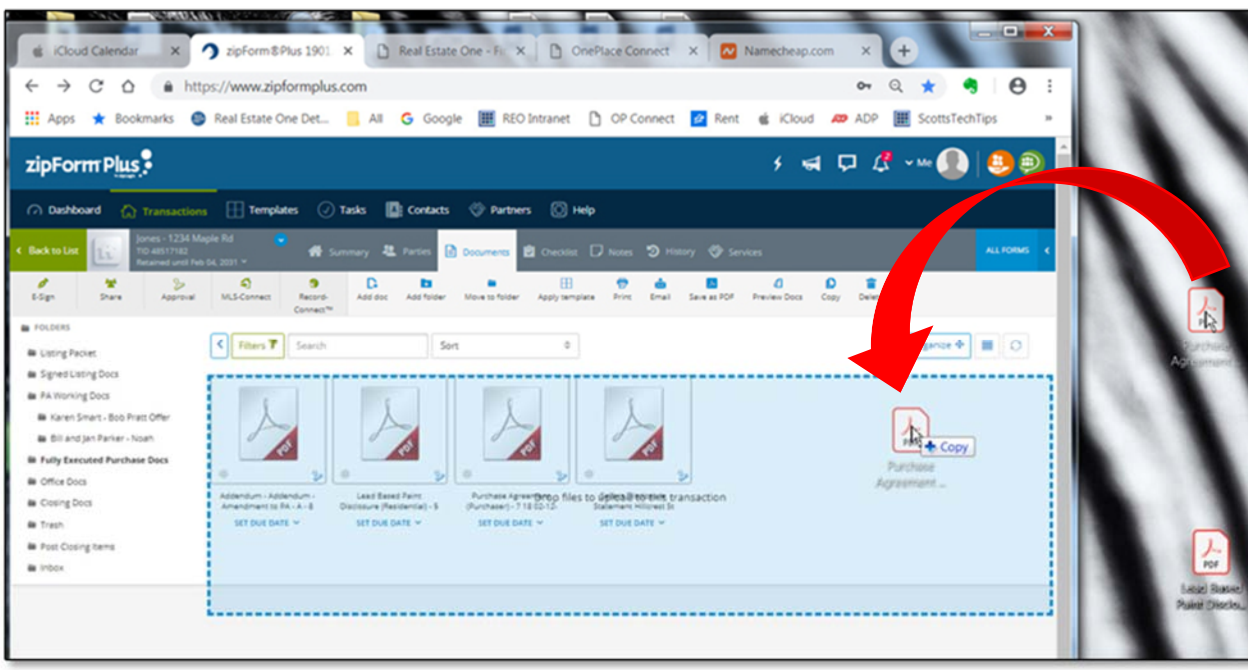
Open your **Closing Docs folder** and check to make sure that the files all transferred successfully.



If your scanned closing docs are already on your computer, you can upload them from your computer to the transaction's **Documents Folder** by choosing **Add Doc.**



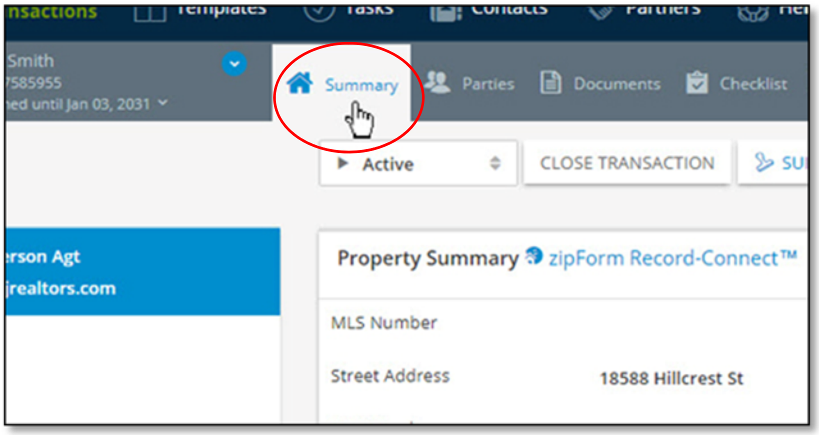
Or you can drag and drop them into your **Documents folder** or directly into your **Closing Docs folder** from your computer.



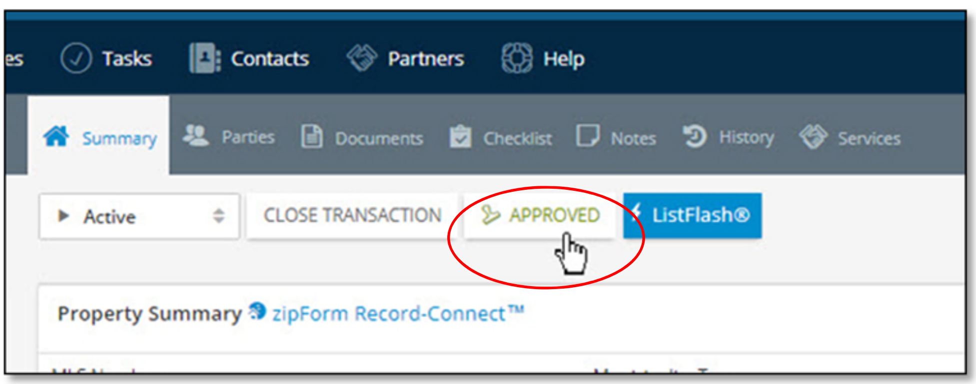
Submit for Review

Complete a final review of all closing documents to make sure that they have all been successfully transferred to your **Closing Docs folder**. When you've completed your final review, you're ready to send your transaction on to be reviewed by your office administrator.

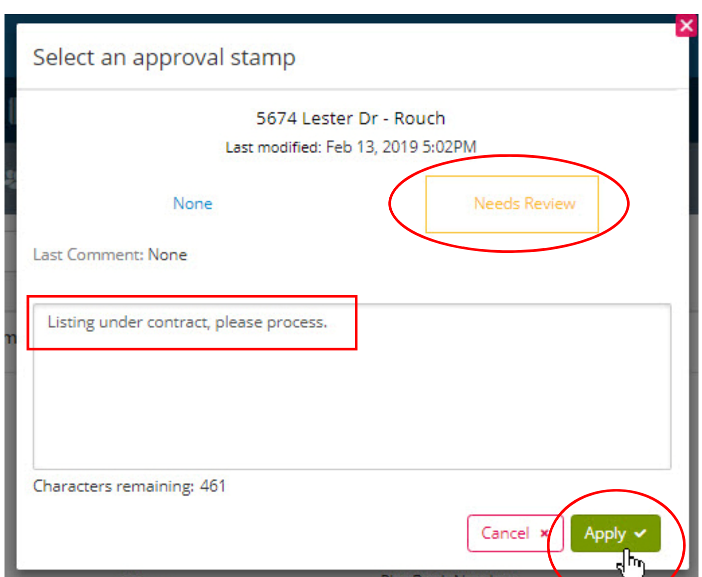
Return to the **Summary** page of your transaction by selecting **Summary**.



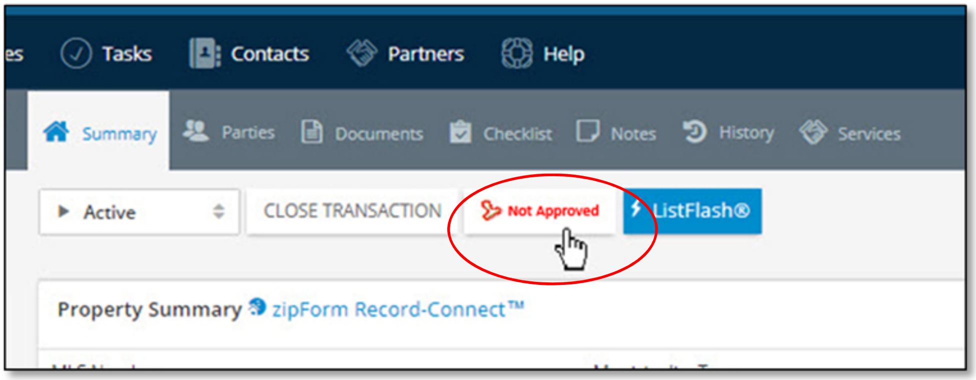
Choose **Approved.**



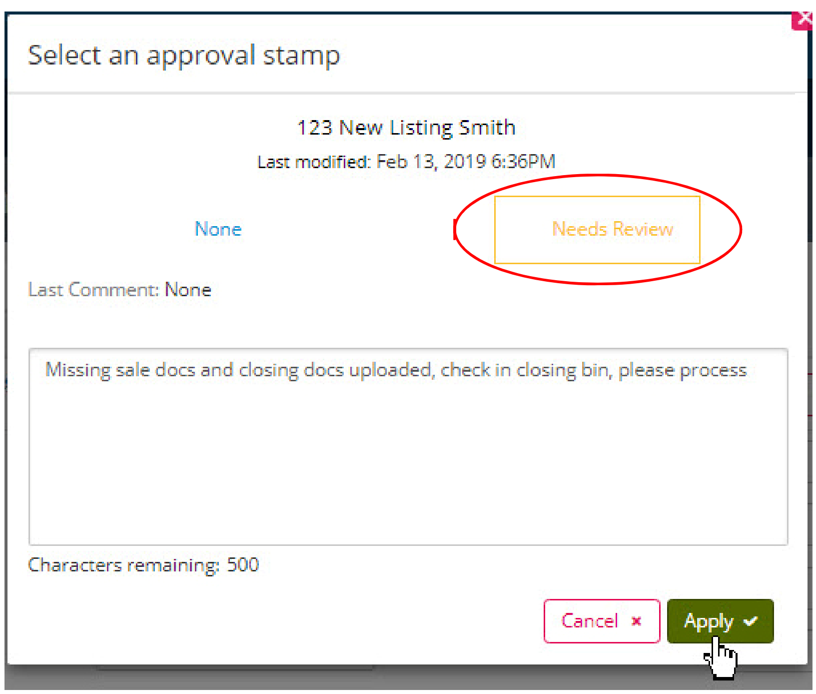
Add a comment to notify your office administrator what is being submitted - **Closing docs uploaded, check in closing bin, please process.** Choose **Needs Review** and then **Apply** to submit your transaction for review.



If the transaction is in a status of **Not Approved**, click **Not Approved** to read the comment from the office administrator that details why the transaction was not approved. Add the missing documents or information to the transaction.



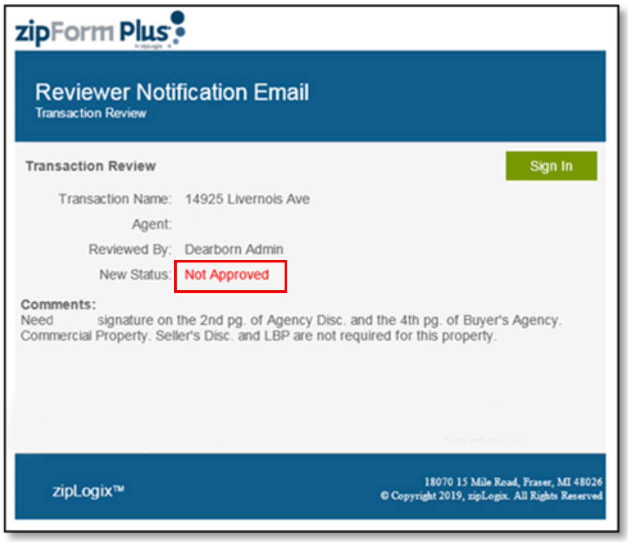
Once the missing information or documents have been added, select the **Not Approved** button again and then choose **Needs Review**. Add directions to the comment section - **Missing sale docs and closing docs uploaded, check in closing bin, please process**.

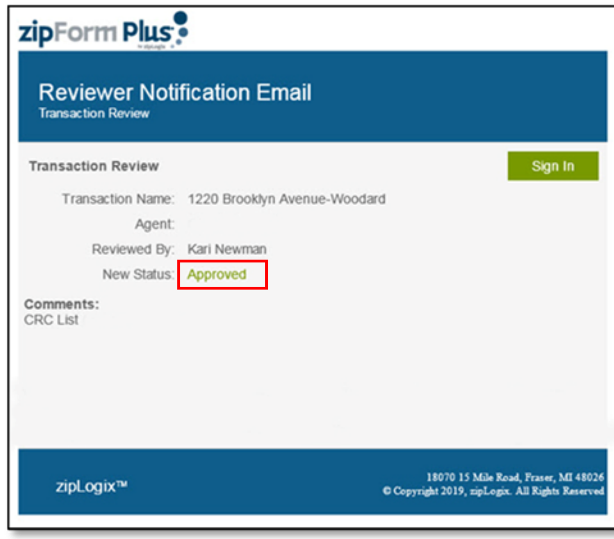


Your office administrator will review your transaction. You'll receive a notification when the review has been completed.

If it is determined that your transaction is missing something, you will receive a notification with the status of **Not Approved** with comments from your office administrator regarding what remains to be done to get the transaction approved.

If it is determined that your transaction has all of the required documents, you will receive a notification that your transaction has been **Approved**.





If your transaction was not approved, fix the issue and submit the transaction or the individual document back through for review again.