

zipTMS®

User's Guide

New Buyer / New Sale



FAMILY of COMPANIES

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

New Buyer/New Sale

AGENT STEPS: Buyer's Agent

Start a New Transaction (name as Last Name and then first name of the Buyer until there is a property address).

Apply Office or Personal Template for Purchase.

Add parties to the transaction in the Parties tab.

- Buyers
- Buyers' Agent (you)
- Title Company
- Buyer Lender (when available)
- Supervisory Broker

Prepare disclosures upon first contact.

- **Cover Sheet – Broker Demand**
- Agency Disclosure
 - Affiliated Business Arrangement Disclosure
 - Wire Fraud Acknowledgement
 - TRID Warning info sheet
- Designated Buyer Agency Agreement

Acquire digital signatures or ink signatures.

Obtaining digital signatures.

Select e-Sign with the zipTMS transaction.

Select the forms to be signed.

Set the return folder to "**Signed Agency Docs**".

*** The placeholders for signed listing documents will automatically be filled when the "Signed Listing Docs" folder is selected for return.**

Select the parties who will sign.

Add a note to signors.

Double check the package and SEND.

Obtaining ink signatures.

Select applicable documents to be signed and print.

Once signed, scan all to your email (or email to transaction).

Upload all docs to the zip transaction into the **Signed Agency Docs** folder.

Separate signed documents with the splitting tool and fill placeholders.

Advise client to obtain preapproval.

- Send client information to John Adams via the "Title, Mortgage & Inspections" link from the zipForm. Summary tab.
- Add preapproval letter to file by uploading.
- Add Buyers' Lender info to Parties Tab.

Show properties and select a desired home.

When ready to make an offer, prepare buyer forms package.

- Update **Cover Sheet – Broker Demand**.
- Disclosures from the Listing side.
- Purchase Agreement & any addenda.
- Acquire digital signatures or ink signatures as above; placing them in a **Working Docs** folder.

Present offer to List Agent for negotiation and signatures by printing or emailing.

Obtain fully executed package from Listing Agent.

Place fully executed agreement and all related documentation in the **Fully Executed Purchase Docs** folder.

Split documents using the splitting tool and fill placeholders.

Obtain EMD check and Receipt and Agreement form with signatures from Buyer.

EMD may be in the form of Check, Wire Transfer or Electronic Deposit via Deposit Express (instructions on page 45).

Obtain co-op commission letter, if applicable/necessary, and upload.

Update the transaction name in zipForm to reflect the standard naming “Smith, Mary - 123 Main St”

Submit Receipt and Agreement form and EMD (if a paper check).

- Paper check and Receipt and Agreement form is placed in the EMD secured lockbox for admin to process.
- Check with Admin for confirmation of wire or electronic deposits.

Upon verification of documents, submit the file to the office digitally by clicking **SUBMIT FOR REVIEW** on the Summary tab in the zipForm transaction.

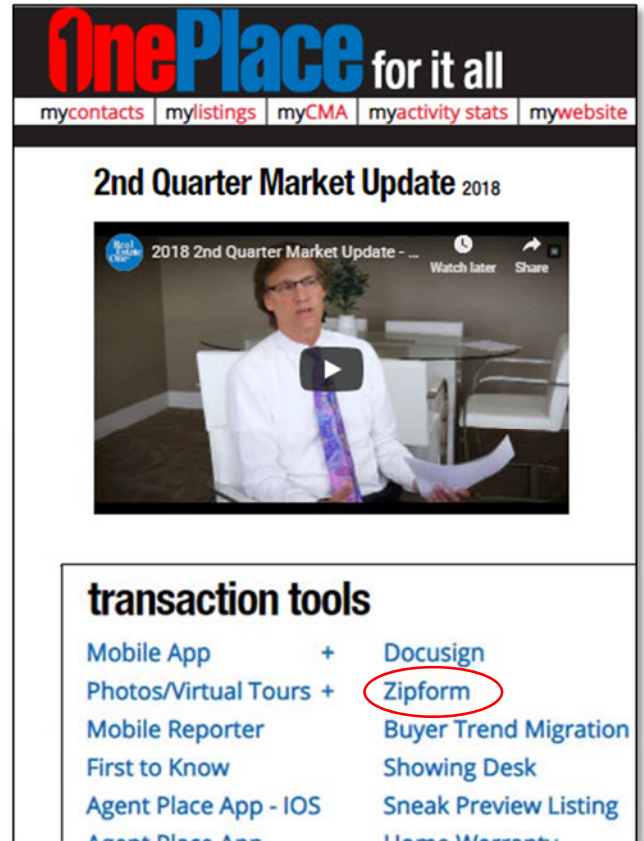
- Add a comment to tell Admin what is being submitted (i.e. New sale please process).
- Note which form of EMD has been submitted in comments (Check, Wire Transfer or Electronic Deposit).

Send **Purchase Agreement** and related docs to lender.

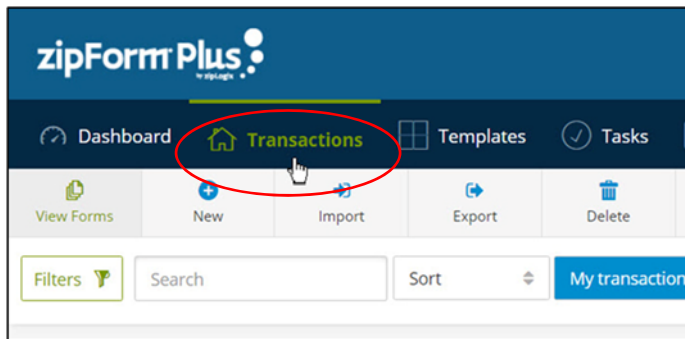
Manage all contingencies and due dates.

New Buyer / New Sale

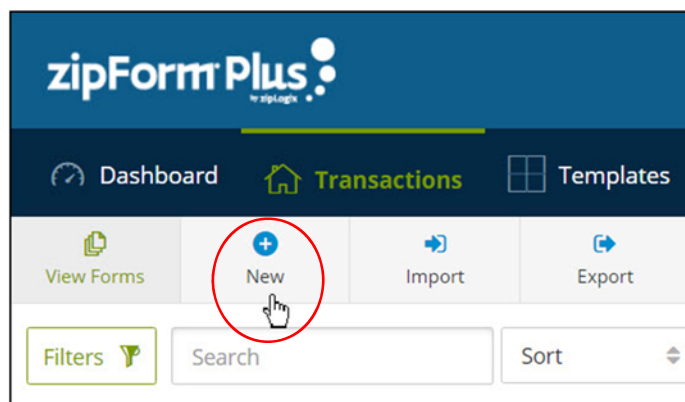
Log in to [zipformplus.com](https://www.zipformplus.com) or access the **Zipform** shortcut from the **OurOnePlace.com** home page.



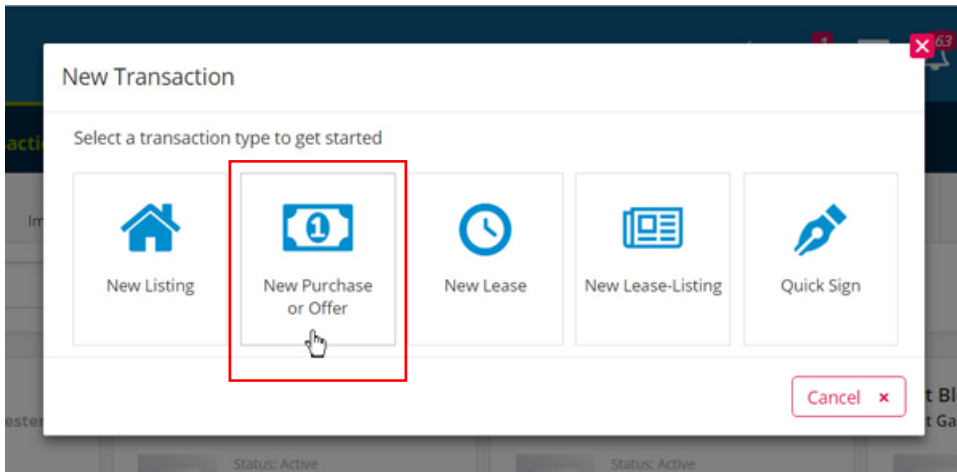
Choose **Transactions**.



Choose **New**.



Choose **New Purchase or Offer**.



Transaction Information

Enter a **Name** for your new transaction (Use your client's last name and then first name until you have a property address, then you can update the transaction name with the property address e.g. Smith John - 123 Main St)

Make sure that the **Select Your Location** drop down menu is set to your office.

Select a **Property Type**.

Set **Status** to **Active**.

Select your **Office** or **Personal Template** for **Purchase**.

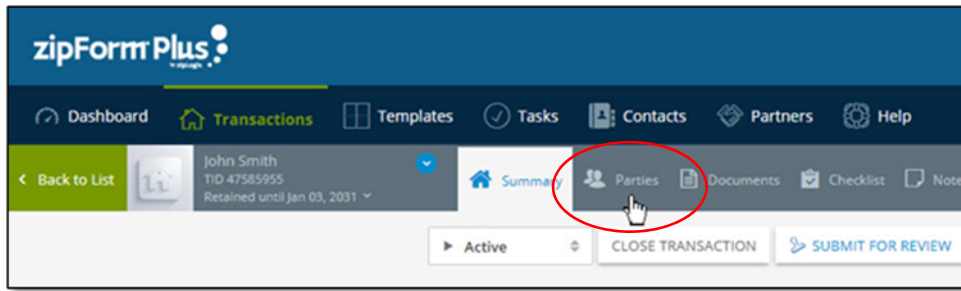
Choose **Save**.

A screenshot of a "Transaction Information" form. Fields include: "Name" (John Smith), "Select your location" (78 - REO - Milan, 1164 Dexter), "Import Property Information" (zipForm Record-Connect™), "Property Type" (Residential selected), "Status" (Active), "Select Template" (Personal - Scott Purchase Template), and "Comments" (Transaction Comments). A "Save" button is highlighted with a red box at the bottom.

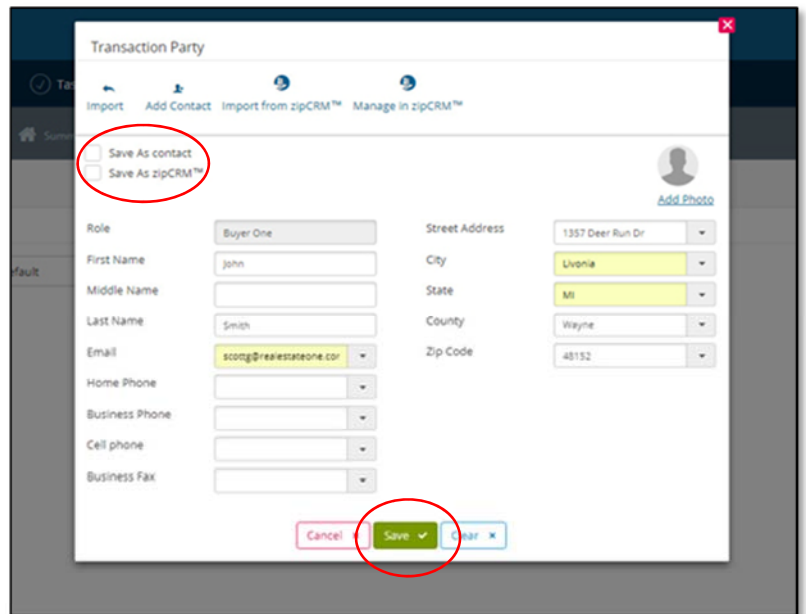
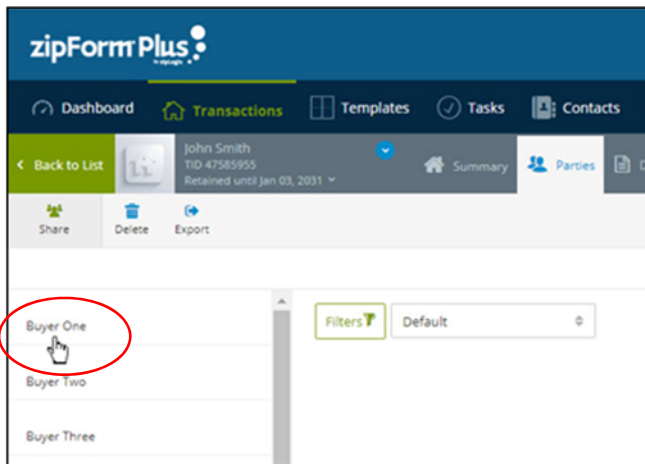
The transaction is now saved and available in your **Transactions list**.

*If you applied your office **Template** when you created this transaction all of your blank forms and folders were automatically added to your **Documents folder**. If you do not apply a template when creating a transaction, you will need to manually add the individual forms and folders to your **Documents folder**.*

Add the individual parties to your Transaction by selecting the **Parties** tab.



Select the role from the side bar menu and a blank contact record will display. Enter the contacts information and choose **Save**. You can also choose to save this entry permanently as a contact by selecting the **Save as Contact** check box before saving.



Selling Agent and Broker and **Listing Agent & Broker** can be saved permanently in each of your own personal Templates (Purchase and Listing) to avoid having to enter this information for each Transaction.

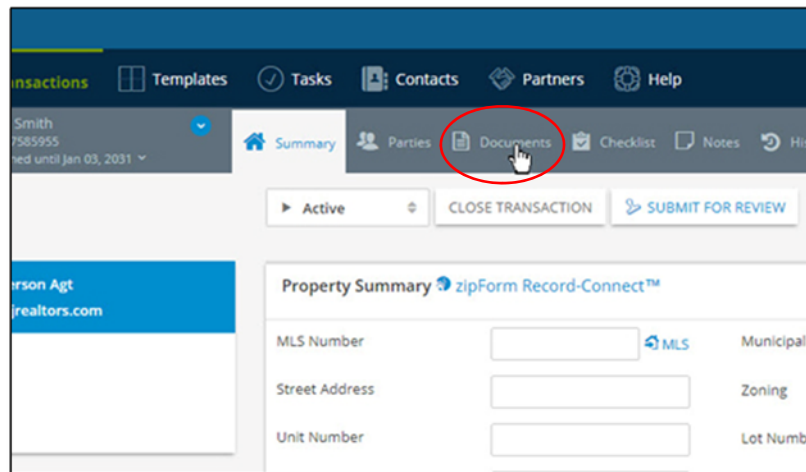
Present disclosures upon first contact to begin representation.

- Agency Disclosure
- Affiliated Business Arrangement Disclosure
- Wire Fraud Acknowledgement
- TRID Warning
- Designated Buyer Agency Agreement

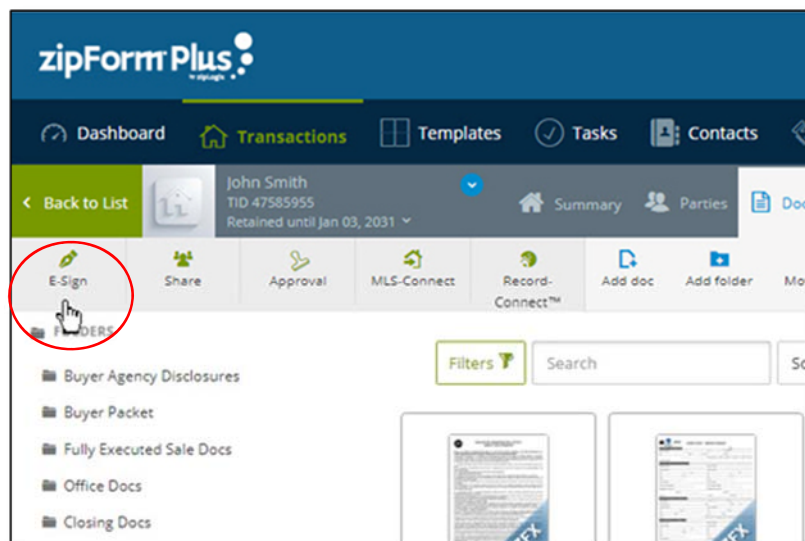
Acquire digital or ink signatures.

Digital Signatures

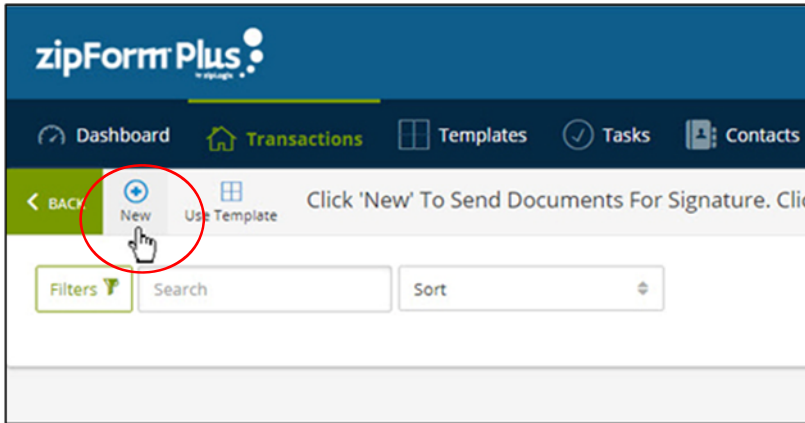
From within your transaction select **Documents**.



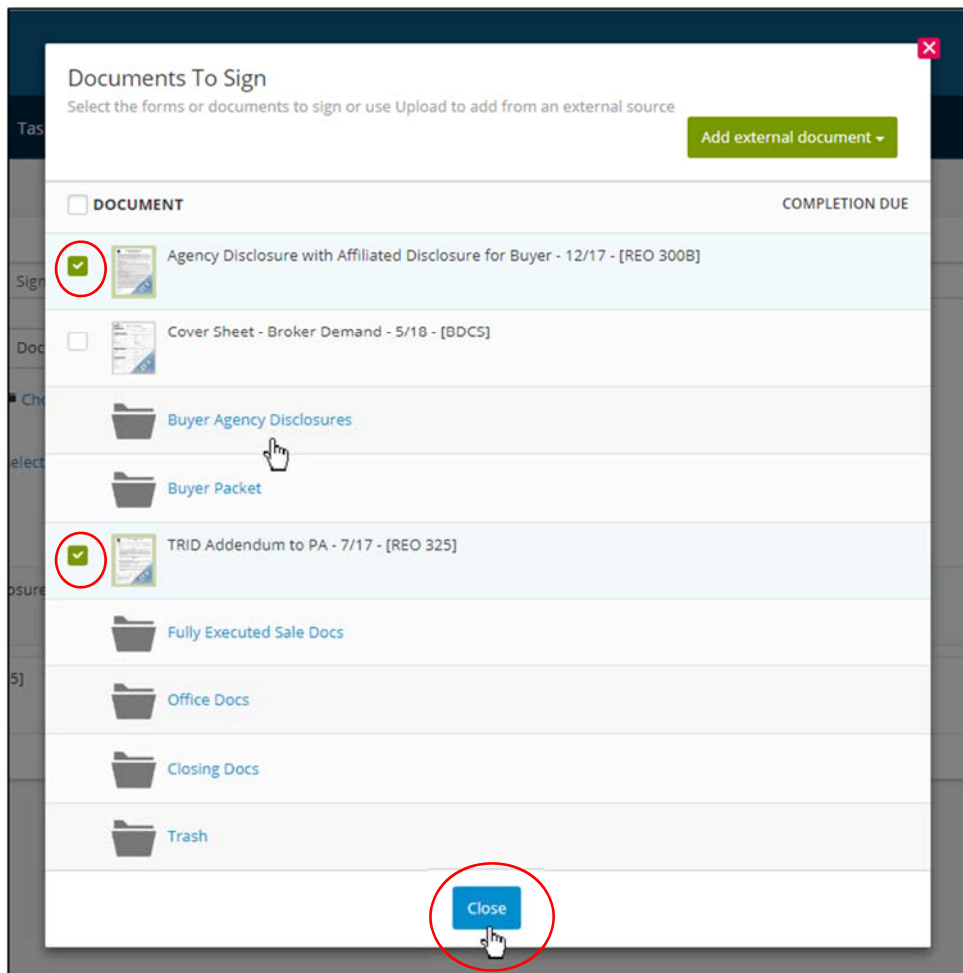
Then select **E-Sign**.



Choose **New**.



Select the documents that you'd like to send to be digitally signed. Then choose **Close**.



You can update the Packet Name if you would like. In the example below, **Disclosures** has been added to the name that comes up by default. Select the **Choose a return folder** link and select the folder that you would like your signed documents to be placed in when they return from being digitally signed. Then choose **Done**.

The screenshot shows the zipForm Plus interface. At the top, there is a navigation bar with 'Dashboard', 'Transactions', 'Templates', 'Tasks', 'Contacts', and 'Partners'. Below this, a 'BACK' button is visible. The main form area contains the following fields:

- Packet Name: Signature Packet 1 Disclosures
- Signing Service: DocuSign
- Return folder (optional): What is this? [Choose a return folder](#) (circled in red)

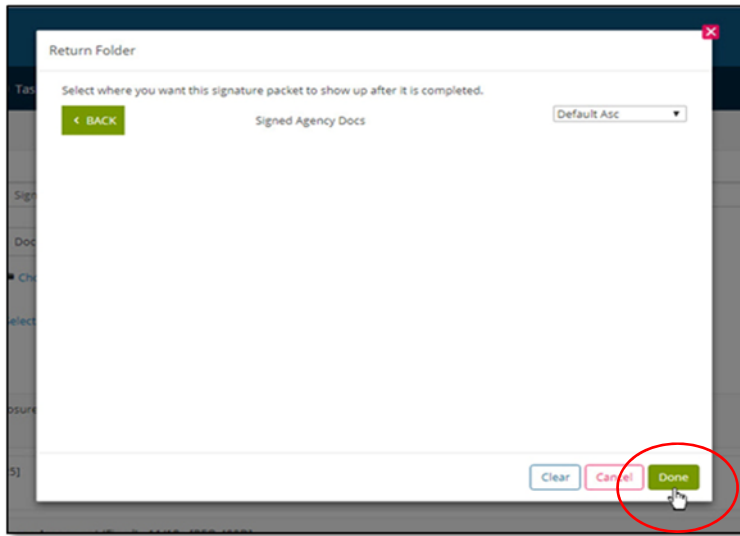
Below the 'Return folder' section, there is a 'DOCUMENT' section with a document icon and the text 'Agency Disclosure with Affiliated Disclosure for Buyer - 12/17 - [REO 300B]'. A 'Submit for review' button is also present.

The screenshot shows a 'Return Folder' dialog box. The title is 'Return Folder' and the subtitle is 'Select where you want this signature packet to show up after it is completed.' The 'Main Folder' is set to 'Default Asc'. Below this, there is a list of folders under the heading 'MAIN FOLDER':

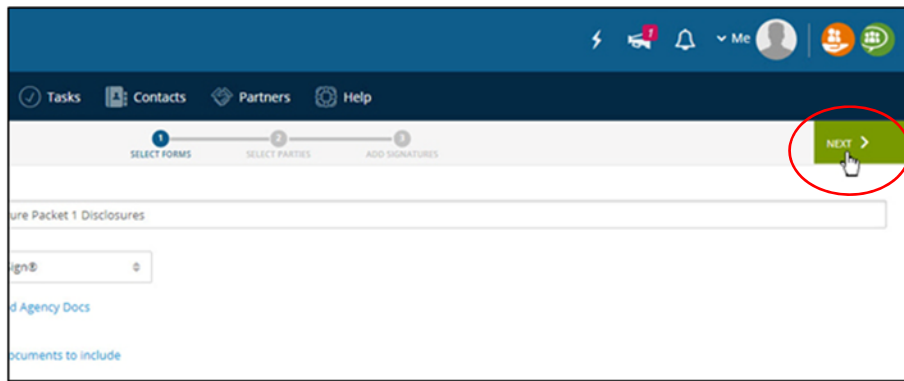
- Buyer Agency Disclosures
- Buyer Packet
- Fully Executed Sale Docs
- Office Docs
- Closing Docs
- Trash
- Signed Agency Docs (circled in red)

At the bottom right of the dialog, there are three buttons: 'Clear', 'Cancel', and 'Done' (circled in red).

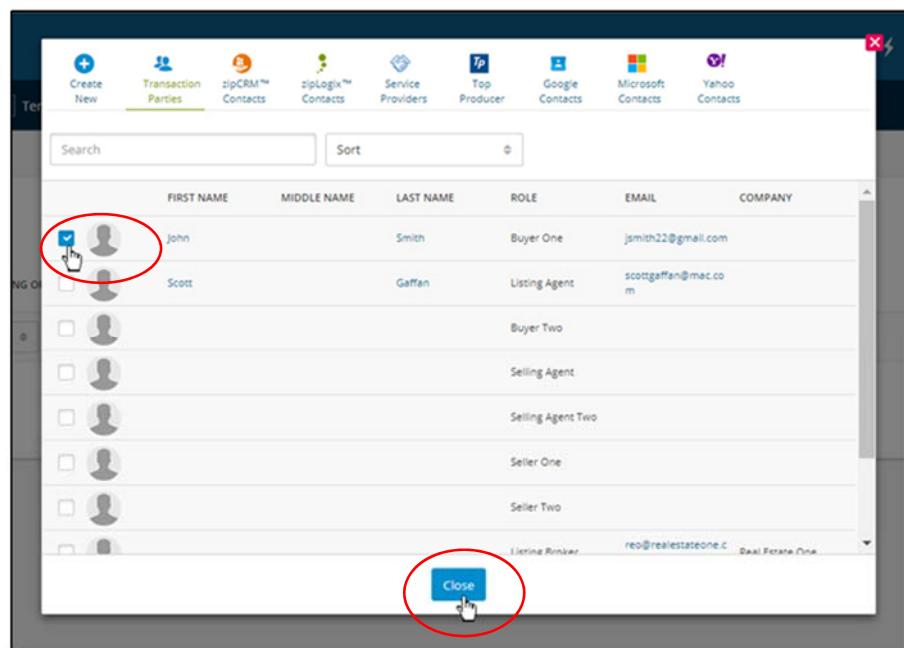
Then choose **Done** again.



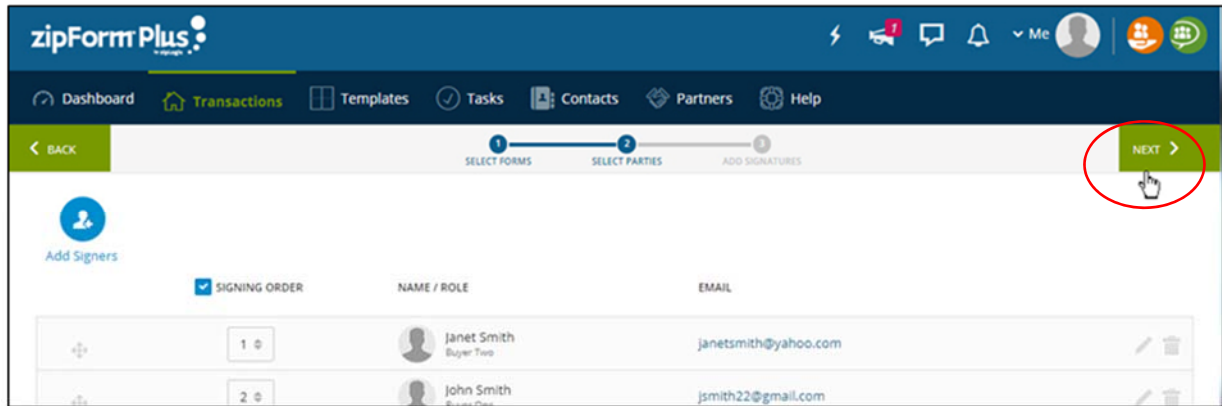
Choose **Next**.



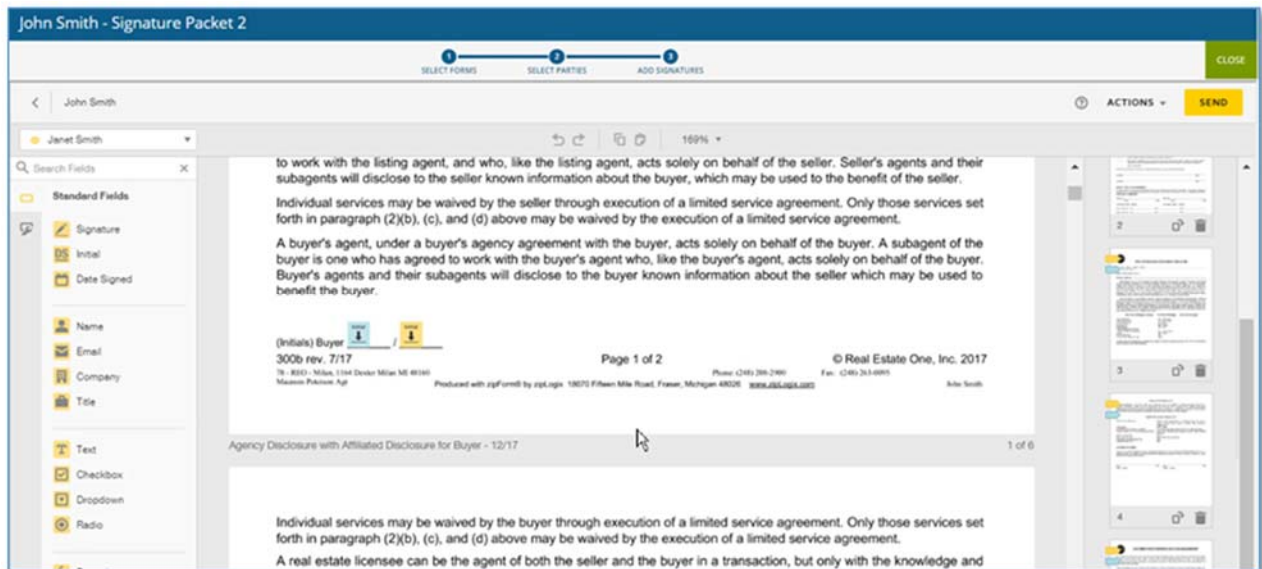
Select the signers and choose **Close**.



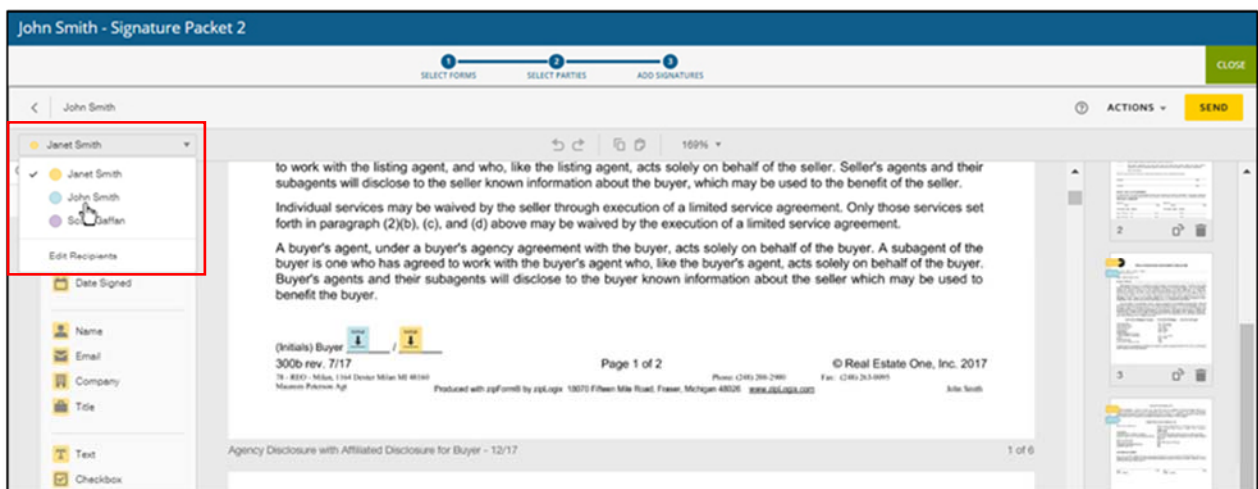
You can change the signing order and add additional signers by choosing **Add Signers**. When you have confirmed that all of your signers are included, choose **Next**.



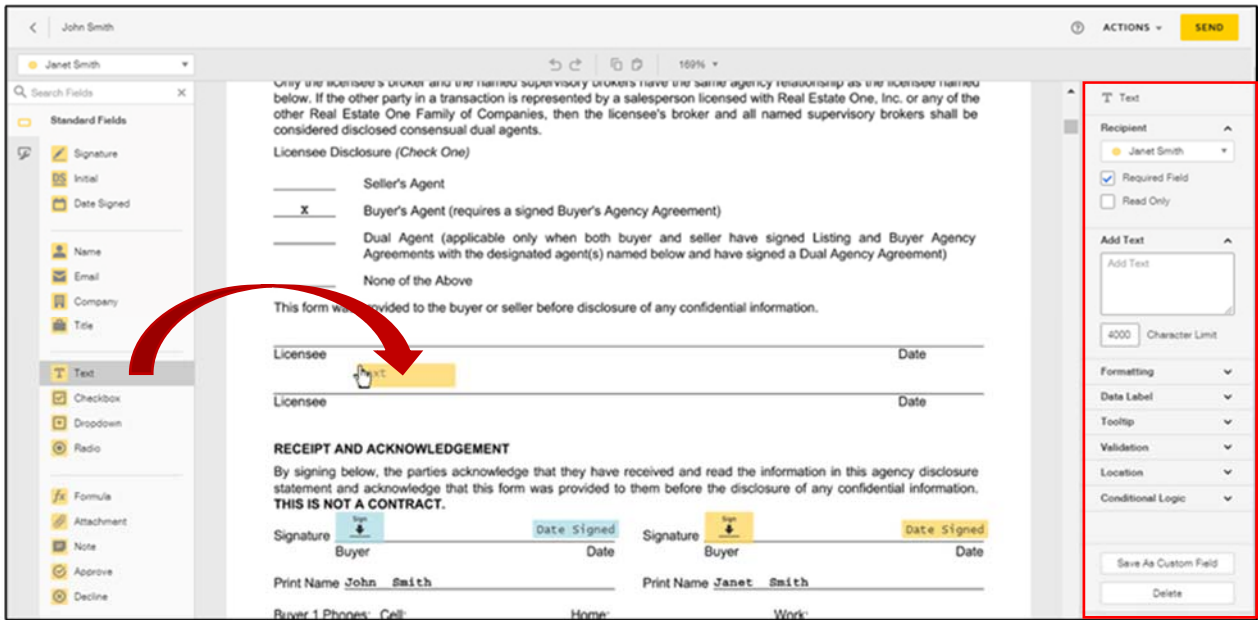
Your forms should load into DocuSign with all of the signature and initial fields already in place. Review all of them to make sure that all modifiers have been placed correctly.



You can add additional options using the modifiers found in the side bar menu on the left. When adding a modifier, make sure that you first select the correct color coded signer that you are adding the modifier for from the dropdown menu.



Then drag and drop the modifier into the correct location on the form. When you place a modifier on a form, the right sidebar displays the options available to customize the modifier.



If you'd like to include a message to the recipients that will be sent along with the forms to be signed, choose **Edit Message** from the **Actions** menu.



If you'd like to send a custom message to each recipient, check the check box. An individual message box for each recipient will display. Enter an **Email Subject** and add an **Email Message** for each recipient and choose **Done**.

Message to All Recipients

Custom email and language for each recipient

Email Subject *

John Smith

Characters remaining: 90

Email Message

Enter Message

Characters remaining: 10000

DONE

When you've finished reviewing all of the documents and you've added your custom messages, choose **Send**.

John Smith - Signature Packet 2

SELECT FORMS SELECT PARTIES ADD SIGNATURES

CLOSE

John Smith

ACTIONS

SEND

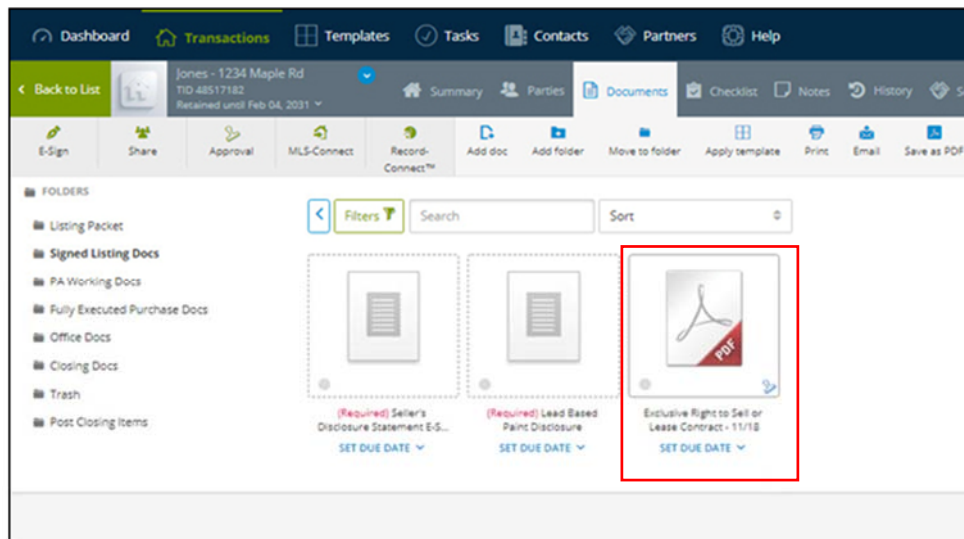
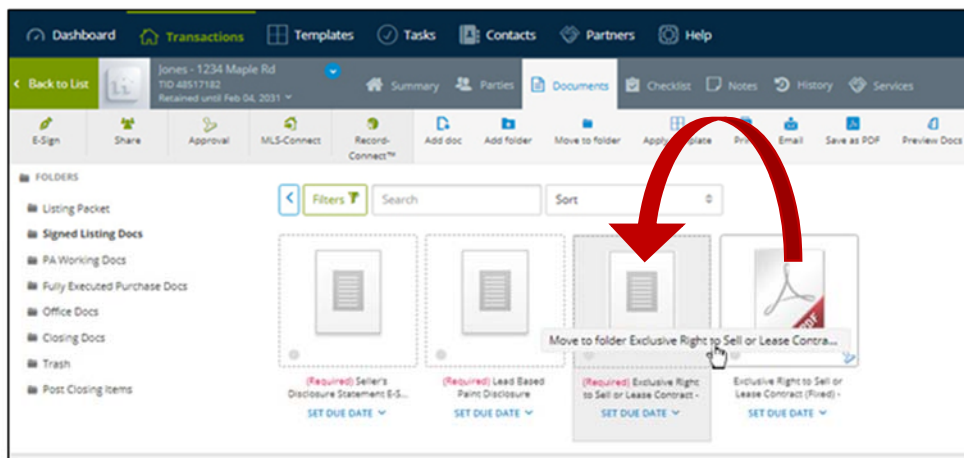
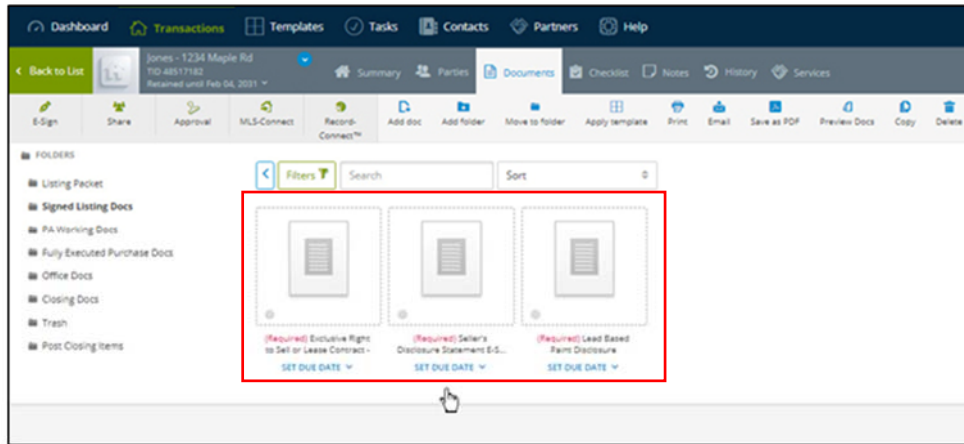
DISCLOSURE REGARDING REAL ESTATE AGENCY RELATIONSHIPS

You will receive an email message letting you know when each of your signers have completed the DocuSign signing process and a copy of all of the signed completed forms will automatically be placed into your zipTMS transaction, directly into the folder that you selected as your return folder.

Placeholders

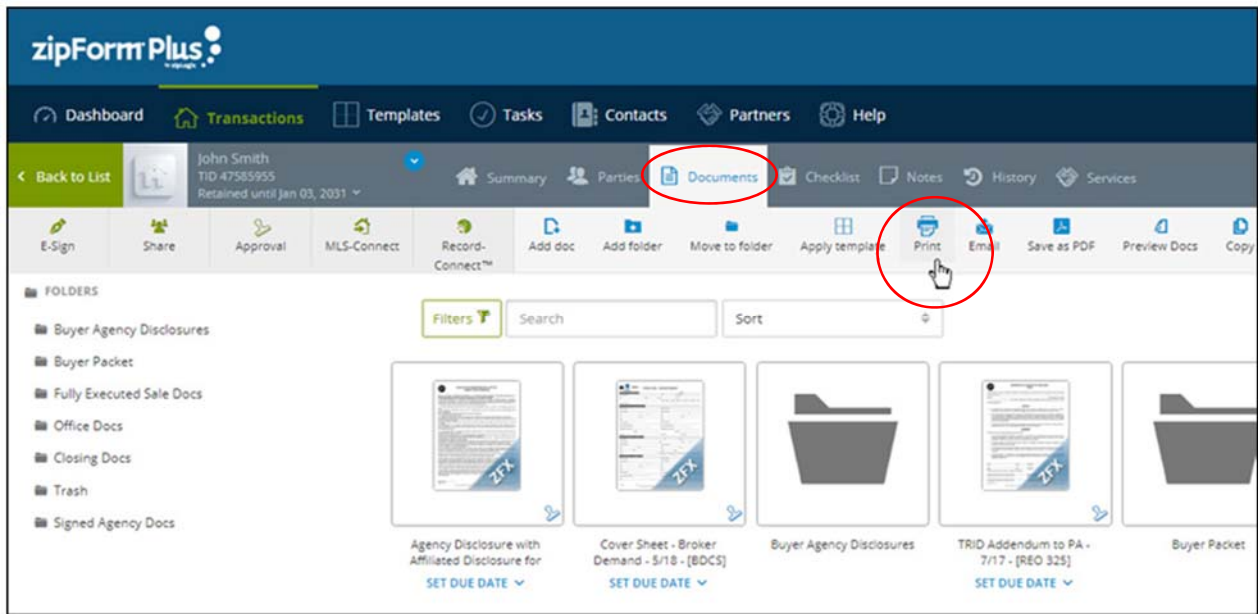
Document placeholders were added to your **Signed Agency Docs** folder with the rest of the forms and folders that loaded up with your office template. **Digitally signed** documents with a set return folder are automatically placed into the correct placeholder within that folder. **Manually** uploaded forms have to be moved into the correct placeholders manually.

Once your manually uploaded signed, split and correctly named forms have been moved into your **Signed Listing Docs** folder, you will also need to drag and drop them onto their corresponding placeholder to successfully place your documents and to satisfy the required placeholder.

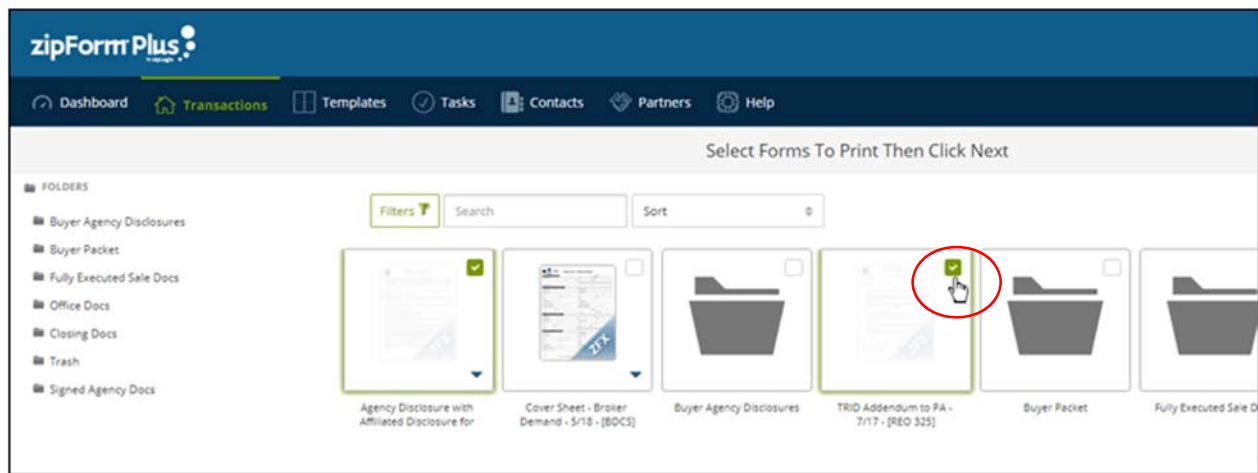


Obtain Ink Signatures

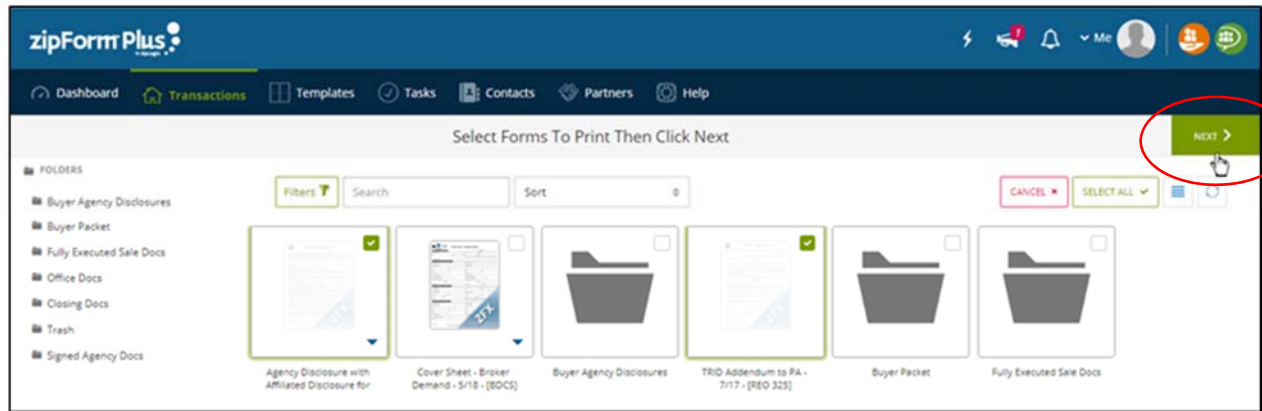
From the **Documents** folder of your transaction, choose **Print**.



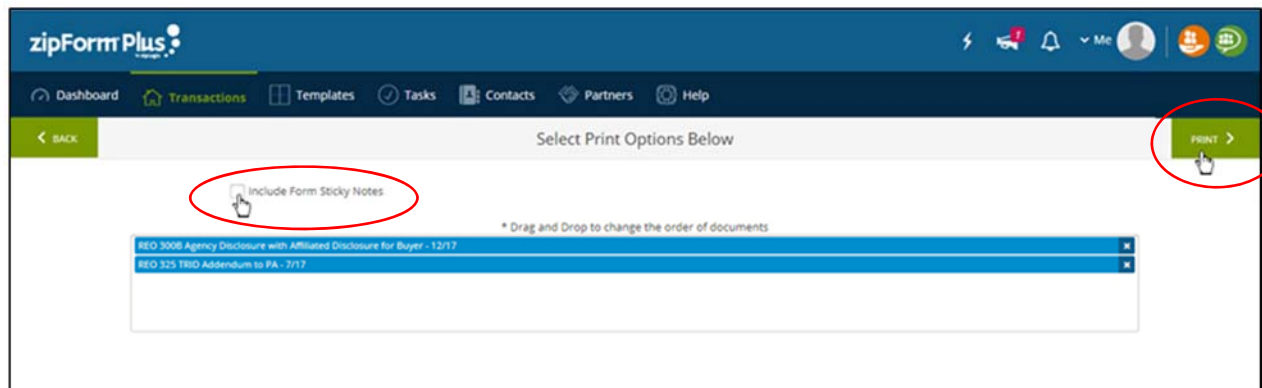
Select each of the documents that you would like to print.



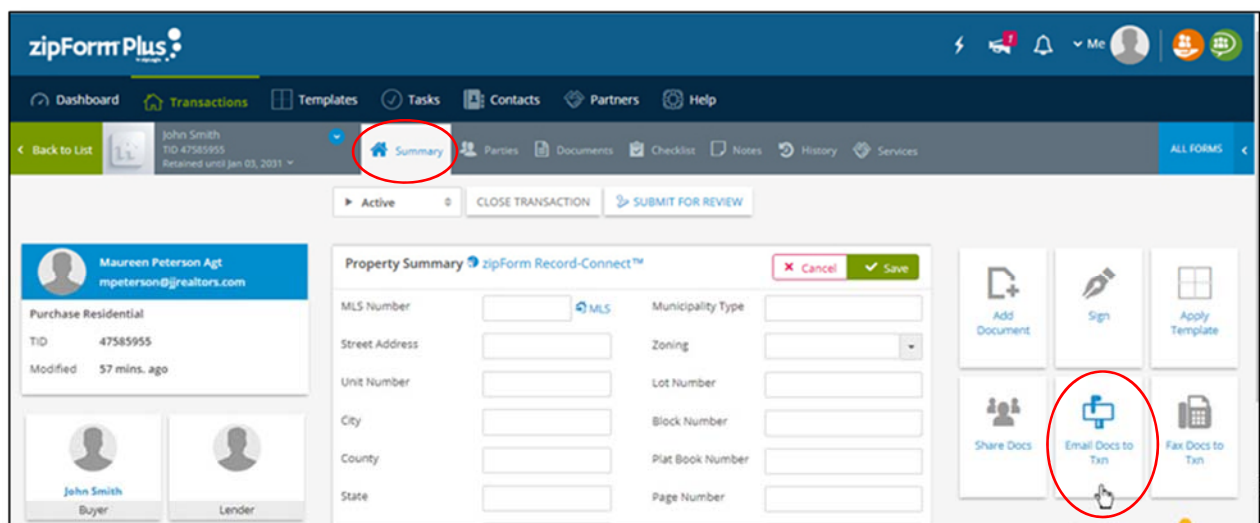
Choose **Next**.



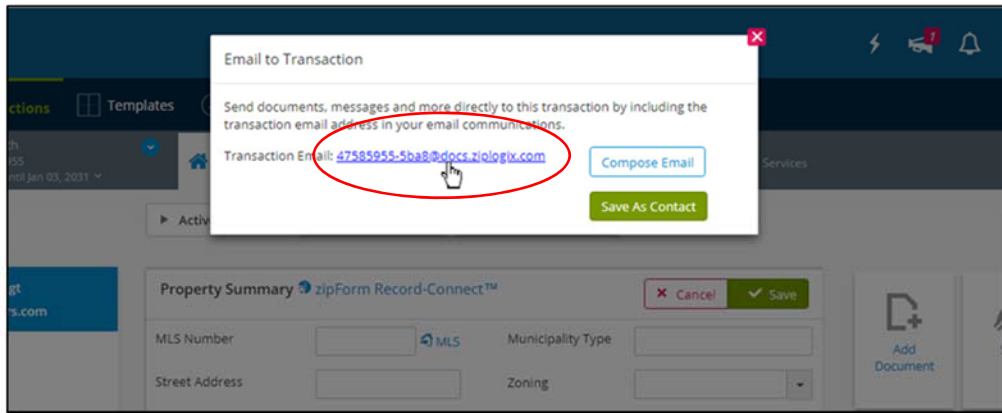
Choose **Print**. If you'd like to include **Form Sticky Notes** on your printed forms, check the check box before choosing **Print**.



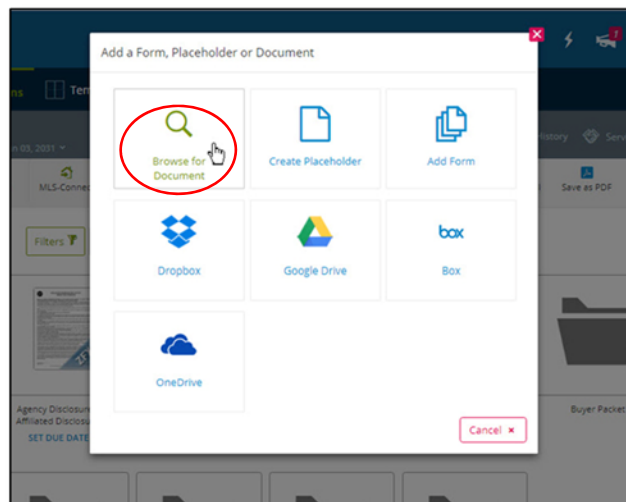
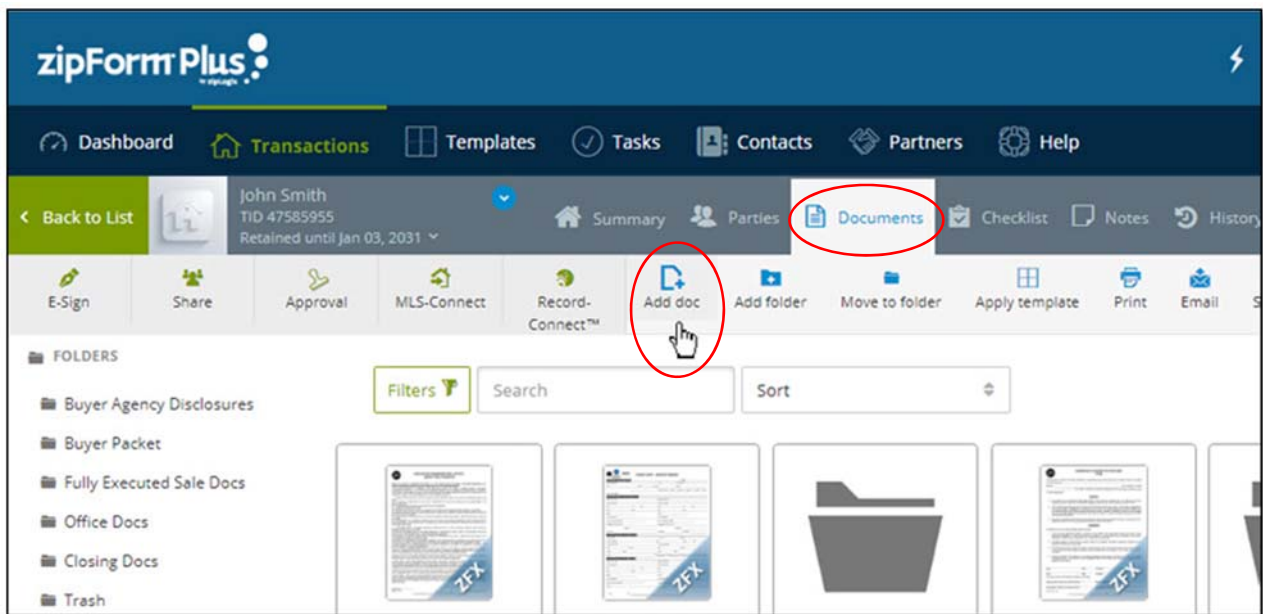
Once you have ink signatures on all of your printed documents, scan all of the signed documents to your email address or scan them and send them directly to your transaction using the **Transaction Email Address**. To access the **Transaction Email address**, select **Email Docs to Txn** from the **Summary** page of the transaction.



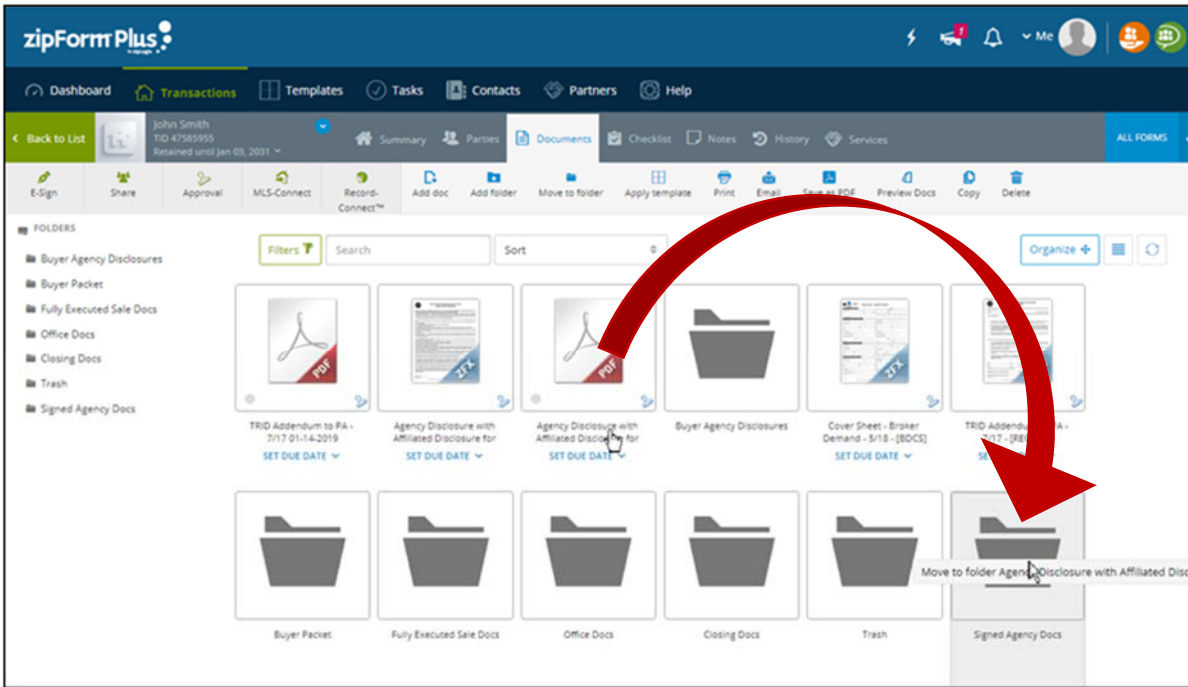
You can scan your signed documents and send them directly to the **Transaction Email Address** or scan them to your email address and then forward your email on to the **Transaction Email Address**.



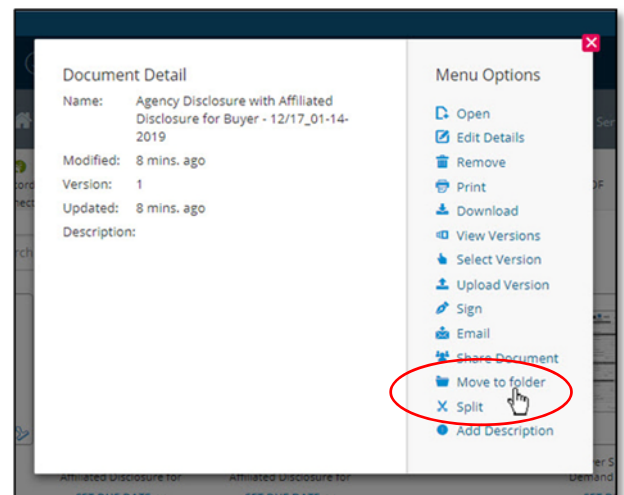
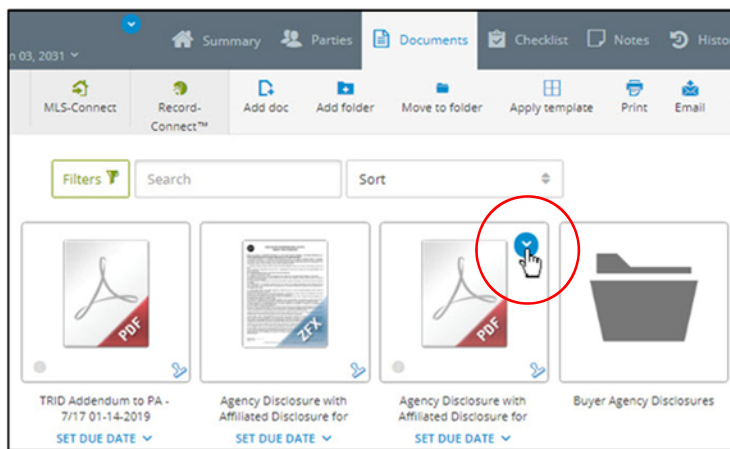
You can also choose **Add doc** from your transaction's **Documents** folder and upload your signed documents from your computer or from a cloud storage folder.



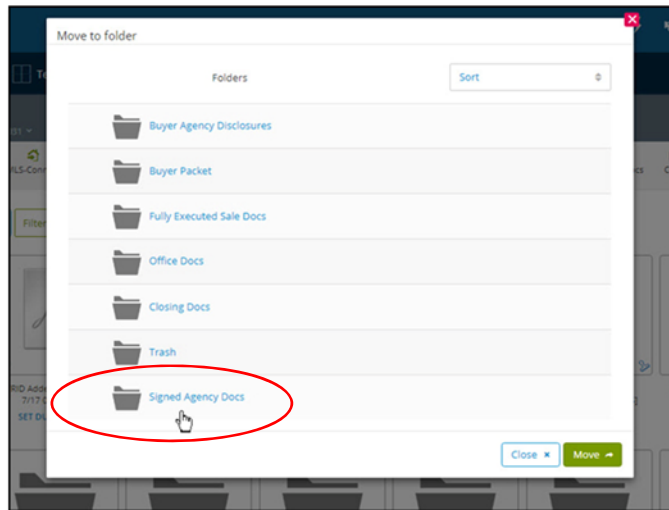
Once you have all of your signed and scanned documents loaded up to your transaction's **Documents** folder, you can move them to your **Signed Agency Docs** folder. You can drag and drop the documents onto the **Signed Agency Docs** folder. Manually uploaded forms need to also be dragged and dropped onto their corresponding place holders within the Signed Agency Docs folder. See the **Placeholders** section above.



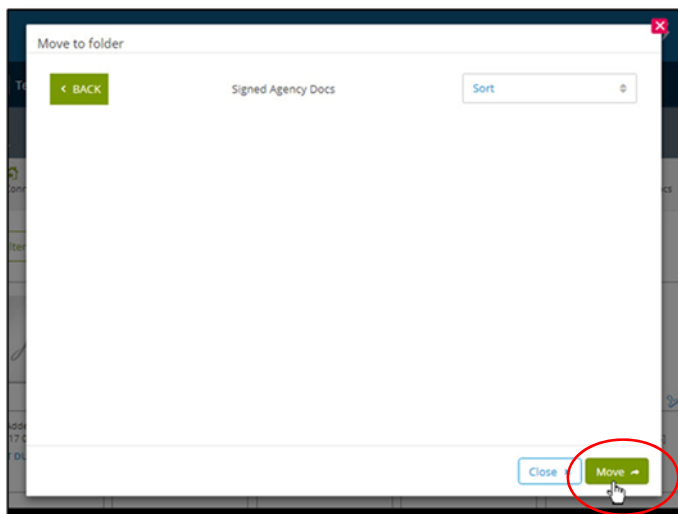
You can also move documents by selecting the **More Actions** link on each document and choosing **Move to Folder** from the **Menu Options**.



Select the folder that you'd like to move the document to.

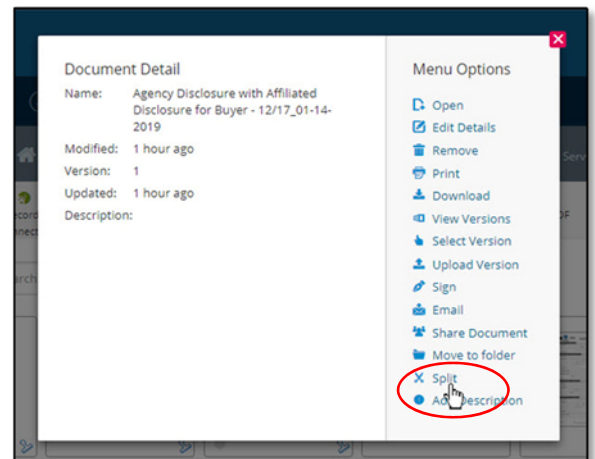
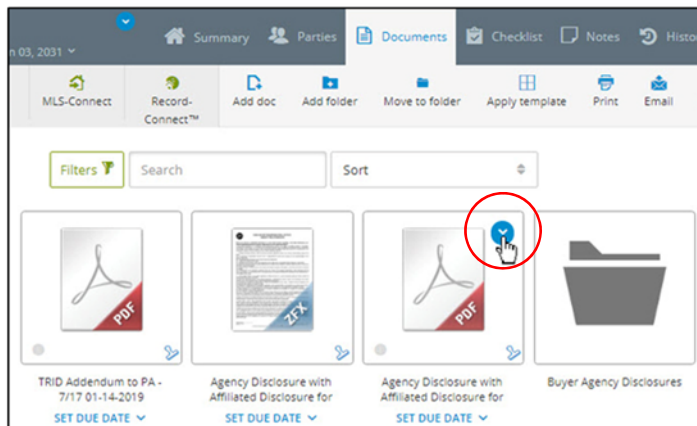


Then choose **Move**.

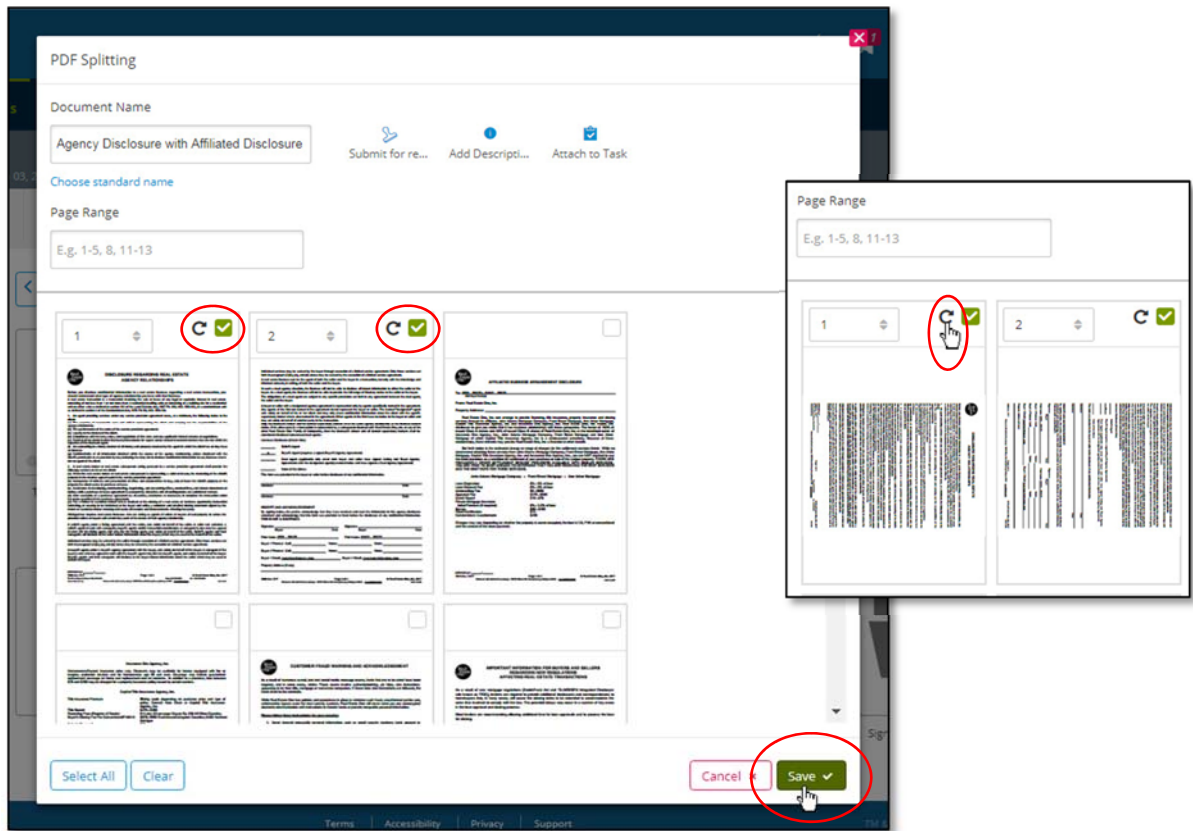


Splitting a multi-page PDF

If you scanned all of your documents into one single PDF file, you can split it back into individual PDF files by selecting the **More Actions** link on the document and choosing **Split** from the **Menu Options**.



Select the pages that you'd like to split into a new PDF. You can also rotate pages by selecting the rotate icon on each page. Select the **Choose Standard Name** drop down menu to be sure that you are naming your split forms correctly or they will not match up with the document placeholders. Choose **Save**.

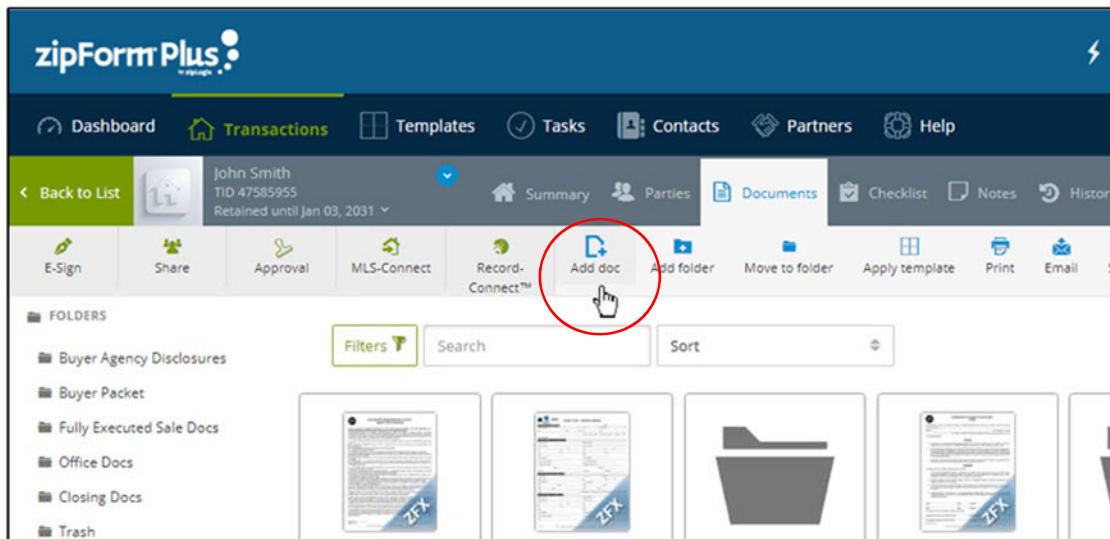


Advise Client to obtain mortgage pre-approval.

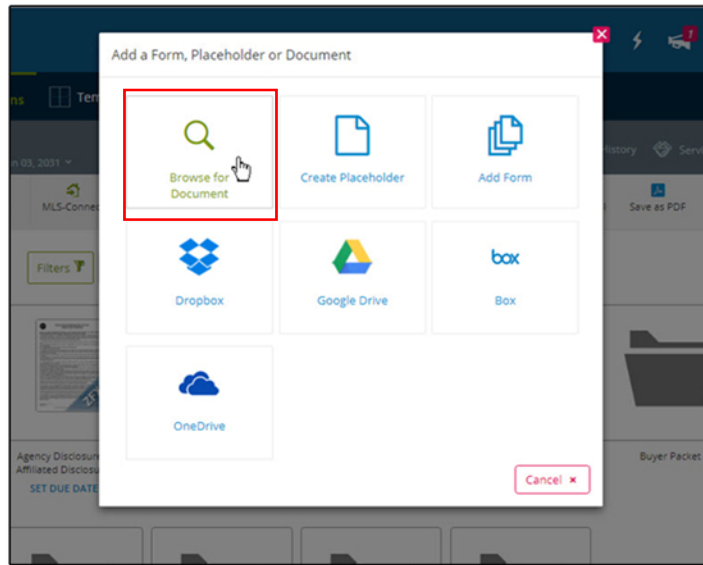
Add Pre- approval letter to the transaction.

You can add the pre-approval letter to your transaction by scanning it and emailing it directly to the transaction or by uploading it to the transaction's documents folder.

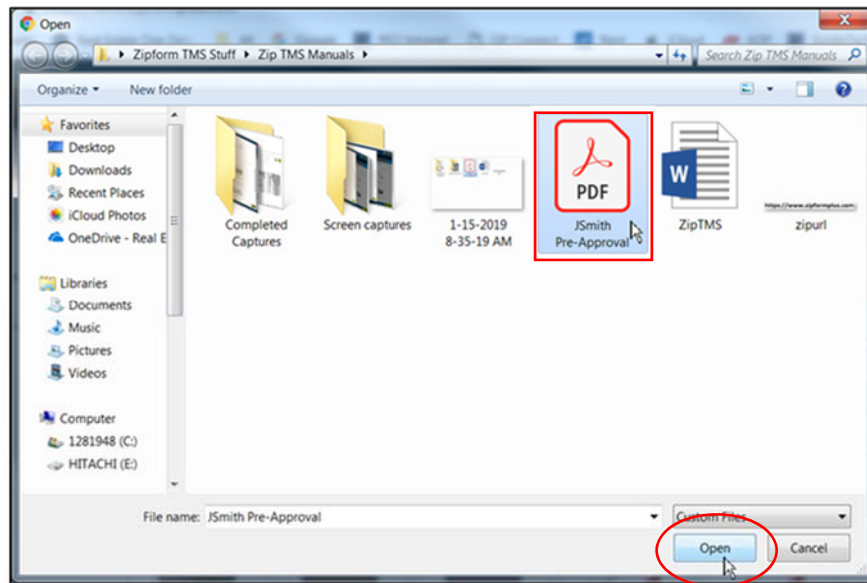
To upload it to the documents folder, choose **Add doc**.



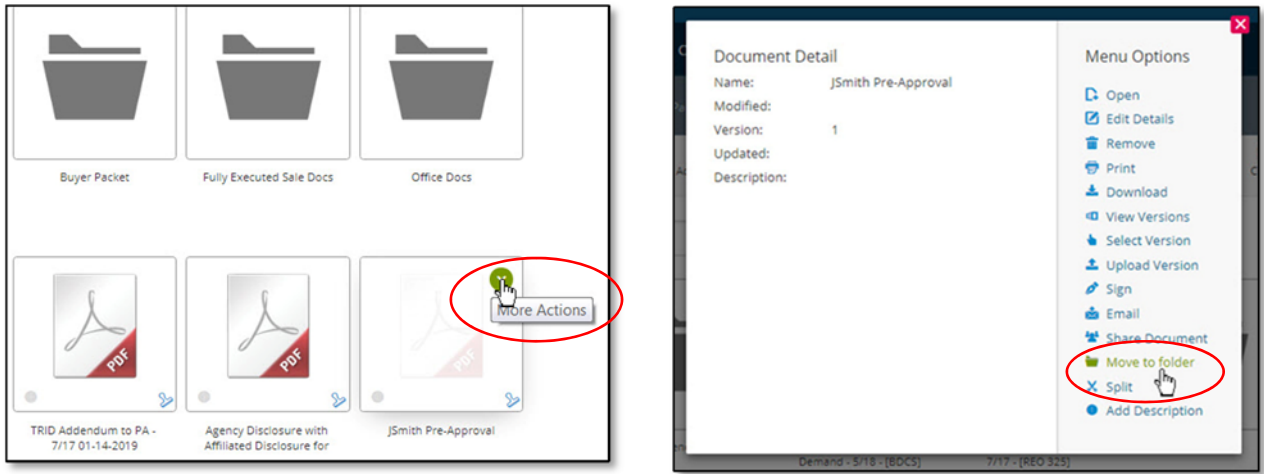
Choose **Browse for Document** or choose a cloud source.



Select the file and then choose **Open**.

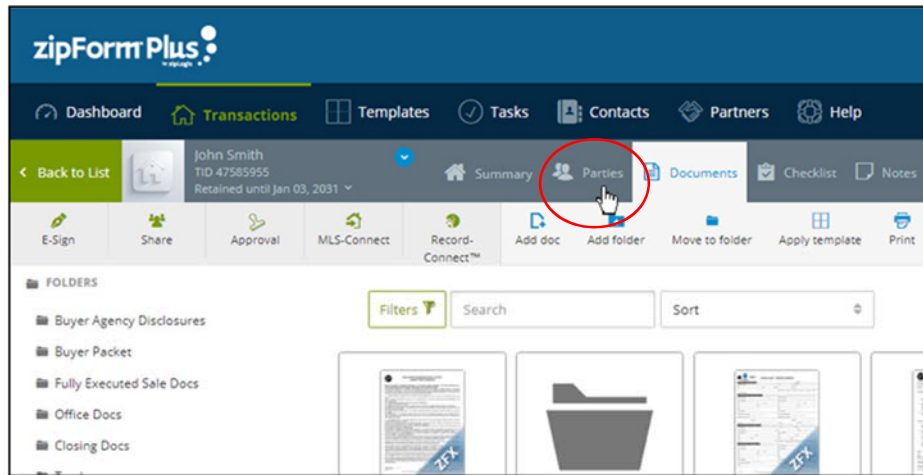


Once the pre-approval letter is loaded up to the documents folder, you can move it to a specific folder by dragging and dropping it or by choosing the **Move to folder** option from the **More Actions Menu Options**.

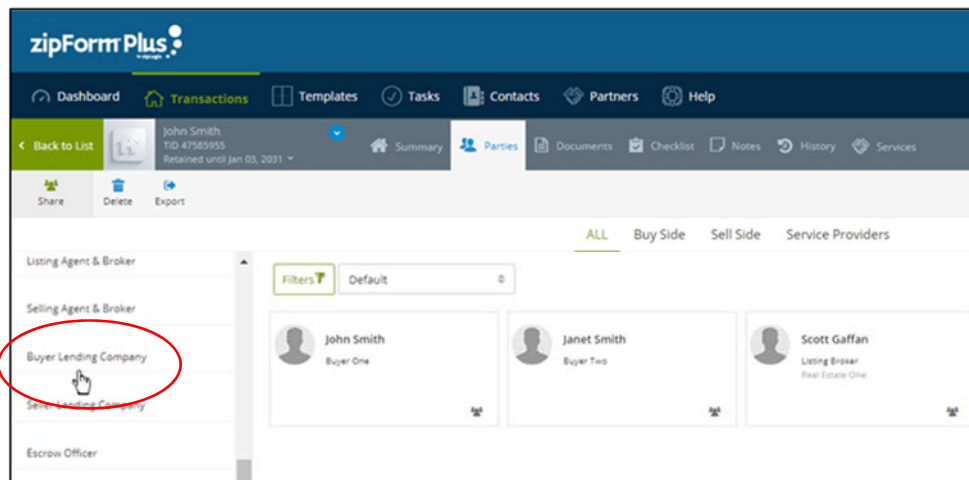


Add Buyer Lender information to the transaction Parties.

Select **Parties**.



Choose **Buyer Lending Company**.



Enter the Lender information and choose **Save**. You can also choose to save this entry permanently as a contact in ZipTMS by selecting the **Save as Contact** check box before saving.

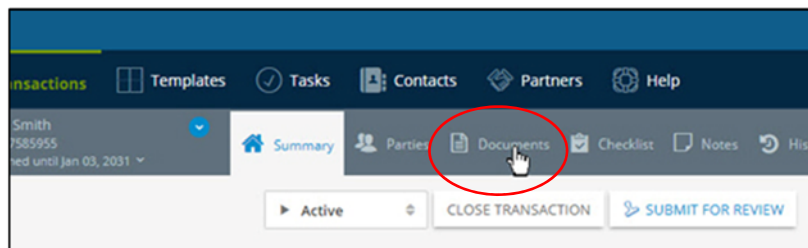
The screenshot shows the 'Transaction Party' form in ZipTMS. At the top, there are navigation options: 'Import', 'Add Contact', 'Import from zipCRM™', and 'Manage in zipCRM™'. Below these, there are two options: 'Save As contact' and 'Save As zipCRM™', both of which are circled in red. The form fields include: Role (Buyer Lending Company), Officer Name (Bob Mortgageguy), Email (bmortgageguy@gmail.com), Company Name (JAMCO), Cell phone, Phone, Business Fax, Street Address, City, State, and Zip Code. There are also checkboxes for Mortgage Type: Conv., FHA, FMHA, VA, and Other. At the bottom, there are three buttons: 'Cancel', 'Save', and 'Clear'. The 'Save' button is circled in red.

Show properties.

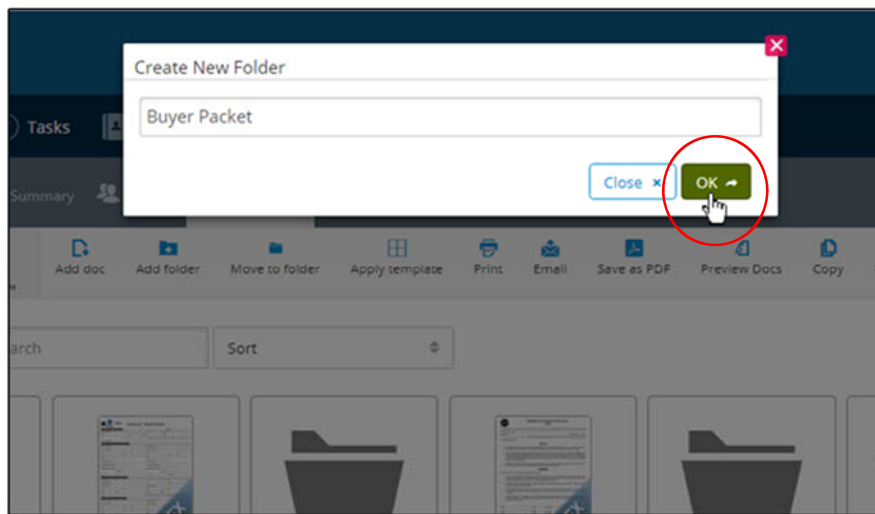
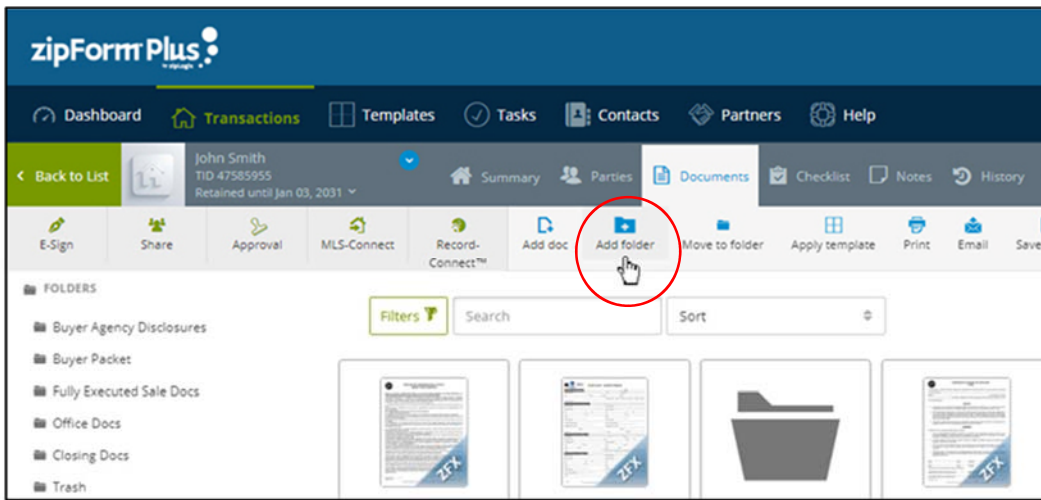
Buyer selects a home.

Prepare Buyer forms package.

Select **Documents** to open your **Documents** folder.

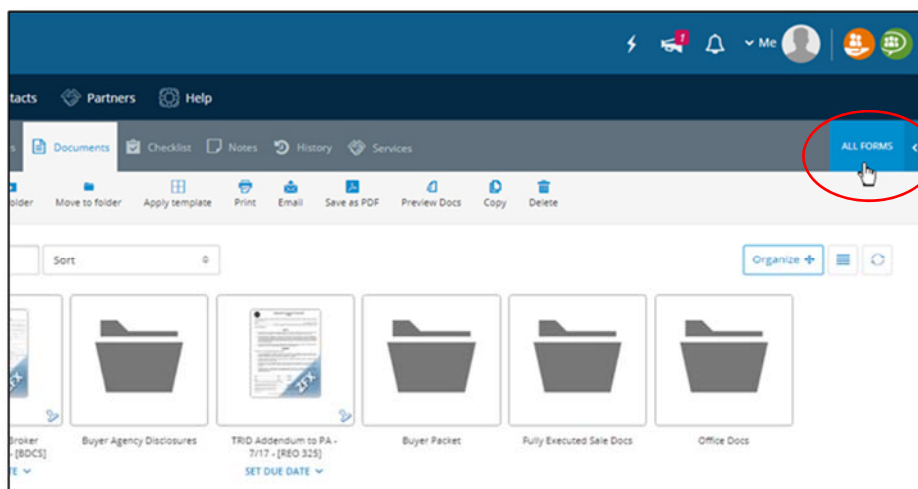


If you used a template when you created your transaction, your purchase forms should all be in your **Buyer Packet folder**. If you created your transaction manually, create a new folder by choosing **Add Folder** and name it **Buyer Packet** and drag and drop all of your sales forms into the folder.



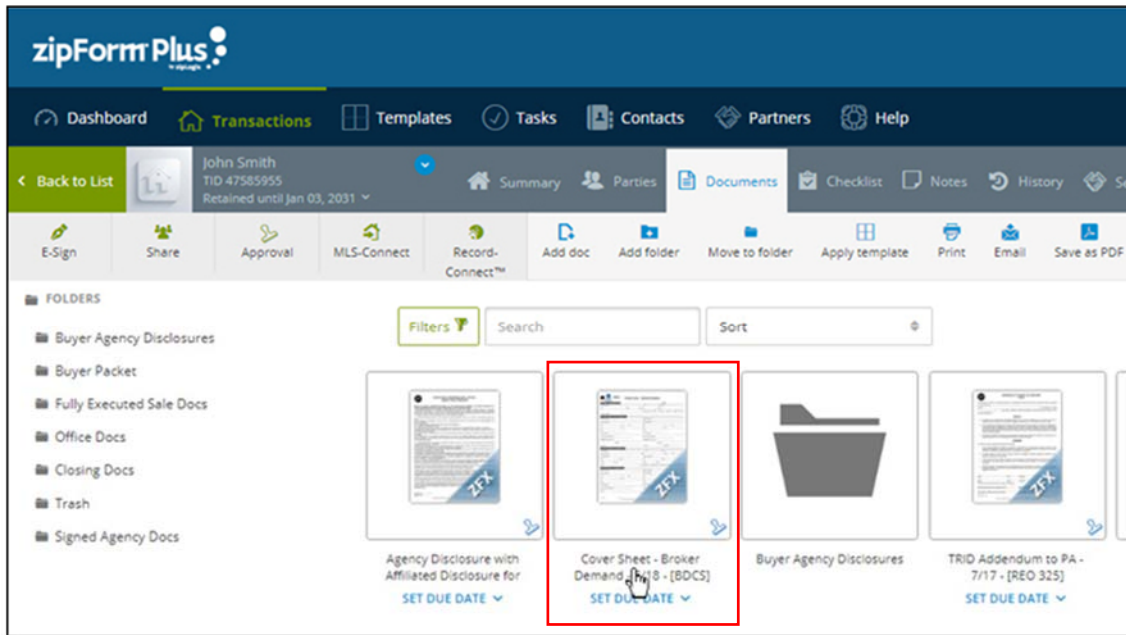
If you did not automatically load all of your forms to the transaction using a template when you created the transaction, you can manually add them at any time.

To manually add forms to your transaction, go to your **Documents folder** and choose **All Forms**.



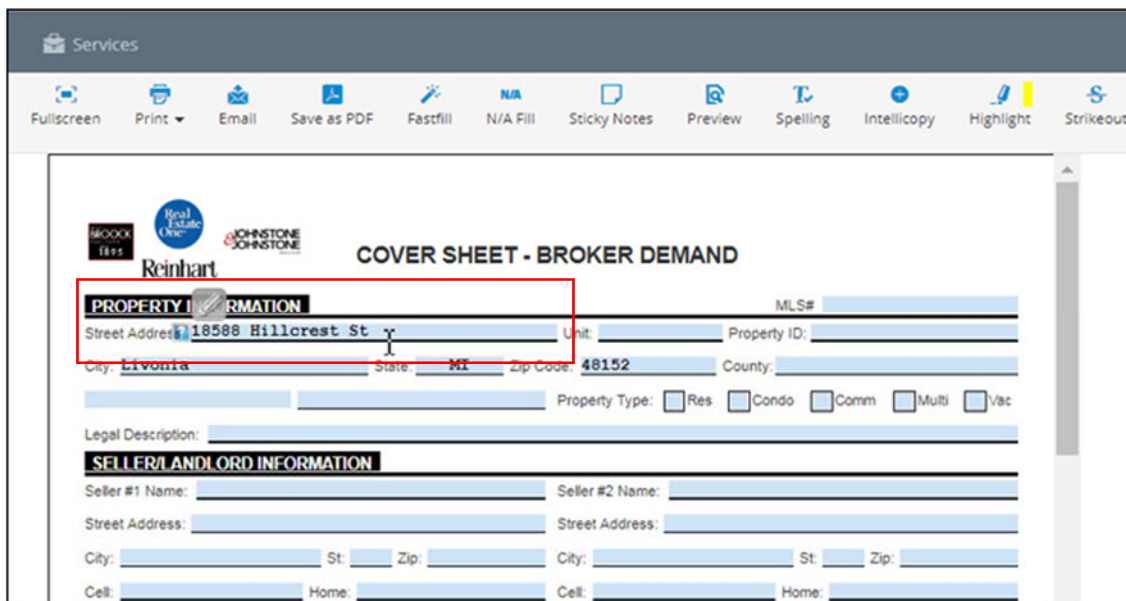
Once you have all of the forms that you need in your **Documents folder**, you are ready to enter the sale information. All of the forms in a transaction auto populate the information that you enter into like fields. So if you fill out the property address on the **Purchase Agreement**, the property address will be automatically filled in on all of the other forms within that transaction. The same holds true for the **Summary** section of your transaction and the **Cover Sheet Broker Demand** form. If you fill in the basic transaction information on the **Cover Sheet**, it will auto fill all of the other forms in your transaction and it also serves as a transaction reference sheet for you and can be sent to Capital Title because it contains all of the information that they need also. The **Cover Sheet** is similar to the information that was found on the cover of our old deal folders.

Open the **Cover Sheet Broker Demand** form and fill in the details of the sale.



Enter all of your Sale information into the form.

Select a form field with your mouse to enter information into the field. You can also use the **Tab key** on your keyboard to tab through the form fields.



There's a row of icons that displays across the top of all open forms providing you easy access to commonly used tools. There's a brief description of what each icon does below.



e-Sign – allows you to send the currently open form out through DocuSign for digital signatures.

MLS-Connect – allows you to import basic information from the listing in your MLS to auto populate the forms in your transaction. Using this function requires you to log into your MLS.

Record-Connect – is similar to MLS connect but it access a national public records data base for listing information. It is available as an extra for an additional fee and is usually only used when MLS connect is not available with your MLS.

Save – selecting this option instantly saves all changes. By default the zipForm system auto-saves every 15 minutes. This default can be changed in Profile & Settings under the Settings tab.

Fullscreen – selecting this function enlarges your form to fit the entire window. The icon switches to Normal and selecting it will return your form to the normal sized view.

Print – the **Print** drop down menu provides you with the ability to **Print the currently open form, Print multiple forms, Print a Blank form** and **Print a Sample form**.

Email – selecting this option allows you to email or fax the currently open form.

Save as PDF – allows you to save the currently open form as a PDF within the transaction or to your device.

Fastfill – selecting this option temporarily removes all of the text / clauses from a form and only displays the form fields making it easier for you to fill in all of the form fields without the distraction of the rest of the form. The Fastfill icon changes to a viewer icon. Select the viewer icon to return the form to its normal view.

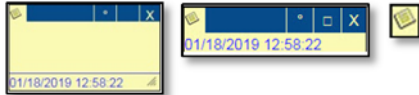


N/A Fill – allows you to fill in all empty fields of a form with any text that you enter, by default it is set to N/A. So you could have N/A entered into all of the empty fields on a form. You can also use this same tool to remove text from a form. You enter the text that you would like removed from a form and it will automatically find and remove the text that you enter from anywhere that it occurs on that form.

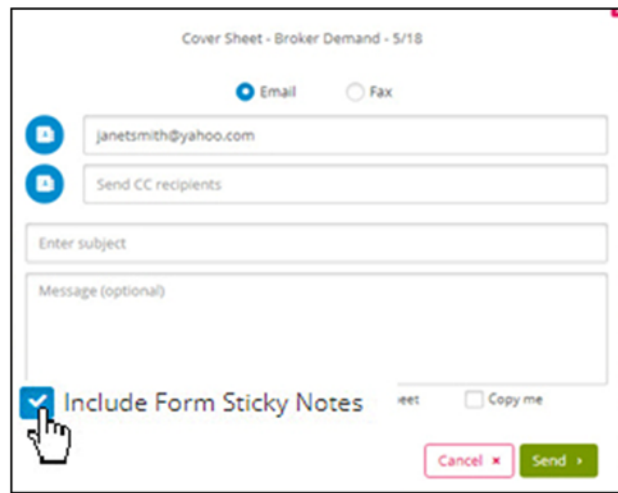
Continued on next page...



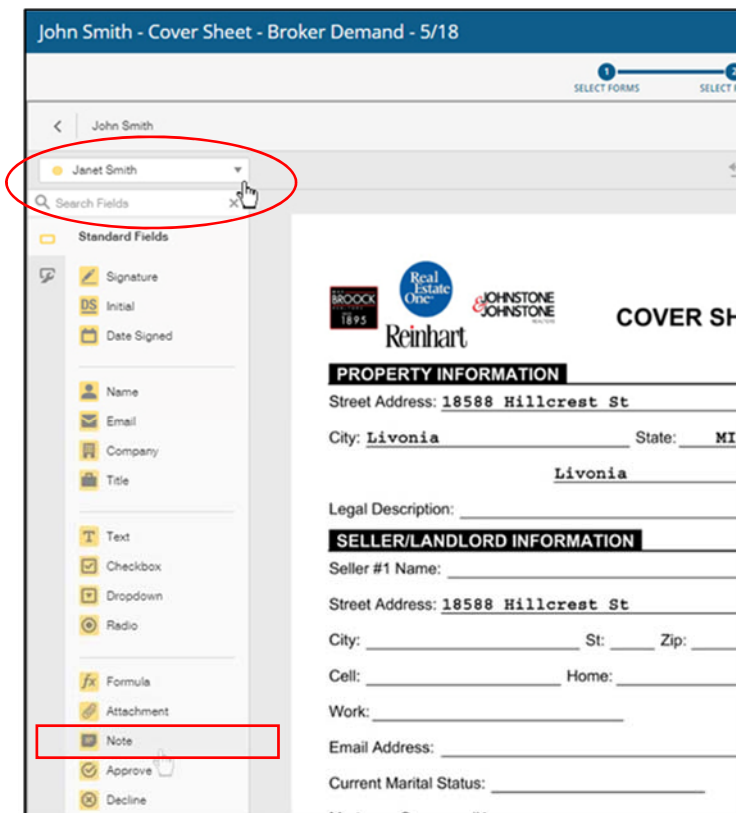
Sticky Notes – you can add a sticky note anywhere on a form. Select the Sticky Notes icon and a small sidebar menu will display. **Select New Note** to add a new note. The note can appear as a full note, a minimized bar or just a small square icon by selecting each of the three blue squares in the top right corner of the note.



You can also choose to have a sticky note included in a form that is emailed to a client from zipTMS.



Sticky notes added in zipTMS are not included on forms that are sent to be digitally signed through DocuSign but you can add notes directly to a form in **DocuSign** instead and they will be included on the forms in a **DocuSign signing package**.



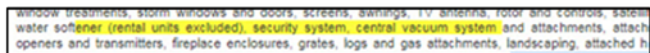


Preview – gives you a preview of how the completed form will look with all of the information that you have entered into the form fields. You can also Email, Print, Download or Submit the form for review from the preview.

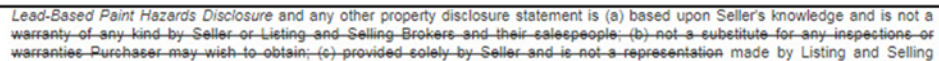
Spelling – selecting this icon initiates a spell check on all of the information that you have entered into the form fields of the form. It does not spell check the permanent text on a form. If you discover a spelling or grammatical error in any of the permanent text on any of our forms, please notify the Real Estate One I.T. Department.

Intellicopy -

Highlight – you can highlight sections of text on a form. Click and hold your left mouse button down and drag your cursor across the text that you’d like to highlight, then select the highlight icon. To remove the highlight, double click on the highlighted text.



Strikeout – you are not able to delete or edit the permanent text on a form but you can strikeout sections of it. The Strikeout option works similar to Highlight. First drag and select the section of text that you would like to strikeout and then select the **Strikeout** icon. To remove the strikeout, double click the text that has been stricken out.



Undo – reverses the last change that you made.

Redo – re-applies the last change that was undone.

Photos – allows you to attach or detach a photo

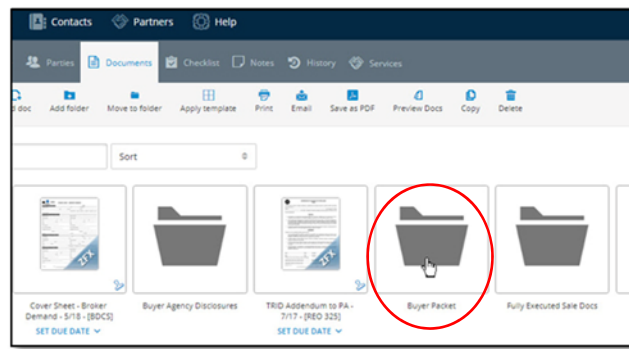
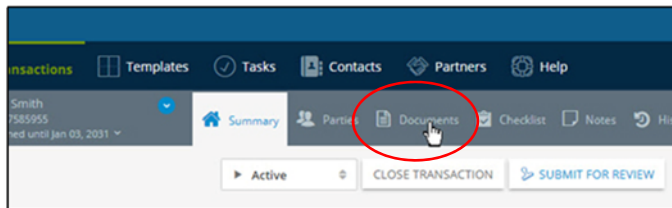
Lookup Field Manager – zipTMS saves past information that you have entered into form fields and makes it available to you in the form field drop down menus so you can easily choose information that you have entered before instead of entering it manually again. This helps when filling in information that is common across many transactions like broker information. These fields can get quite full after a while. You can use the Lookup Field Manager to clear these dropdown menus out when they get too full.

Clause Manager – the Clause Manager allows you to access a library of basic clauses to be used in creating addendums. There is a library of clauses available to everyone and you are also able to save your own clauses.

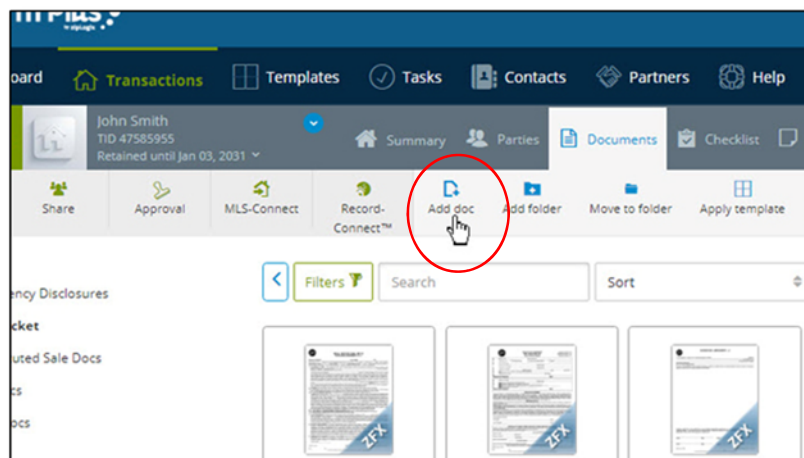
Once the cover sheet is filled in go back to your documents and open your **Buyer Packet**. Check to make sure that all of the information has been entered into of the correct locations on all of the forms. Fill in the remaining form fields that are form specific and were not auto filled with the information that you entered on the **Cover Sheet Broker Demand form**.

Add the disclosures from the listing side.

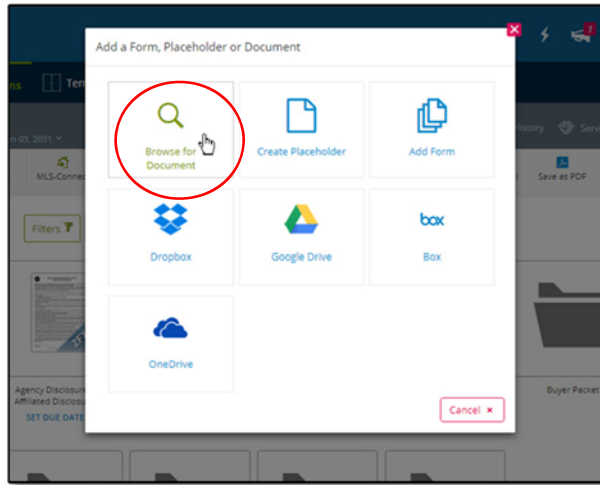
To add the disclosures, go to your **Documents Folder**. Then open your **Buyer Packet**.



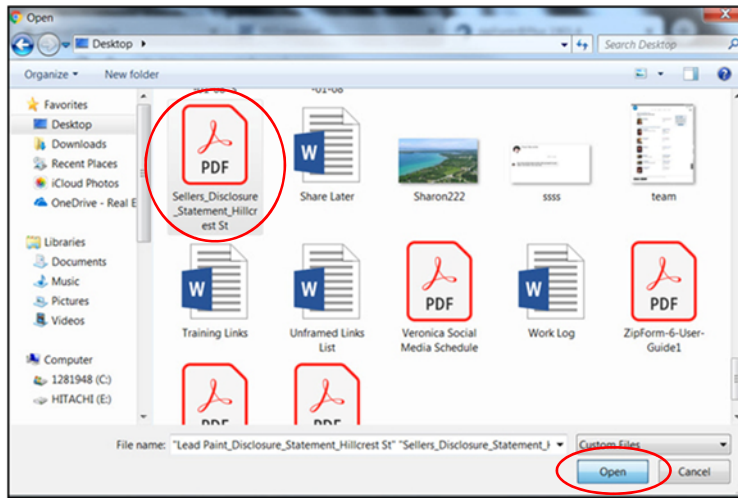
Choose **Add doc.**



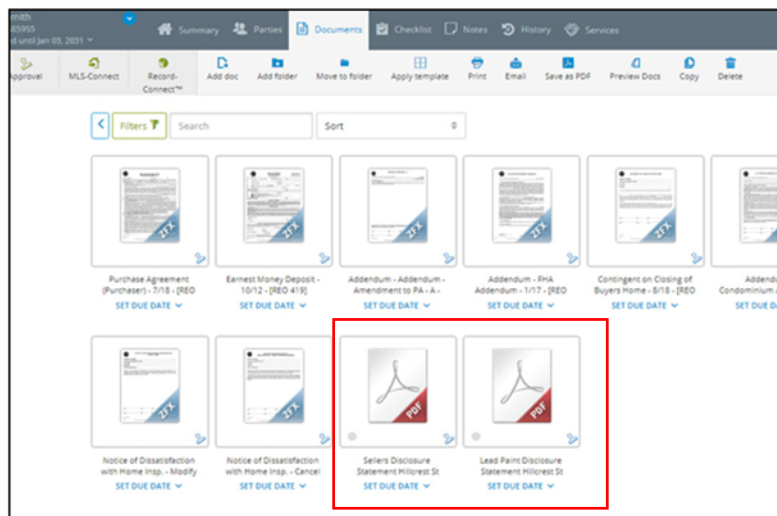
Choose **Browse for Document** if the disclosures are on your computer or choose a cloud source if they are stored in your cloud storage. You can also email the disclosures right to your transaction using your transaction's email address and then drag and drop them into your **Buyer Packet** folder.



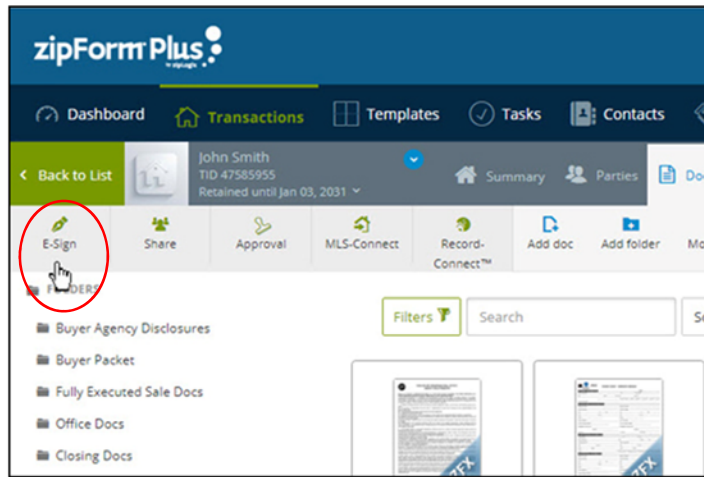
Select the disclosures and choose **Open**.



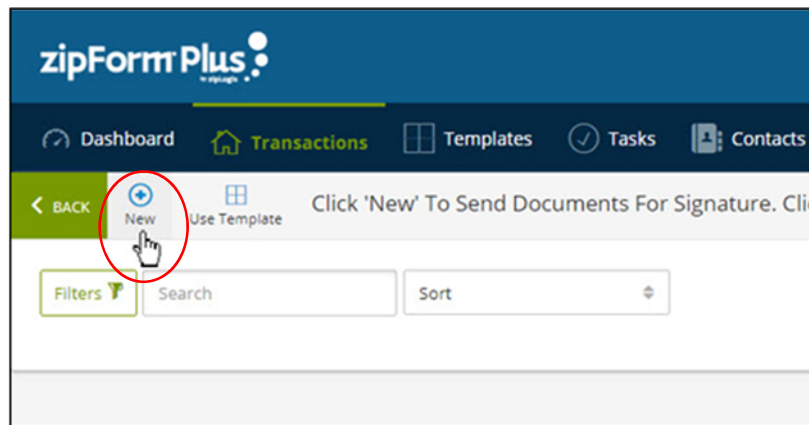
You should now see your disclosures in your **Buyer Packet** and if all of your forms are complete, you are ready to send them to your buyers for signatures.



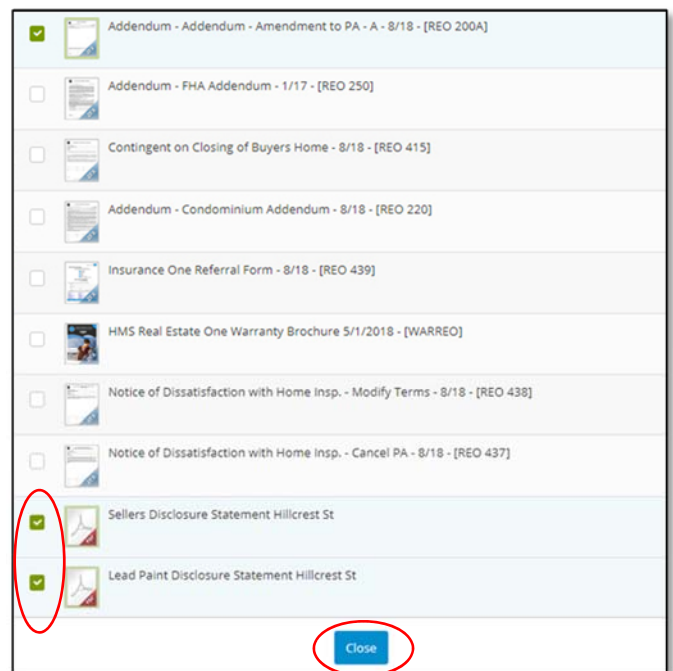
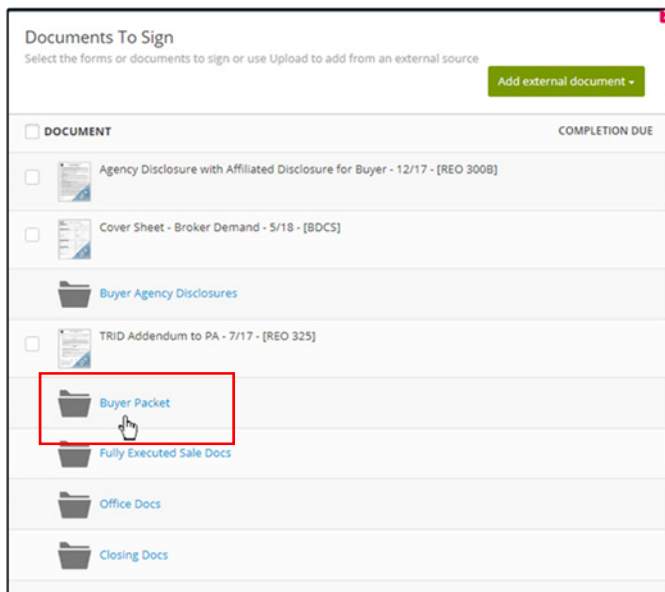
To send the forms to be digitally signed using **Docusign**, choose **E-Sign**.



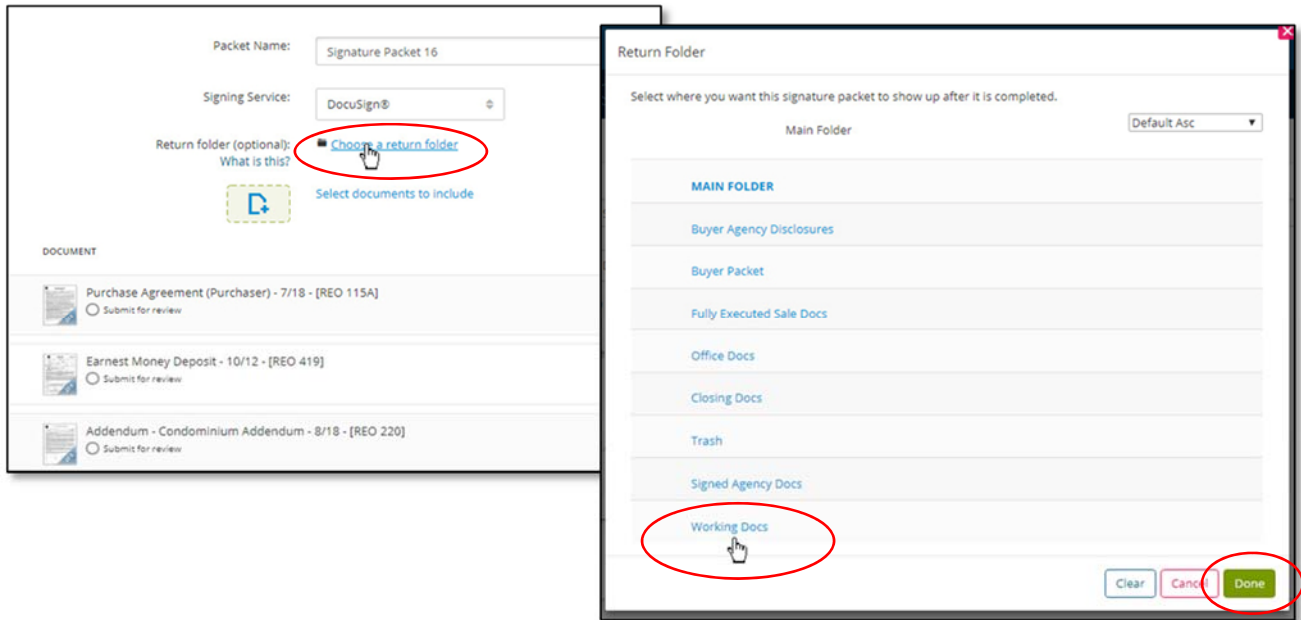
Choose **New**.



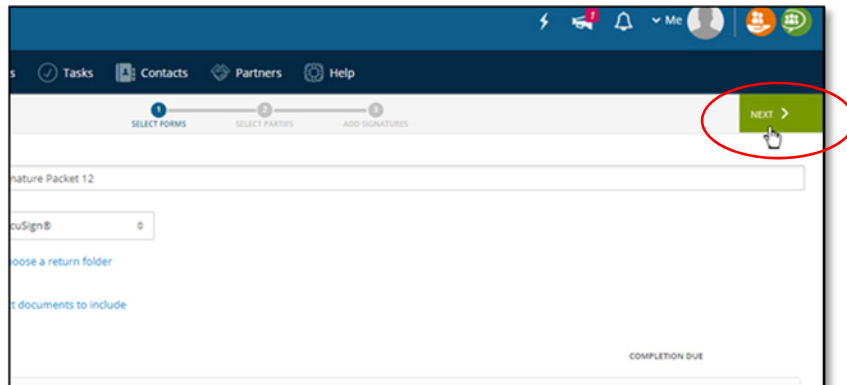
Select the documents that you would like to send to be digitally signed and choose **Close**.



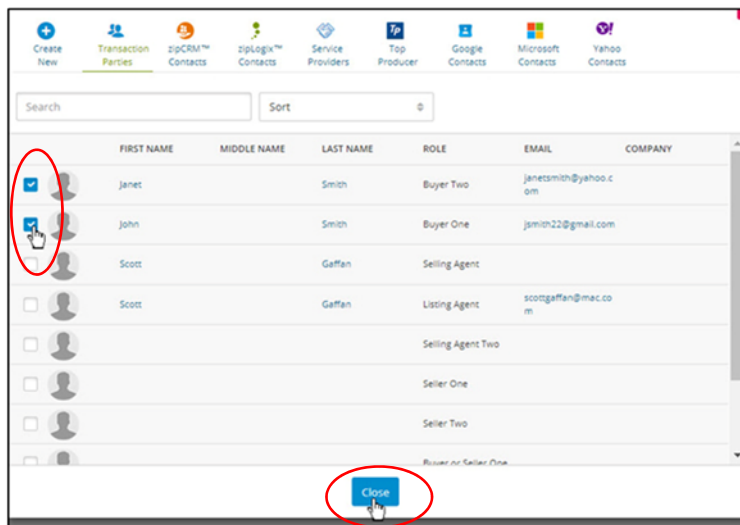
Choose the folder that you would like the forms to be placed in, when they return from being signed, by selecting the **Choose a return folder** link. Select the **Working Docs** folder, then choose **Done**.



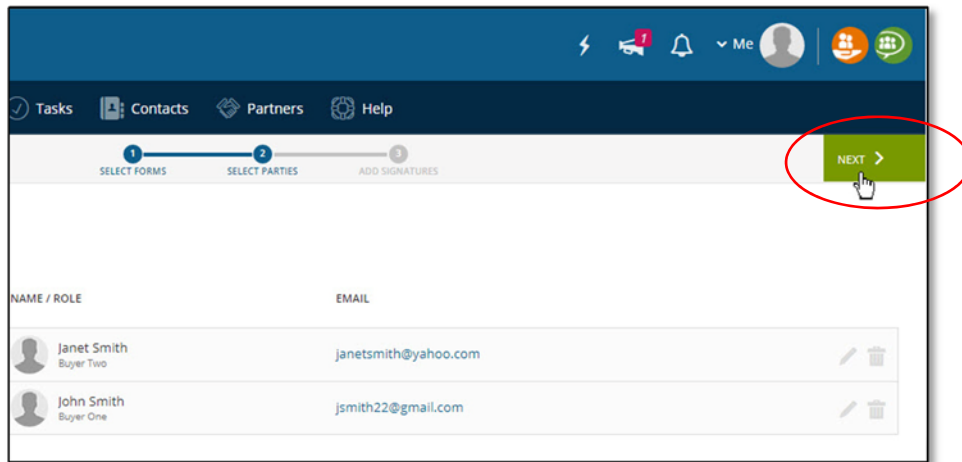
Choose **Next**.



Choose the **Parties** that you would like to include in this digital signing and then choose **Close**.



Choose **Next** again.

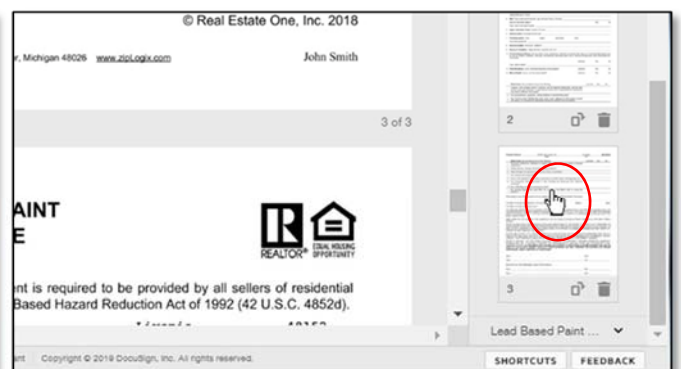


All of the forms that you selected load up into DocuSign. All of your zipTMS forms will already have all of the signature and initial fields placed. Do a quick check to make sure everything is in the right spot.

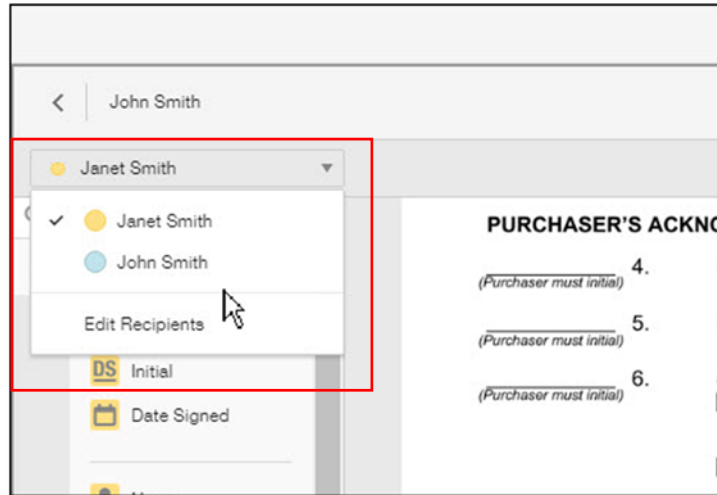
The two disclosures that you loaded up as PDF's will not have the signature and initial fields in place and you will have to add them in manually because the documents were loaded up as PDF's. You can scroll down on the main scroll bar to see all of your forms.



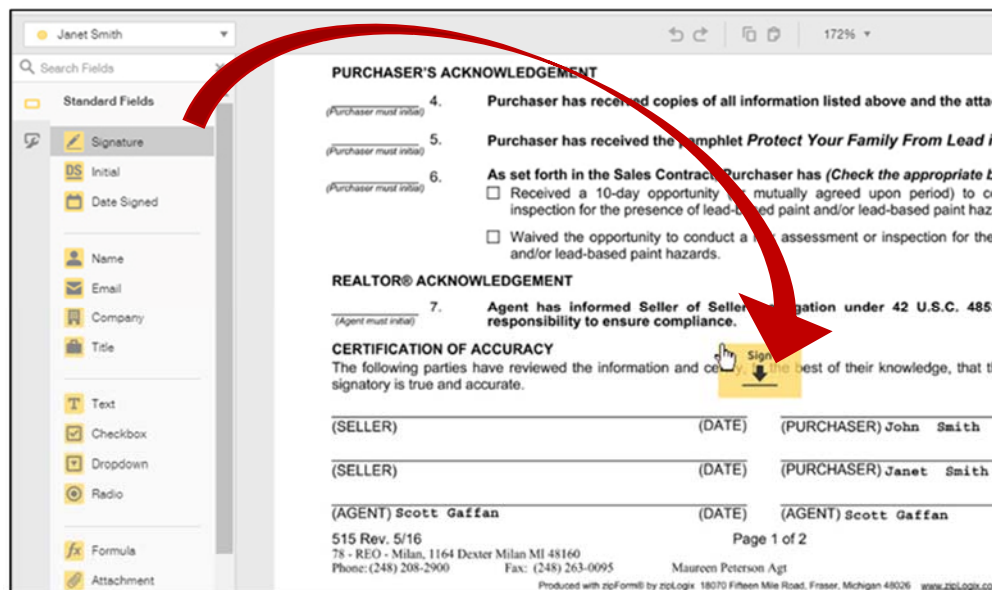
You can also select the page you would like to view from the side bar. Expand the form on the sidebar by selecting it and then select the page.



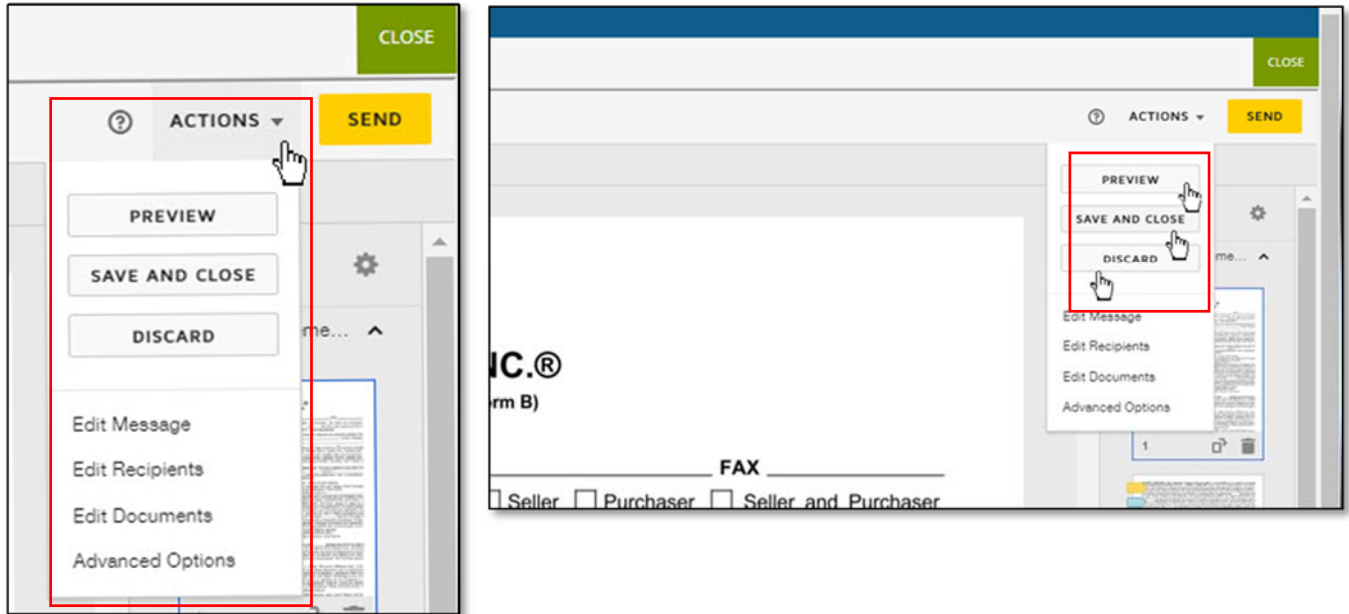
Remember that you first need to select the signer from the dropdown menu (located at the top left side of the window) that you would like to add the signatures and initial fields for. Each signer's name is color coded and all of the modifiers that you add to a form for that signer will be displayed in that same color. That makes it easy for you to check to make sure that you have added each modifier for the right signer.



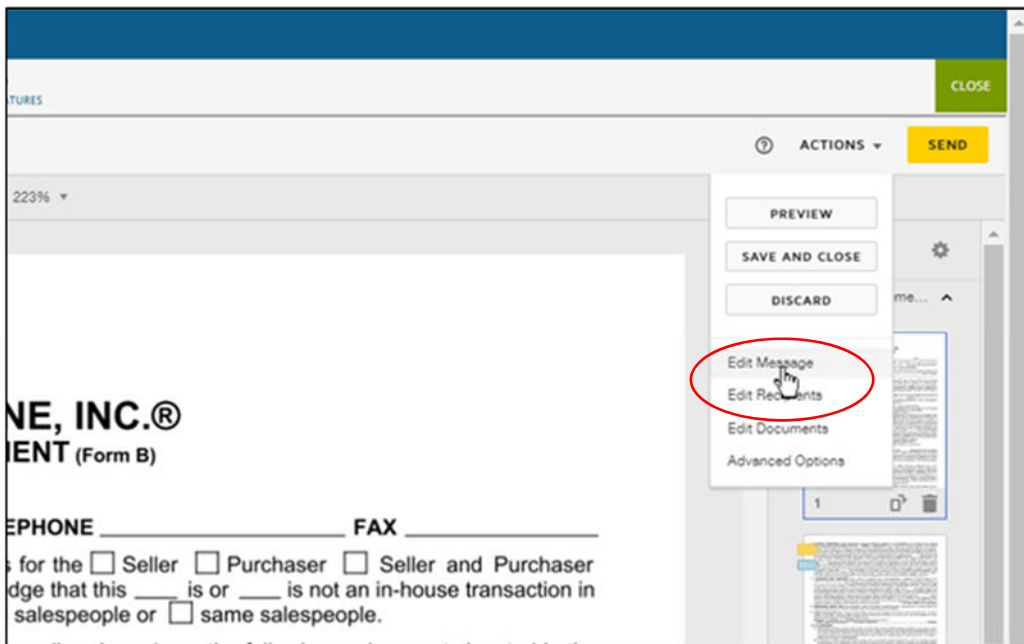
With the correct signer selected in the dropdown menu, drag and drop all of the initial and signature fields on to the forms in all of the places that they need to be for that signer. Then switch signers and do the same for the second signer. You only have to manually place fields on forms that were sent through to **DocuSign** as PDFs. All of the other forms should already have them in place when they open in **DocuSign**.



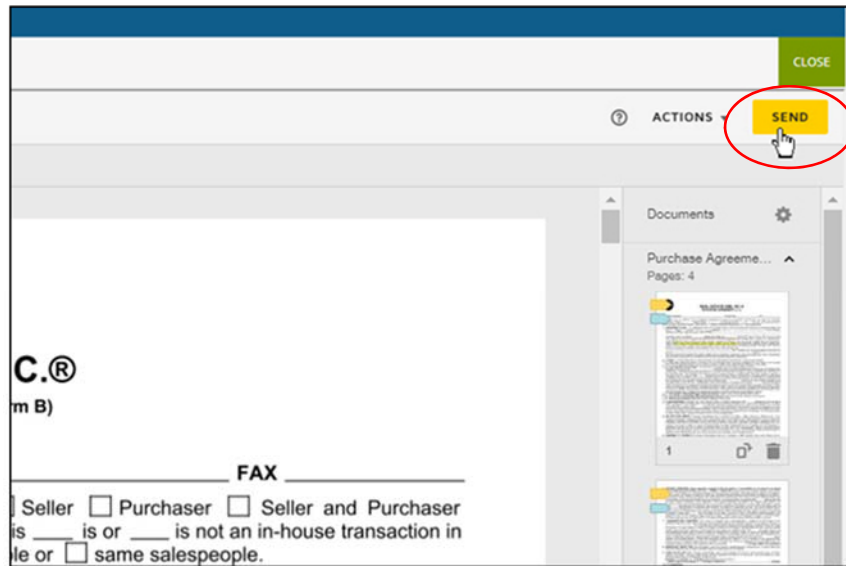
When all of your documents are checked and ready to be sent out, you can drop down the **Actions menu** and choose to **Preview, Save and Close** (saves as a draft in DocuSign) or **Discard** (deletes the DocuSign envelope).



You can also choose **Edit Message** to send a single message to both Signers or a separate message to each individual Signer.

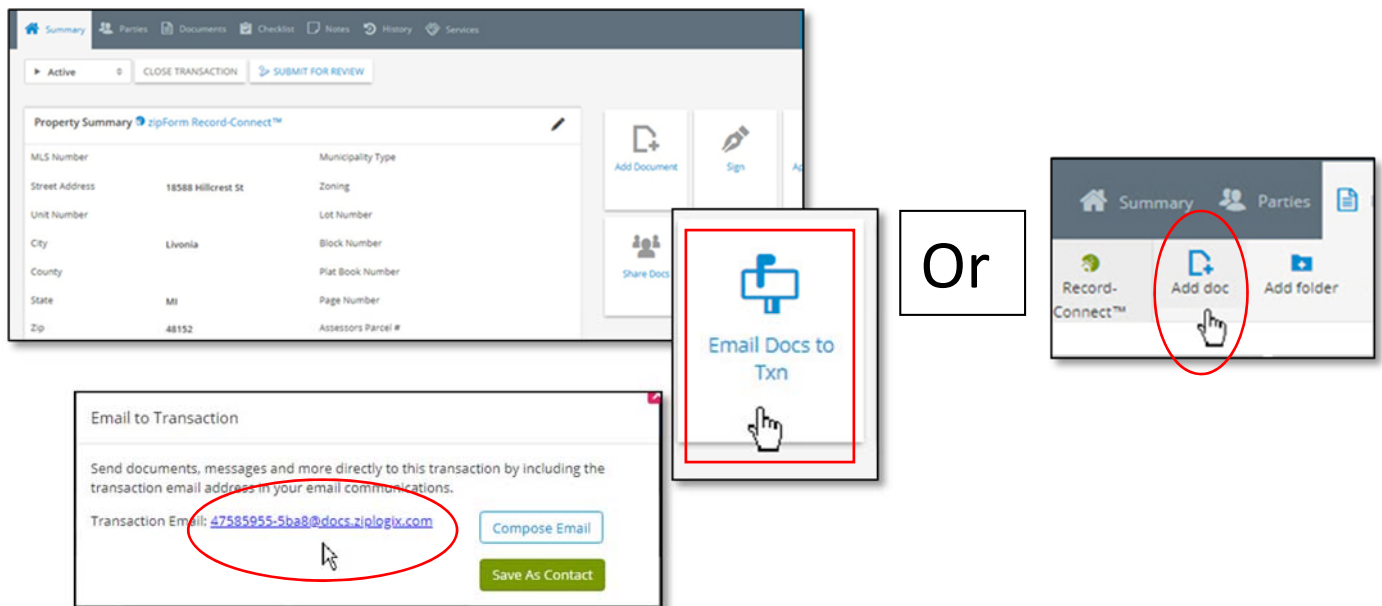


When you have everything checked and ready to go, choose **Send**.



You will be emailed a copy of each of the digitally signed documents that you sent to your buyers via **DocuSign**. A copy of all of the signed documents will also be placed in the zipTMS folder that you selected as your **Return Folder**, your **Working Docs** folder.

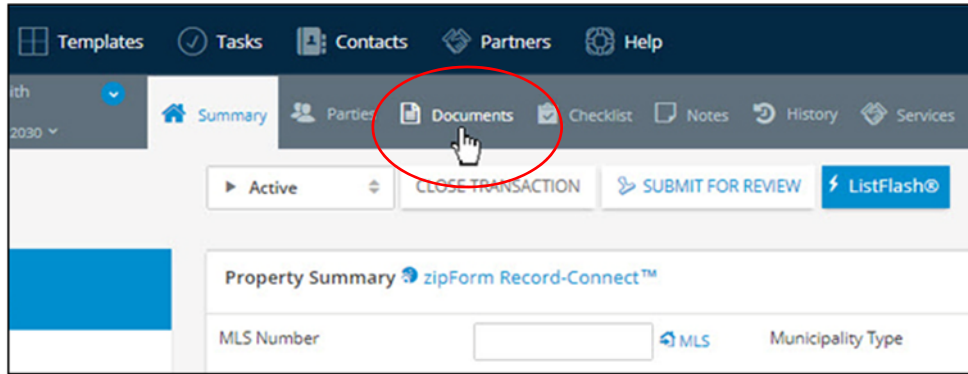
If you acquired ink signatures on any of the documents, you will need to scan the signed documents and either email them directly to your transaction or save them to your computer and upload them to your transaction's **Documents Folder** and add them to your **Working docs** folder.



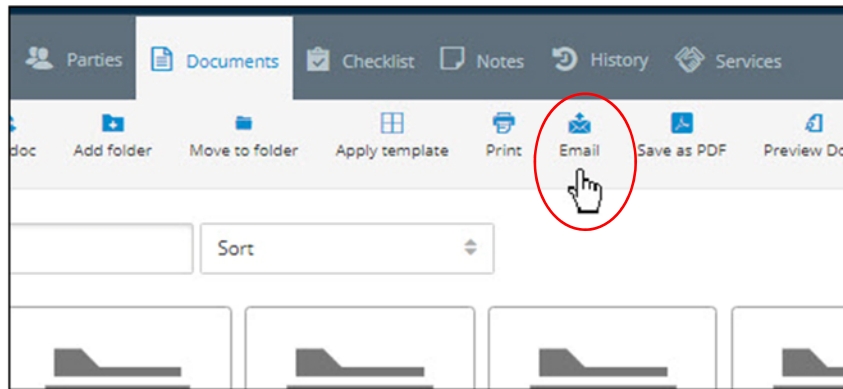
Present offer to listing agent for negotiation and signatures.

You can email your offer to the listing agent directly from zipTMS.

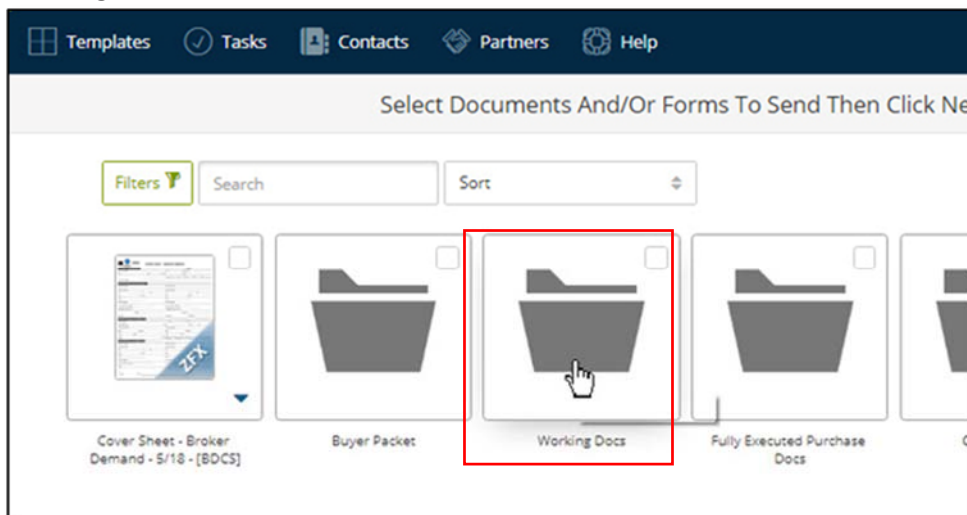
Choose **Documents** to open your **Documents** folder.



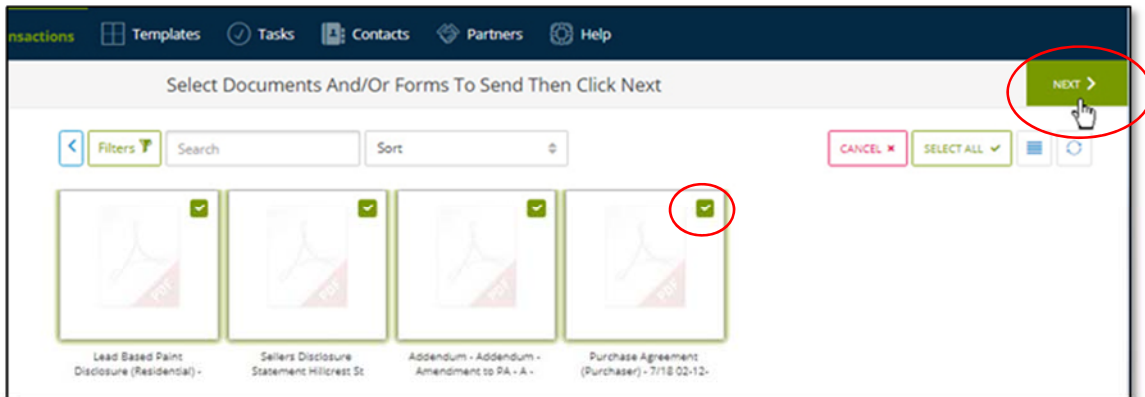
Choose **Email**.



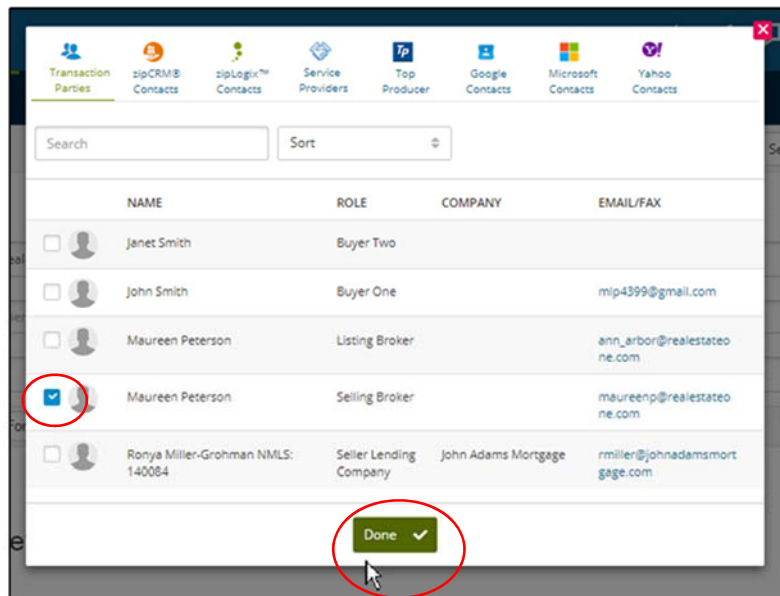
Choose your **Working Docs** folder.



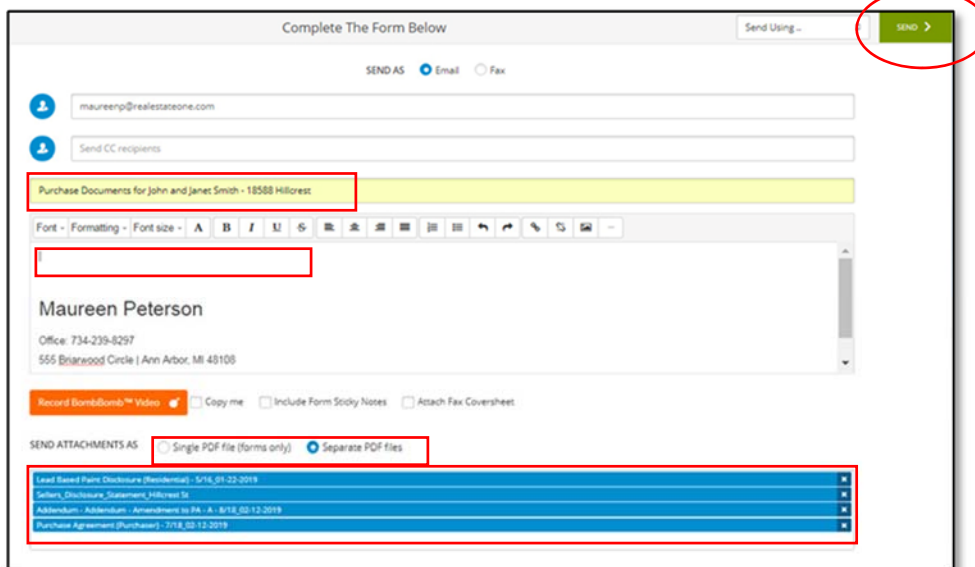
Select each of the documents that you would like to include with the offer and choose **Next**.



Select the listing agent from the transaction parties list and choose **Done**.

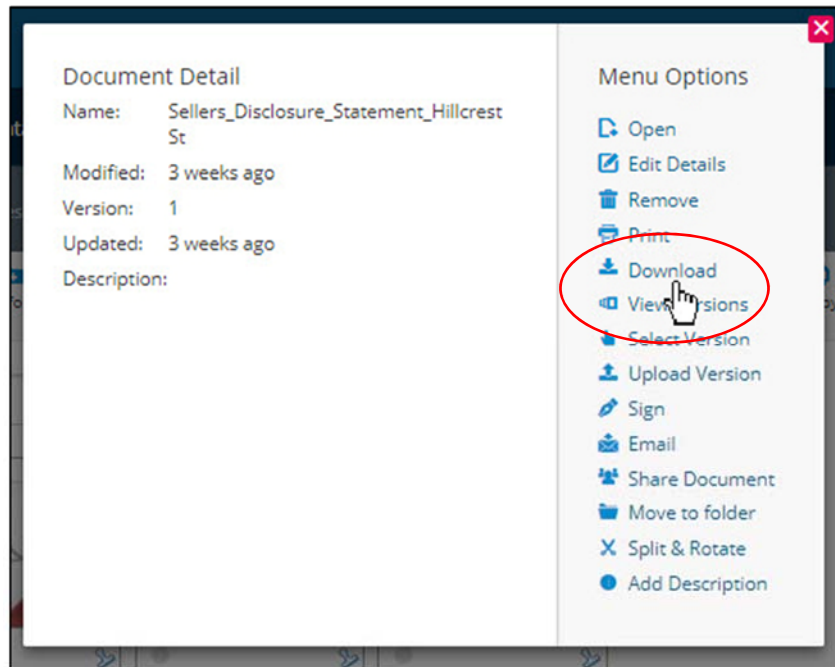
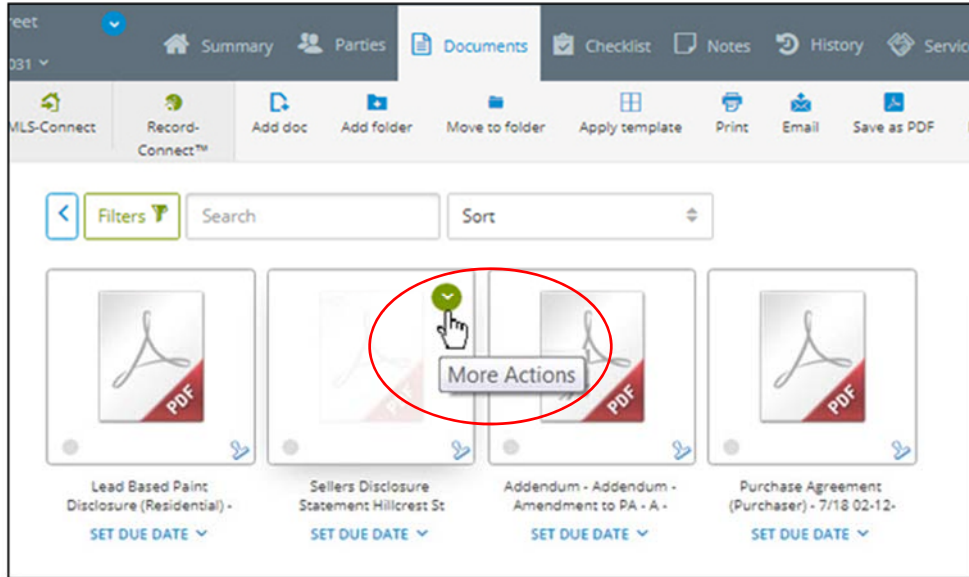


Enter an email **Subject**, add a personal **Message**, check to make sure you attached all of the correct **Documents**, select the **Separate PDF files** option and choose **Send**.



You can also download a copy of each of the signed documents to your computer and email them to the Listing Agent using your own email account.

Open your **Working Docs** folder and open the **More Actions** menu for each document and choose **Download** from the **Menu Options**.

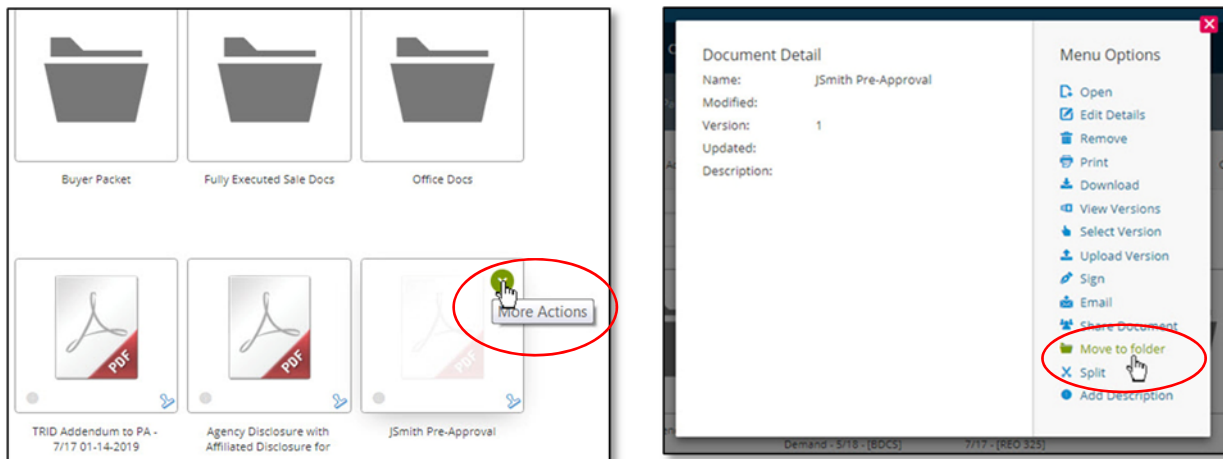


Obtain fully executed package from Listing Agent.

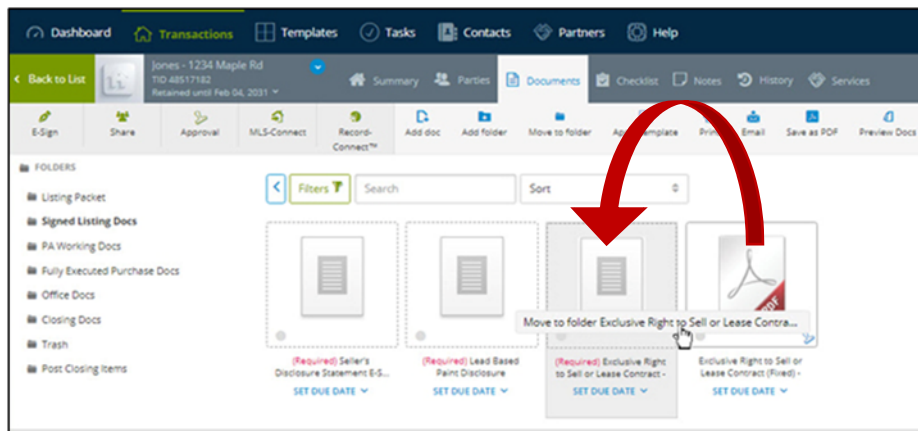
Place fully executed agreements and all related documentation (including signed agency documents) in the **Fully Executed Purchase Docs** folder.



You can do this by emailing the documents to your transaction or by uploading them to the transaction if they are on your computer or stored in your cloud storage. You can move documents that are already in your transaction's documents folder by dragging and dropping them or by choosing **Move to folder** from the document's **More Actions** menu.

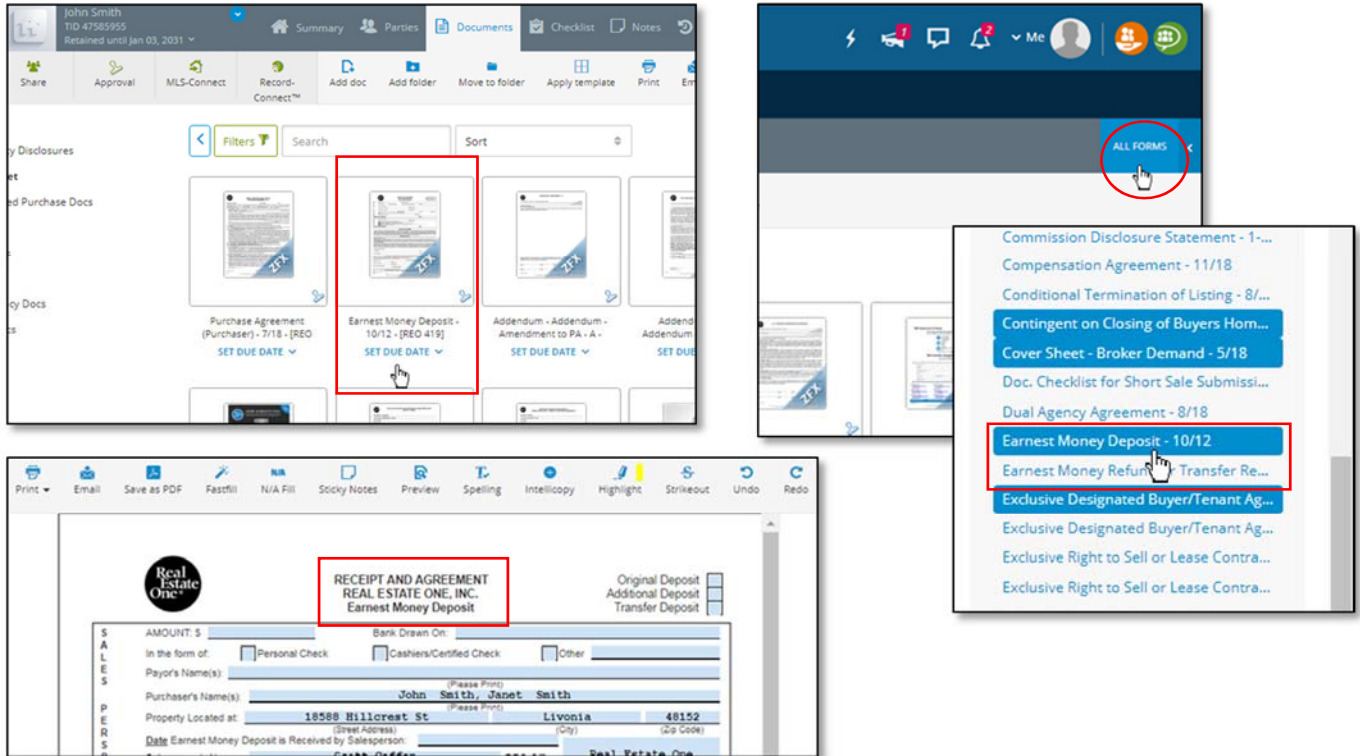


Once you have moved all of your completed documents to your **Fully Executed Purchase Docs** folder, you will also need to drag and drop them onto their corresponding document placeholders to successfully place your documents and satisfy the required placeholder.



Earnest Money Deposit

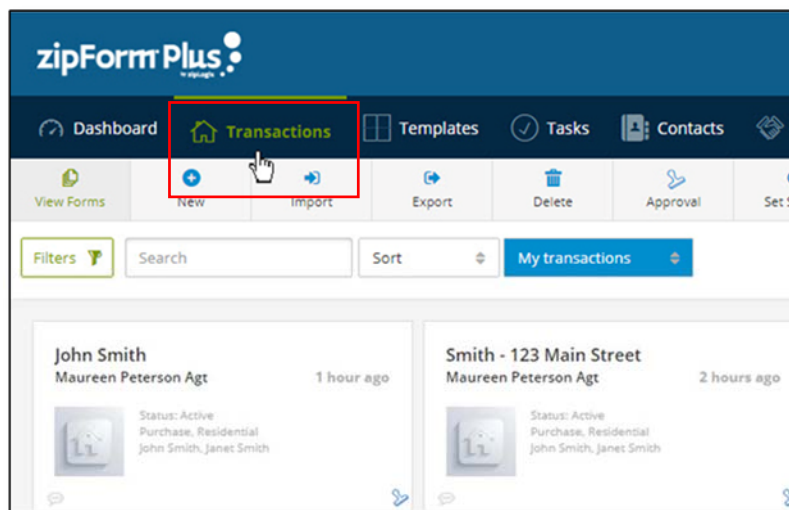
Obtain Earnest Money Deposit check. If you are using electronic deposit to submit your Earnest Money Deposit, see the **Electronic Deposit using Deposit Express** section below. Complete the **Earnest Money Deposit Receipt and Agreement** form in zipTMS. This form should already be in your transaction's documents folder if you created the transaction using your office template. If it is not, simply add it by selecting the **All Forms** button and choosing the **Earnest Money Deposit** form (form 419).



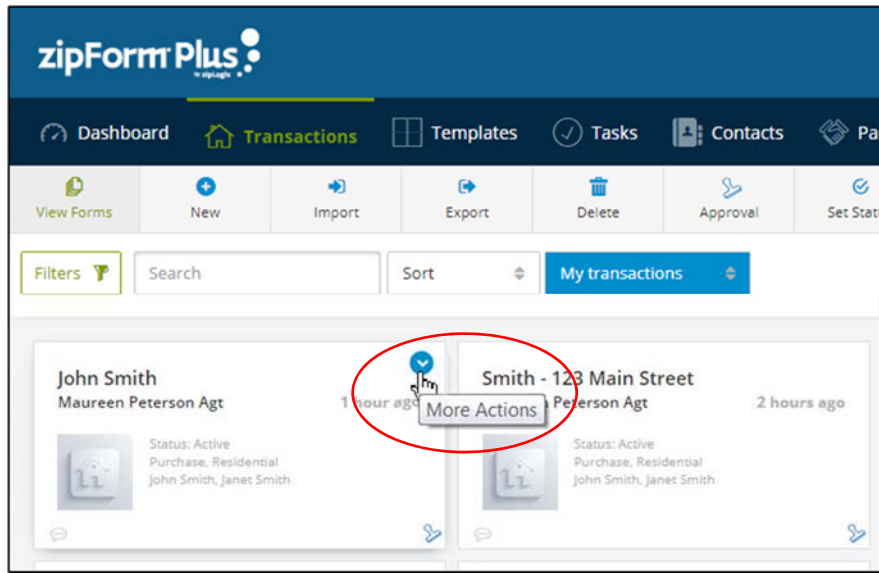
Obtain buyer's signatures by sending the form digitally through DocuSign or by printing and obtaining ink signatures. Place the paper check and the **Earnest Money Deposit Receipt and Agreement** form in the **Earnest Money Secured Lock Box** for your office to process.

Update Transaction Name

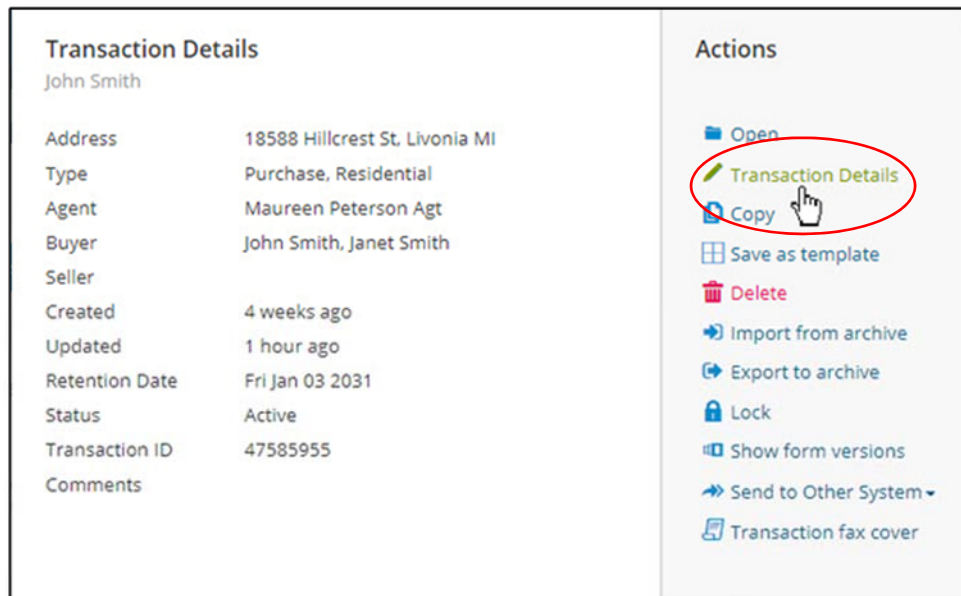
Update the transaction name in zipTMS to reflect the standard naming convention eg. **Smith - 123 Main St**. To update the transaction name, select **Transactions**.



Open the **More Actions** menu of your transaction.

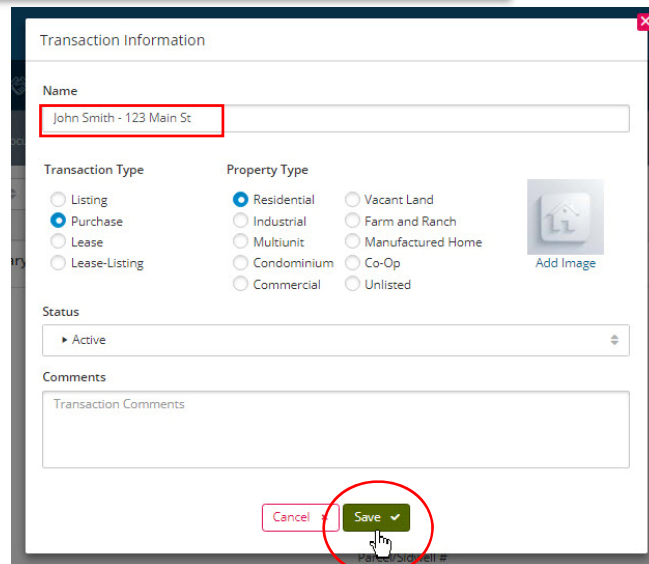
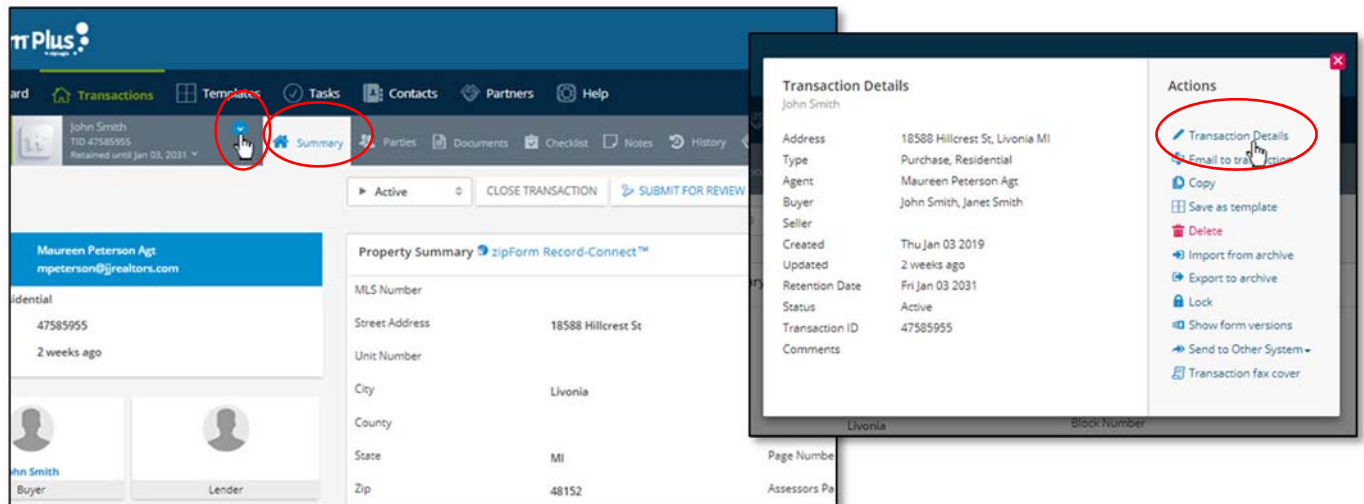
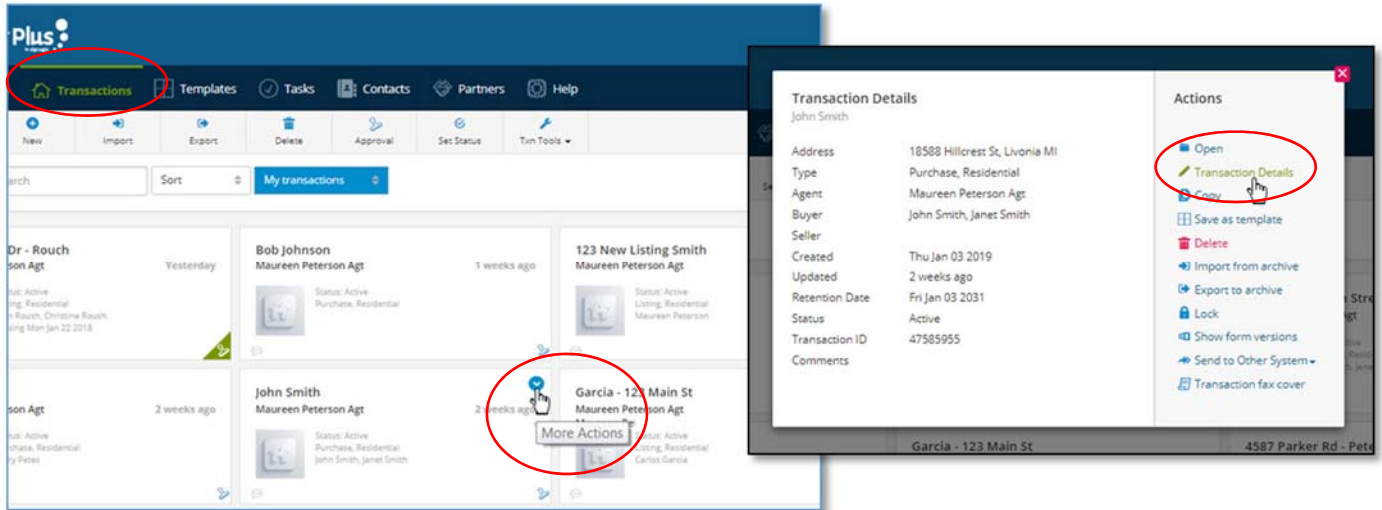


Choose **Transaction Details** from the **Actions Menu**.



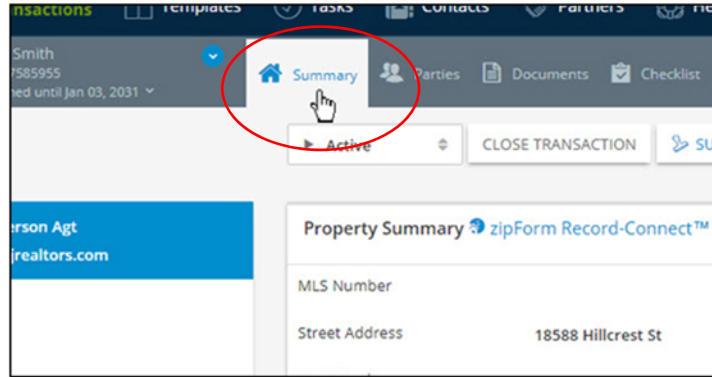
Append the transaction name in zipTMS to reflect the standard naming convention (**your client's last name and then first name and the property address e.g. Smith John - 123 Main St**)

You can update the transaction name in the **Transactions Details Dialogue Box** that can be accessed from the **More Actions Menu** from your main **Transactions Page** or from the **Summary Page** of your transaction.

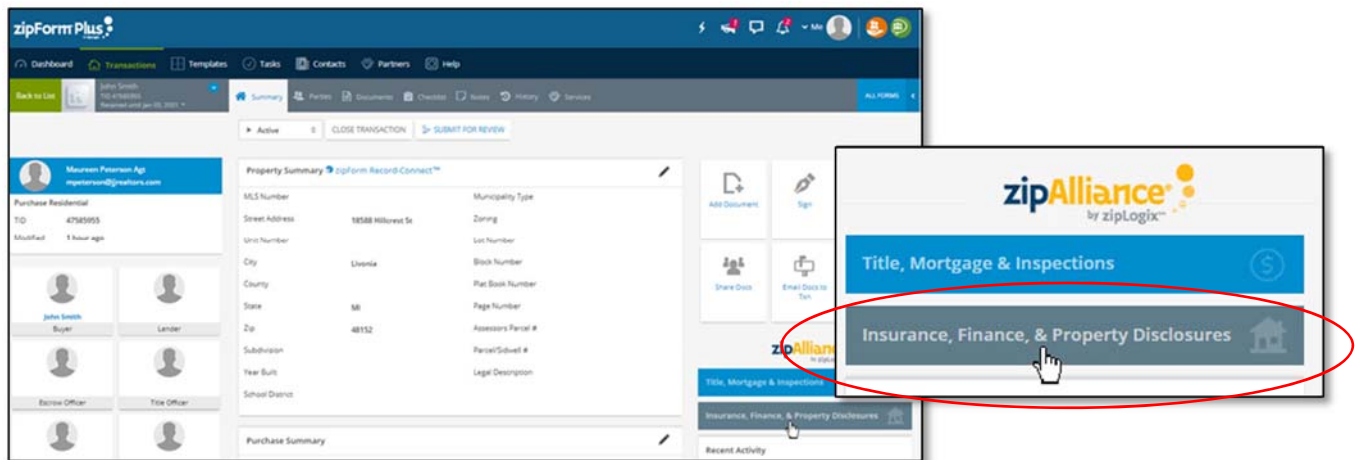


Electronic Deposit using Deposit Express

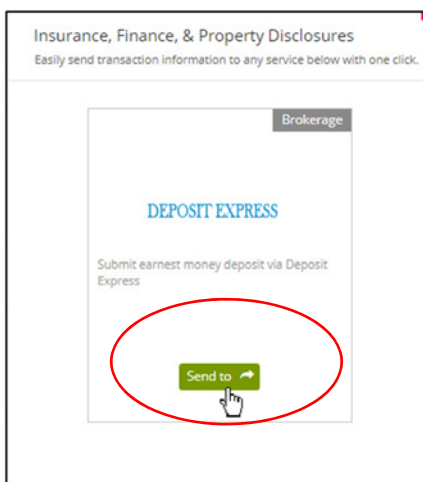
To set your buyer up with access to submit their Earnest Money Deposit electronically using **Deposit Express**, open your transaction and go to the **Summary** page. The **Summary** page is the first page that displays when you open a saved transaction.



Select **Insurance, Finance & Property Disclosures**.



Choose **Send to**.



Fill in the **Deposit Express Form**, verify its accuracy and choose **Send**.

DEPOSIT EXPRESS Deposit Express

Deposit Express instruction

The information below will be sent to selected buyer via email. Please verify its accuracy and press "Send" to proceed.

Property Address

Street Address 1 18588 Hillcrest St

Street Address 2

City Livonia

State MI

Zip Code 48152

Buyer

Selected Buyer Buyer One

Full Name John Smith

Email jsmith22@gmail.com

Payment

Payment amount 0

Comment

Type here...

Characters remaining: 1000

* indicates required fields

Close Send

Deposit Increase?

For a detailed breakdown of what the buyer receives when you send them a **Deposit Express form**, see the additional **Deposit Express PDF manual**.

When the buyer submits the **Deposit Express** payment, an email will be sent to the Buyer/Client, REO Accounting, to you and the office administrator confirming the payment and it can be forwarded on to the lender for proof of the **Earnest Money Deposit**. A copy of the email will also be automatically added to the zipTMS transaction.

zipForm Plus

Administrator Notification Email

Initial Deposit was credited

Real Estate One, Inc. received an Earnest Money Deposit (EMD) via Deposit Express, ACH as follows:

Property Address: 5325 Abbey Road
Oakland Township, MI

Amount: \$5,000

Bank Confirm #: 3026904204

Buyer Name: Gregory J Hinkson Trust

Agent Name: Manuel Florescu

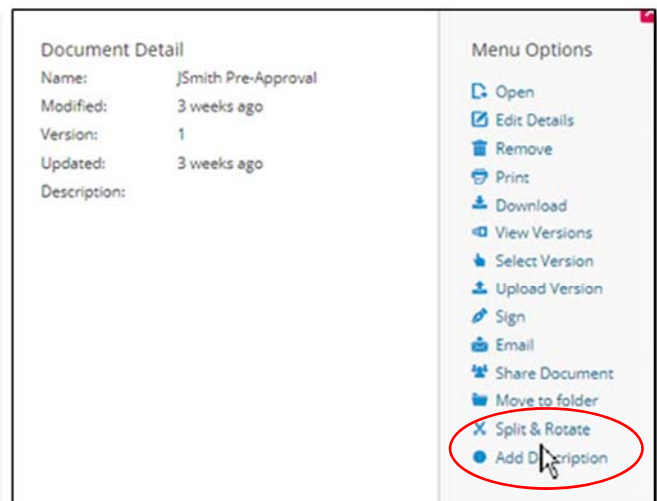
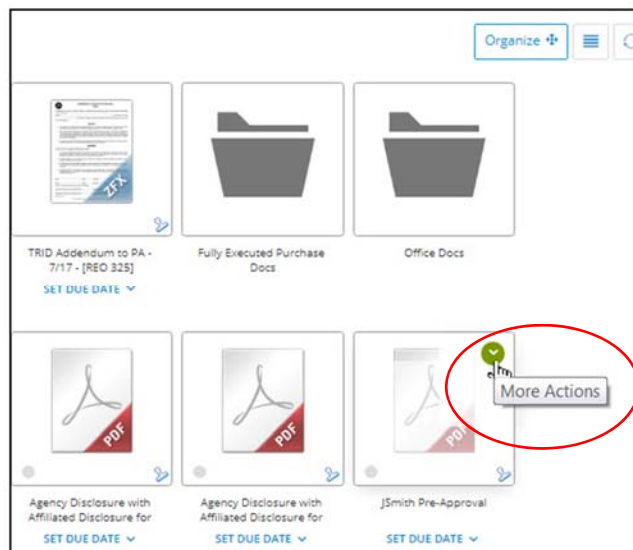
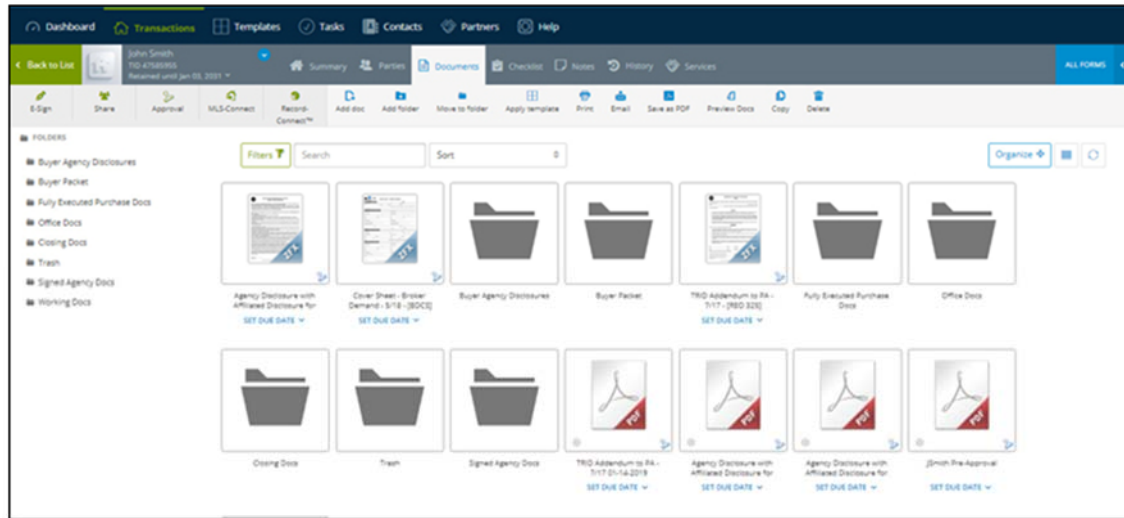
Office Name: 34 - REO - Troy

NOTE: DEPOSIT EXPRESS funds are NOT available for closing until the 4th business day following the initial deposit.
Example: Initial Deposit on Monday is not available for closing until Friday.

DEPOSIT AGREEMENT and REFUND POLICY - Your payment was an Earnest Money Deposit (EMD) in connection with an offer made on the above referenced property. It will be deposited into the Brokers non-interest bearing trust account. In the event your deposit does not clear due to non-sufficient funds a fee of \$25 will be charged. If the property does not close, the funds may be returned in accordance with the following REFUND POLICY: 1) Offer Not Accepted - Your EMD will be returned to your account promptly. 2) Accepted Offer - If

Final Review of Documents

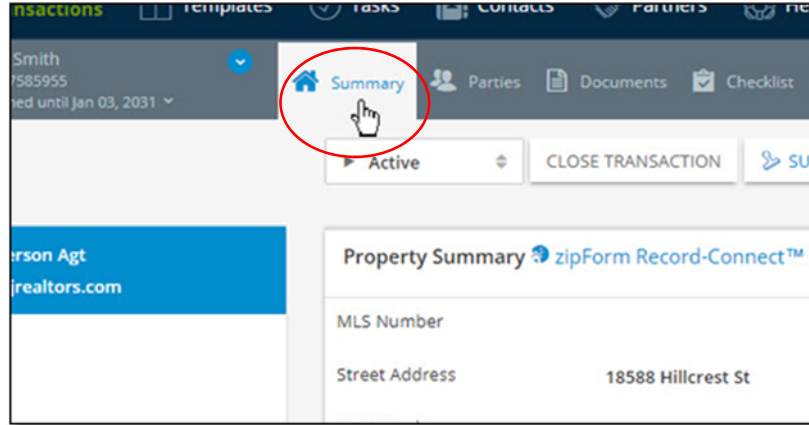
Open your zipTMS **Documents folder** and check to make sure that all of the forms that your office requires have been added, are signed correctly and are in the correct folders to make it easy for your office administrator to find them. Your **Cover Sheet Broker Demand** form should be in the main **Documents Folder**, All of your final documents should be in the **Fully Executed Purchase Docs Folder**, Your signed **Agency** forms should be in your **Signed Agency Documents** folder or transferred to your **Fully Executed Purchase Docs** folder. PDF documents should be split into individual forms using zipTMS's split feature. Reviewed in the **Splitting a multi-page PDF** section of this manual (page 15 and 16).



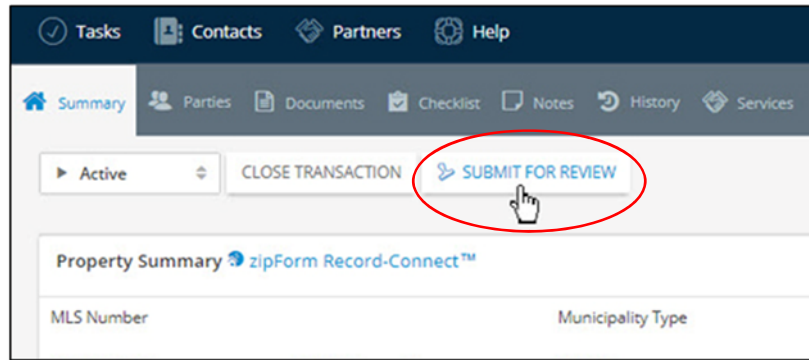
Submit for Review

When you've completed your final documents review, you're ready to send your transaction on to be reviewed by your office administrator.

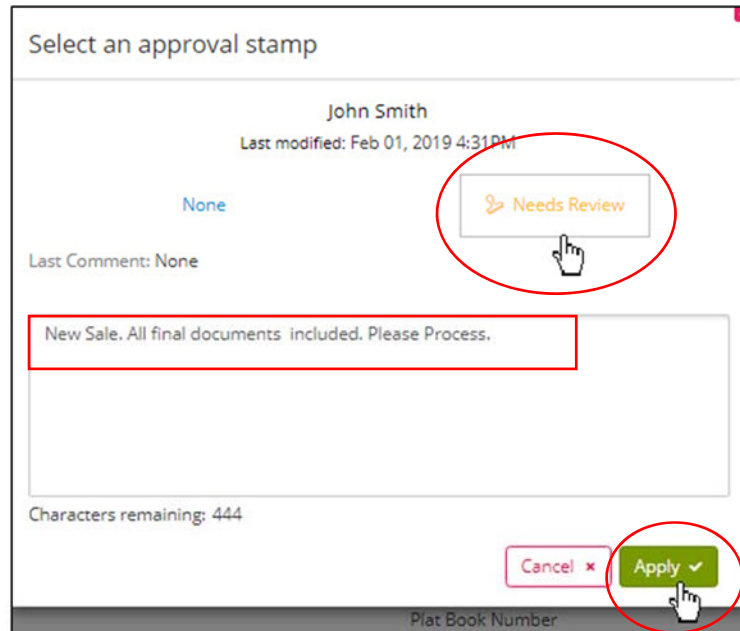
Return to the **Summary** page of your transaction by selecting **Summary**.



Choose **Submit For Review**.

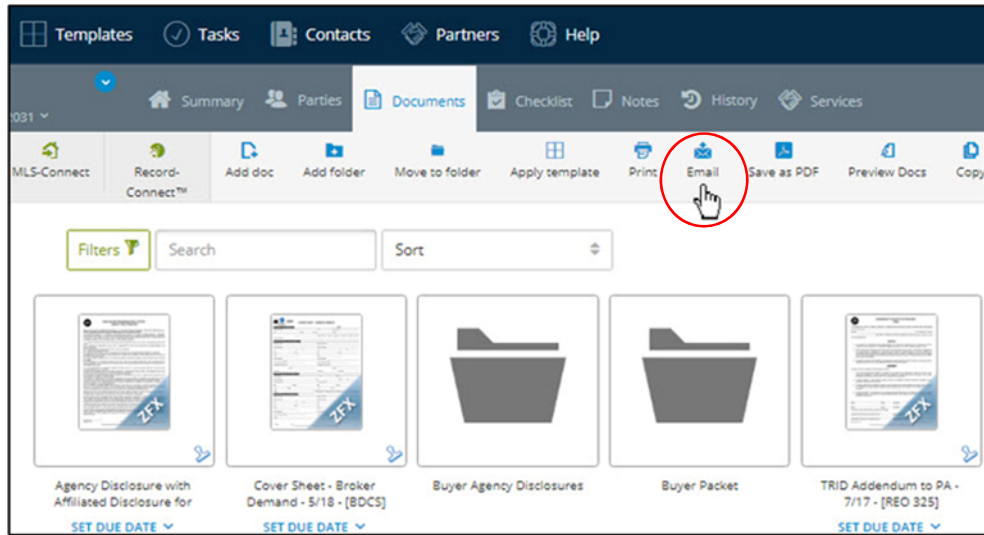


Add a comment to notify your office administrator what is being submitted - **New Sale please process**. Choose **Needs Review** and then **Apply** to submit your transaction for review.

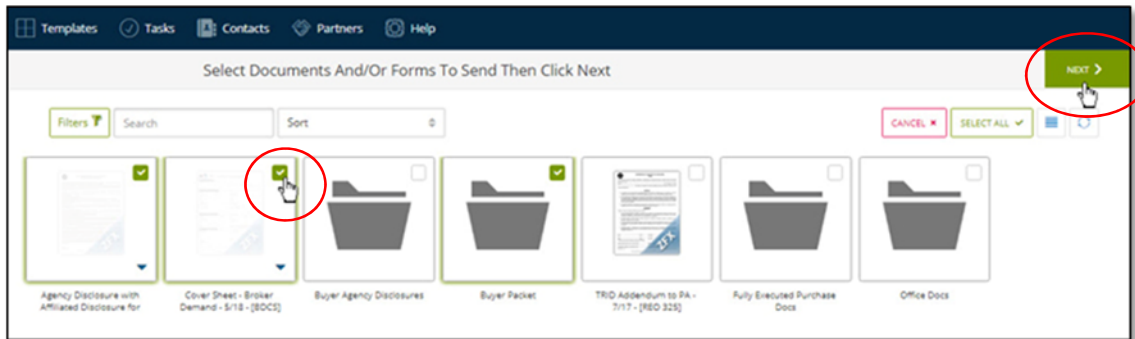


Send Purchase Agreement and related documents to Lender.

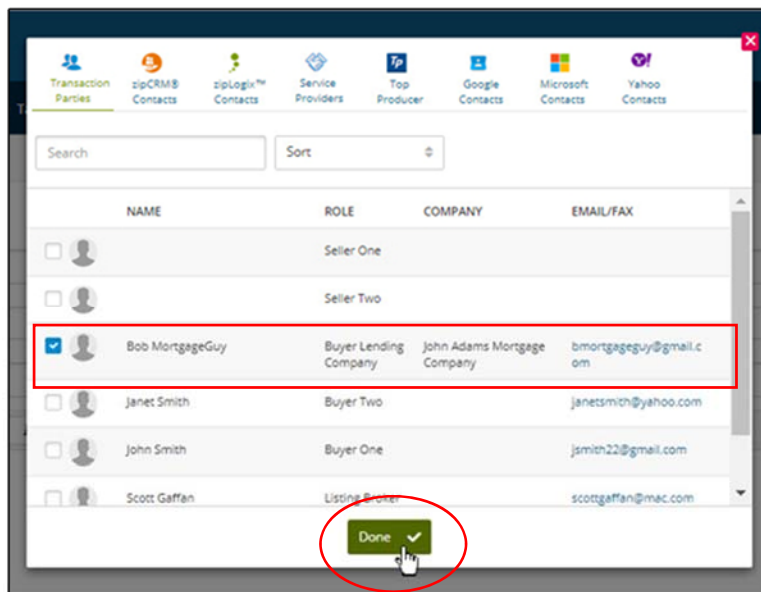
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