zipTMS®

User's Guide

New Listing

FAMILY of COMPANIES

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

New Listing

AGENT STEPS

Start a New Transaction (naming it "Client Last Name, First Name - Address" (i.e. Smith Mary - 123 Main St).
Apply Office or Personal Template for the New Listing.
Add parties to the transaction in the Parties tab.

- Seller
- Listing Agent
- Title Company
- Supervisory Broker

Prepare the documents in the Documents tab; maintaining order within folders.
Cover Sheet – Broker Demand
Within the Listing Packet Folder

- Agency Disclosure with Affiliated Business Arrangement Disclosure
- Exclusive Right to Sell or Lease
- Seller's Disclosure (note: all fields are required if sent via Docusign)
- Lead Based Paint Disclosure & LBP Booklet
- Data/Profile Sheet
- Showing Instructions
- Dear Homeowner Letter
- Association Info Request (if applicable)
- Payoff Requests (if applicable)

other docs required by listing circumstances or office
Acquire digital signatures or ink signatures.
Obtaining digital signatures.
Select e-Sign with the zipForm transaction.

- Select the forms to be signed.
- Set the return folder to "Signed Listing 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

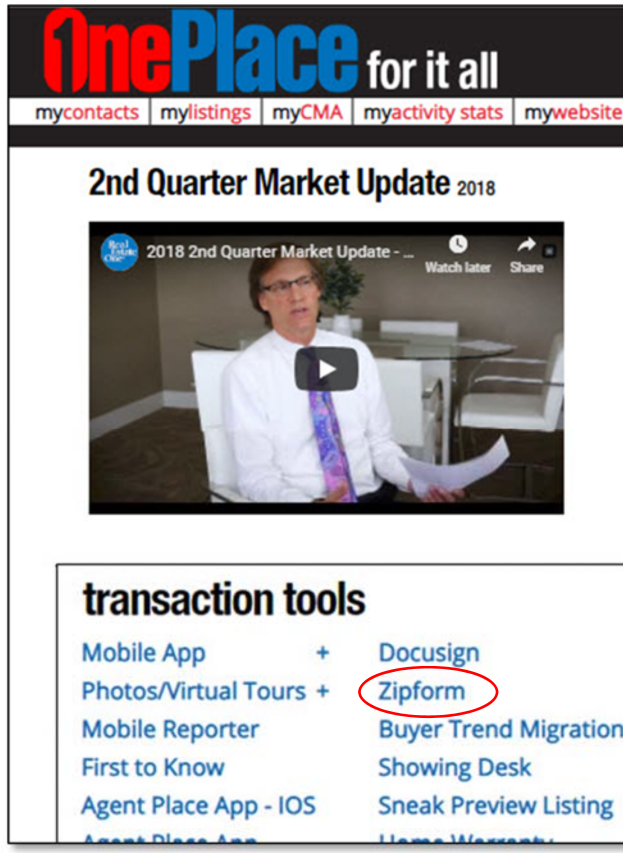
Obtaining ink signatures.

- 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 Listing Docs folder.
- Separate signed documents with the splitting tool and fill placeholders.

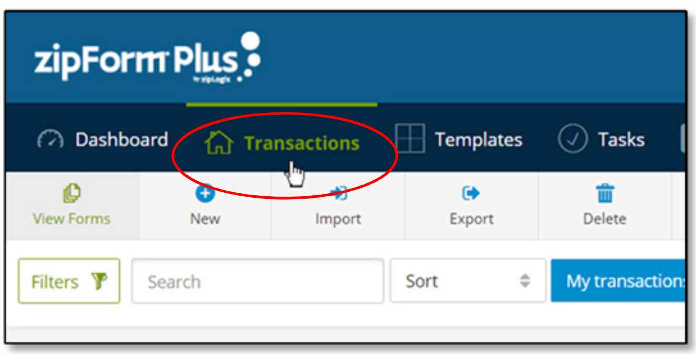
Enter the listing into the MLS with photos and attach disclosures.
Submit the file to the office digitally by clicking SUBMIT FOR REVIEW on the Summary tab in zipForm; enter a comment to tell Admin what is being submitted (i.e. New listing please process).
If applicable, request and review pre-title commitment and send to Seller(s) for their review and approval.

New Listing

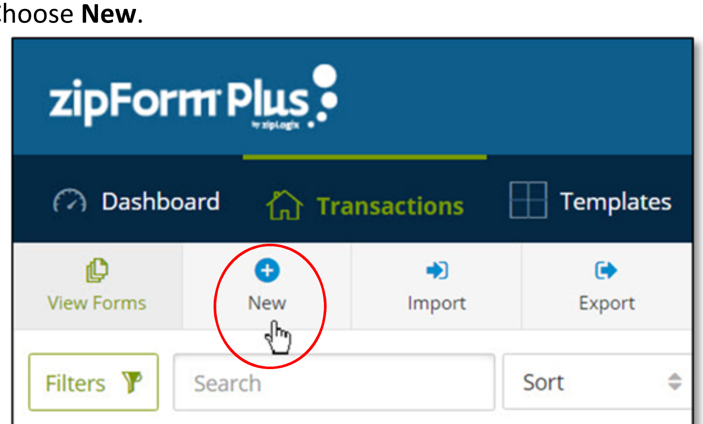
Log in to **zipformplus.com** or access the **Zipform** shortcut from the **OurOnePlace.com** home page.



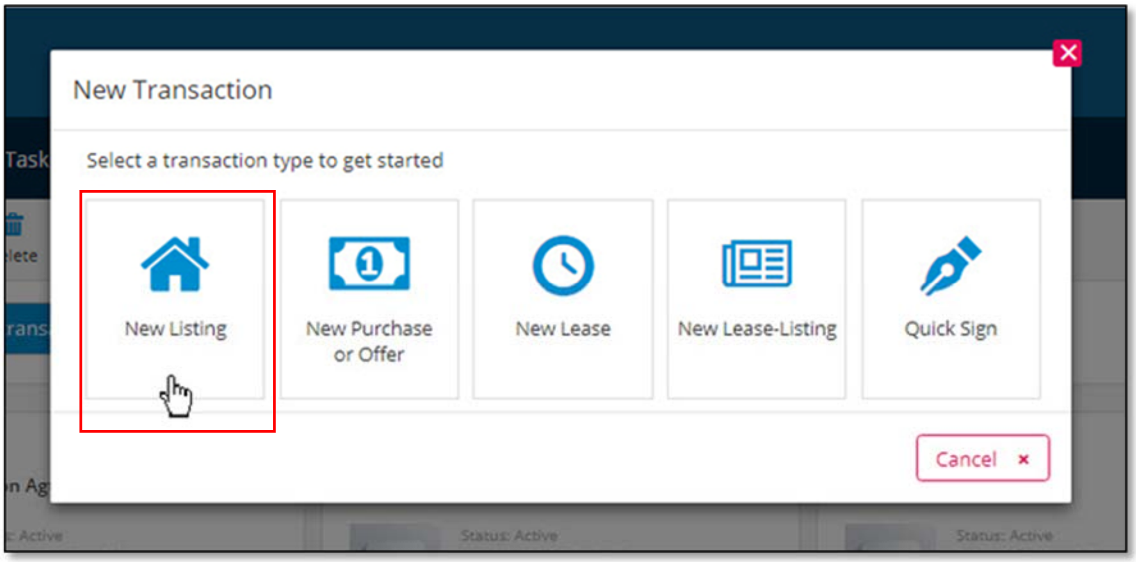
Choose **Transactions**.



Choose **New**.



Choose **New Listing**.



Transaction Information

Enter a **Name** for your new transaction (Use your client's last name then first name and the property address e.g. Tom Jones - 123 Maple Rd)

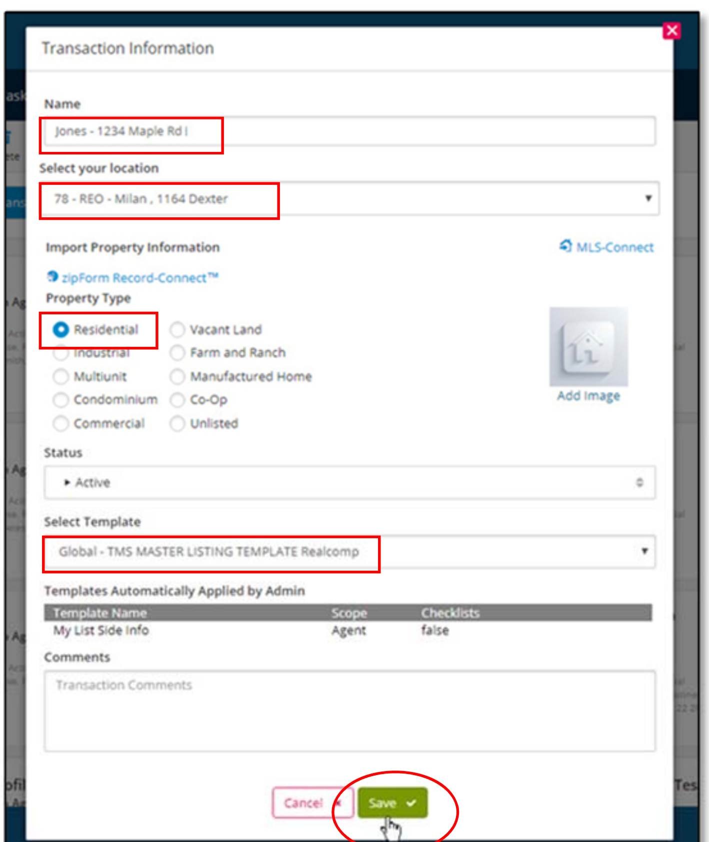
Make sure that the **Select Your Location** drop down menu is set to your office.

Select a **Property Type**.

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

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

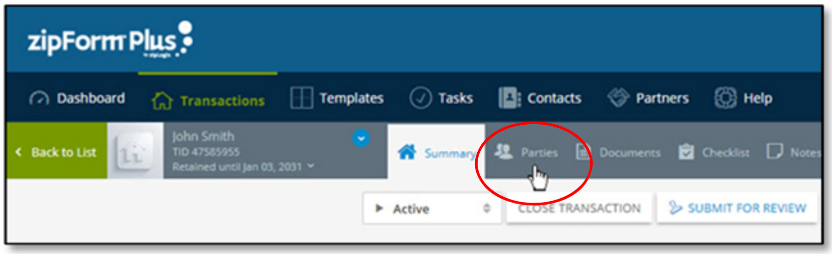
Choose **Save**.



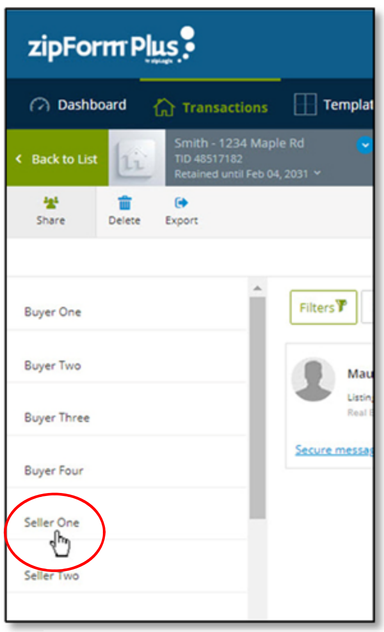
The transaction is now saved and available in your **Transactions list**.

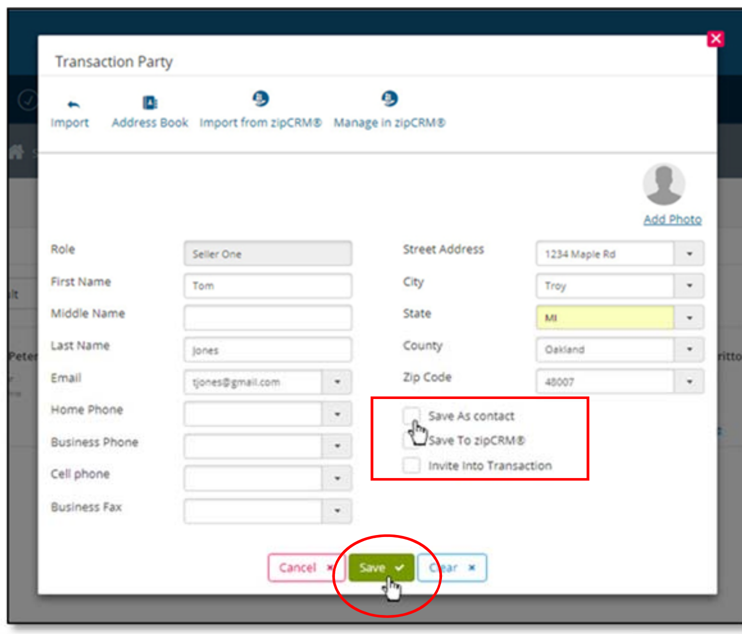
*If you applied your office **Template** when you created this transaction all of your blank forms and folders were automatically added to your **Documents folder**. If you do not apply a template when creating a transaction, you will need to manually add the individual forms and folders to your **Documents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

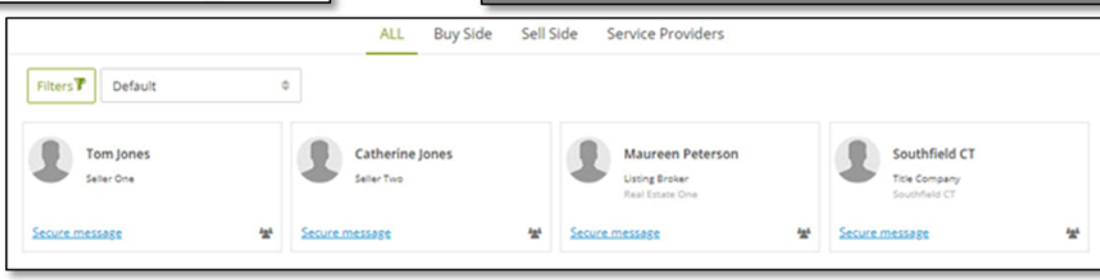
Add the individual parties to your Transaction by selecting the **Parties tab**.



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. At this stage you can add the **Seller/Sellers**, the **Listing Agent** and **Listings Brokerage** and the **Title Company**.



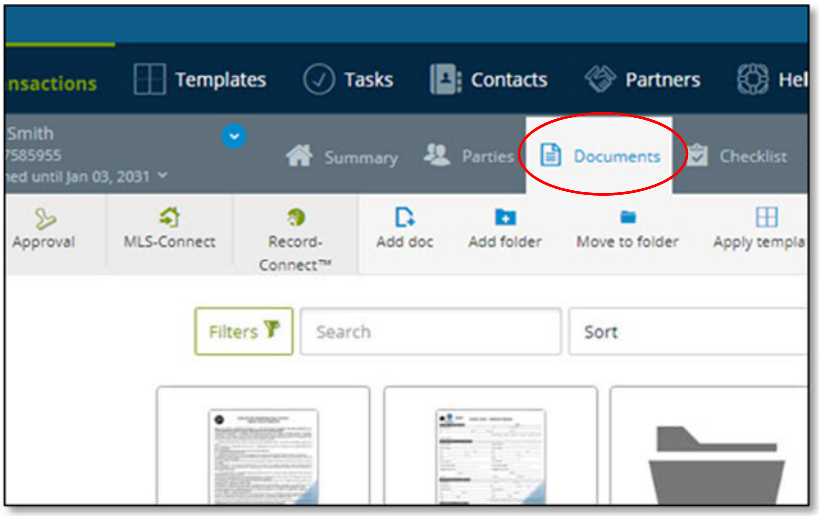




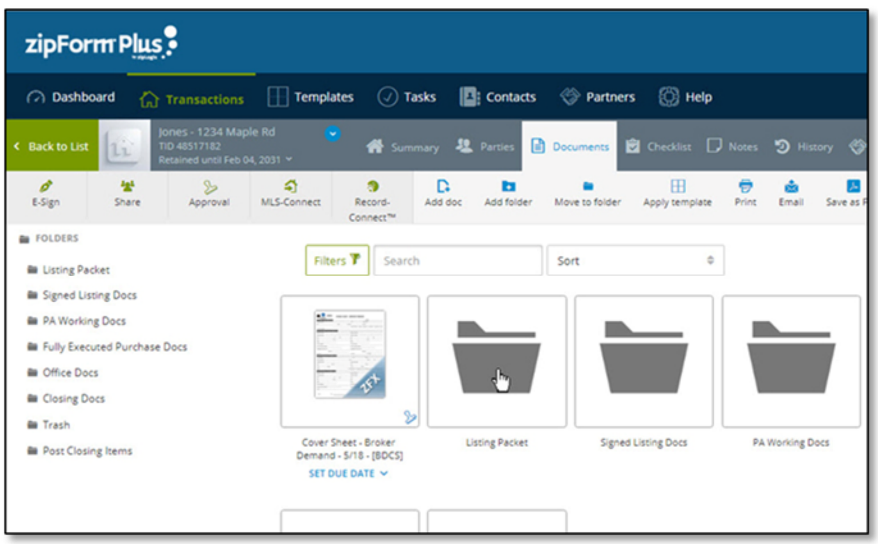
* **Selling Agent and Broker** and **Listing Agent & Broker** can be saved permanently in each of your own personal templates (Purchase and Listing) to avoid having to enter this information for each Transaction.

Prepare Listing Forms

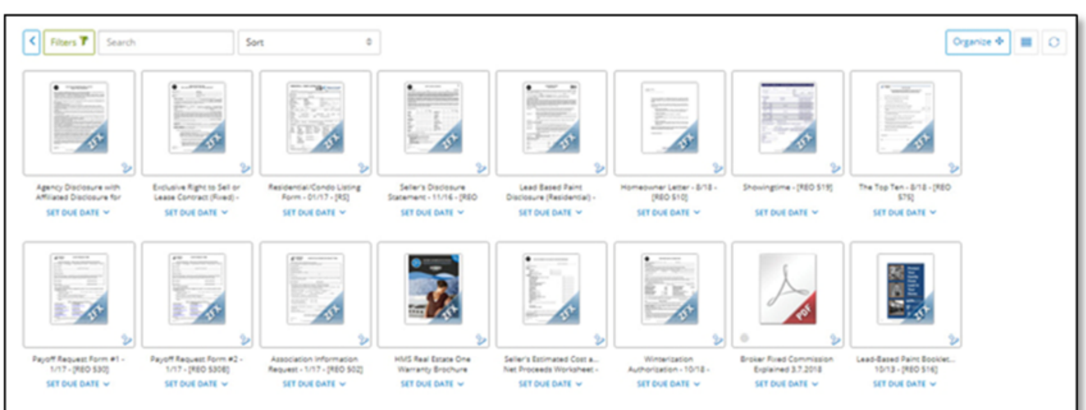
Select **Documents** to access your transaction's **Documents folder**.



Select the **Listing Packet** folder.



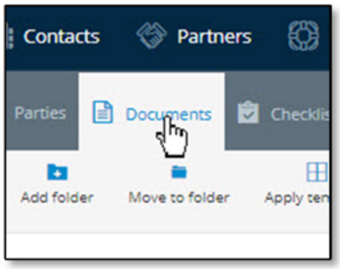
If you applied your office **Template** when you created this transaction all of your listing forms and folders were automatically added to your **Listing Packet folder**. If you did not apply a template, or you need to add additional forms that were not included in your office template, you will need to manually add the forms and folders to your transaction.

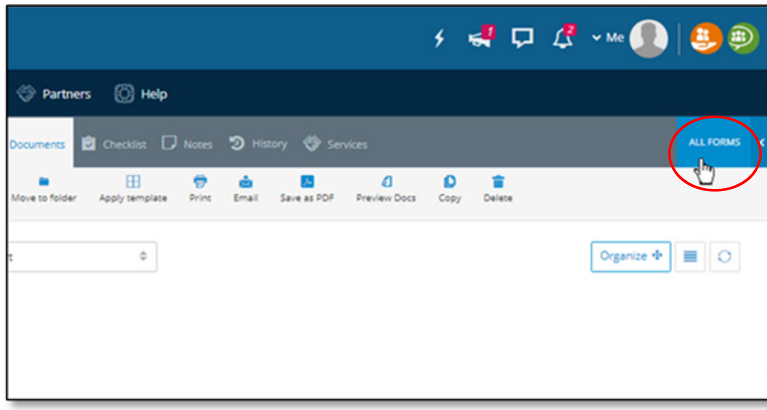


Manually add forms and folders

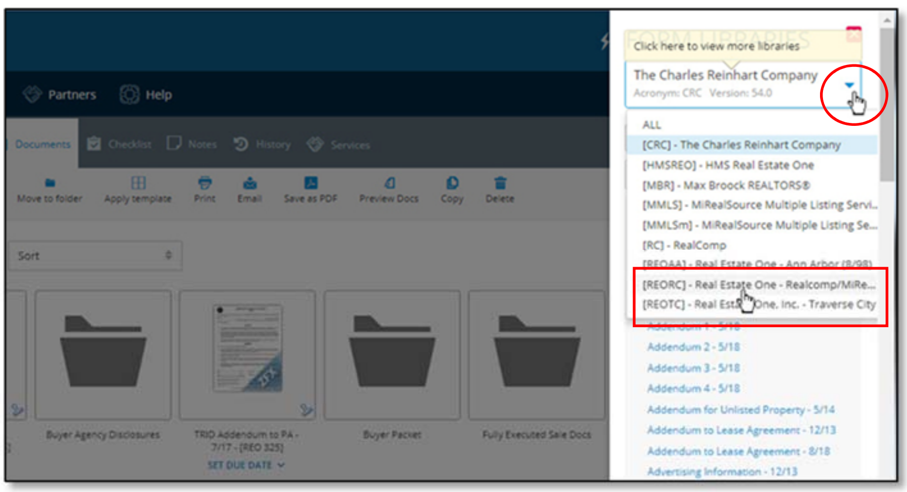
If you created your transaction using a template you can skip this section and continue on to the **Preparing Documents** section.

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

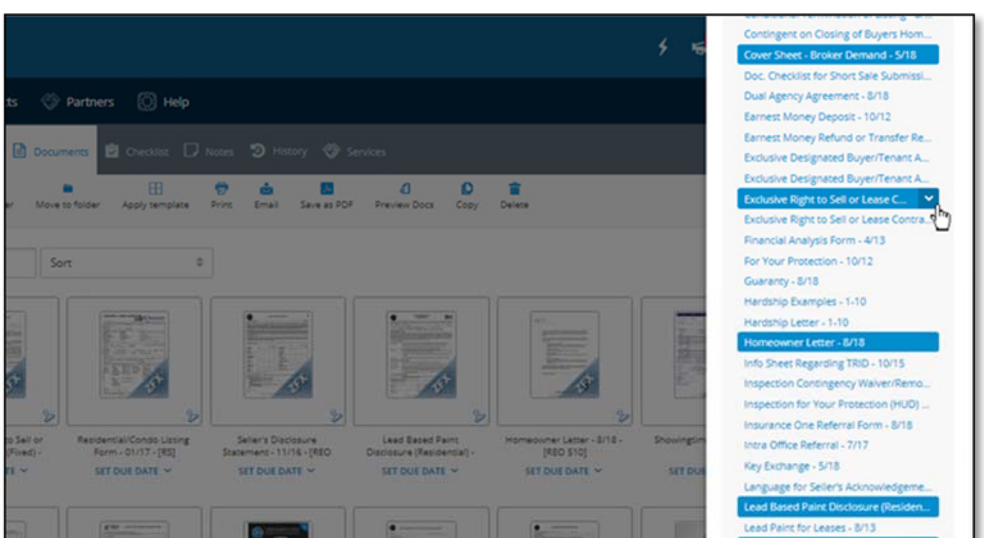




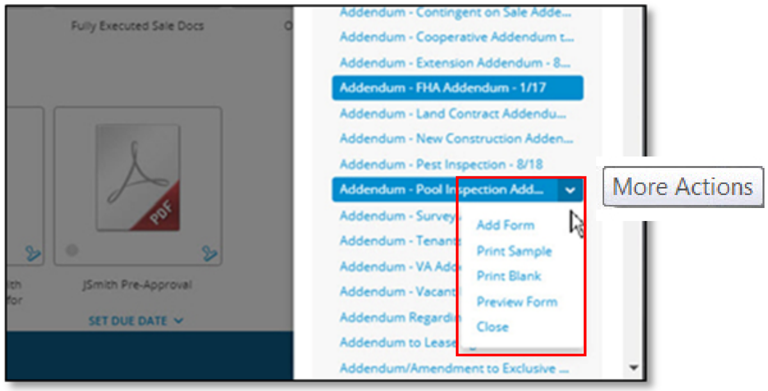
First select the **Form Library** that you would like to access.



Then choose the forms that you would like to add to your transaction from the list of forms in your chosen library. A single click will add the form to your transaction.

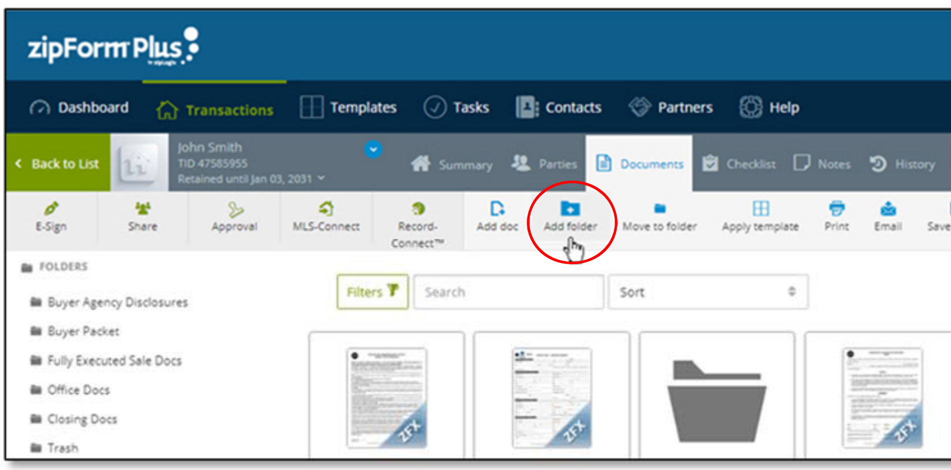


Each of the forms in the **Form Library** also allow you to access a **More Actions** menu that allows you to **Print a Sample** of the form, **Print a Blank** form and **Preview** the form.



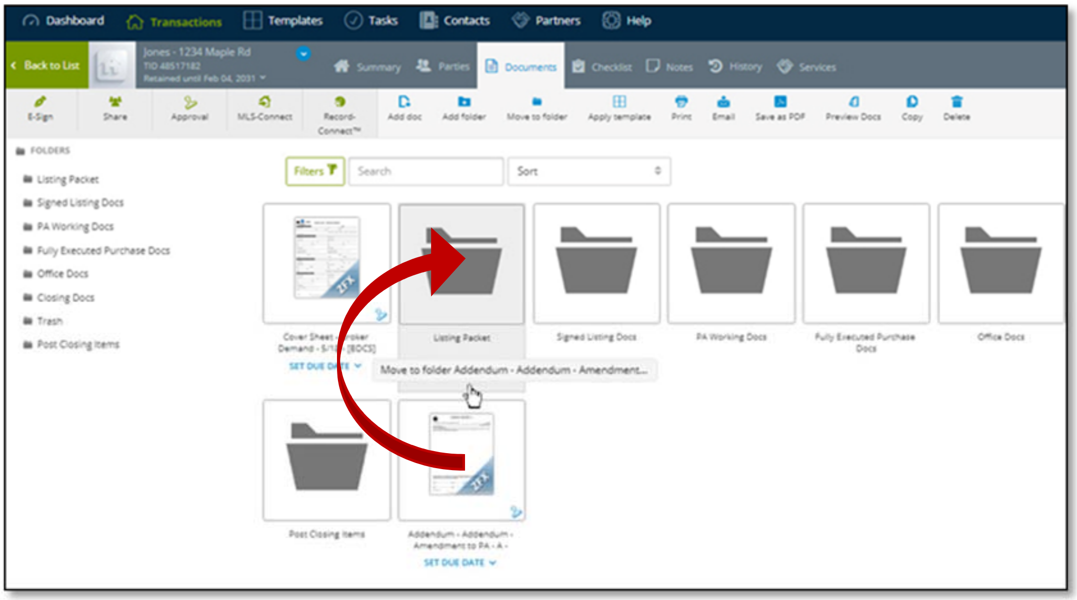
Once you have all of the forms manually added in to your transaction, you will need to manually add your folders also.

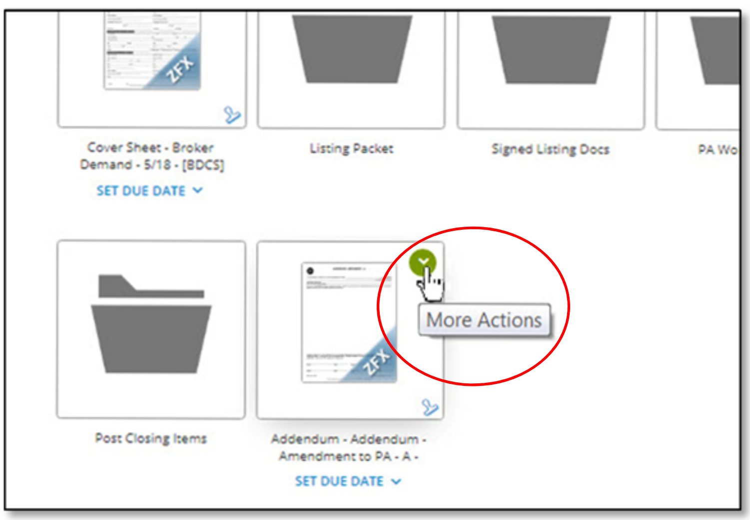
To manually add a folder to your **Documents folder**, choose **Add folder**.

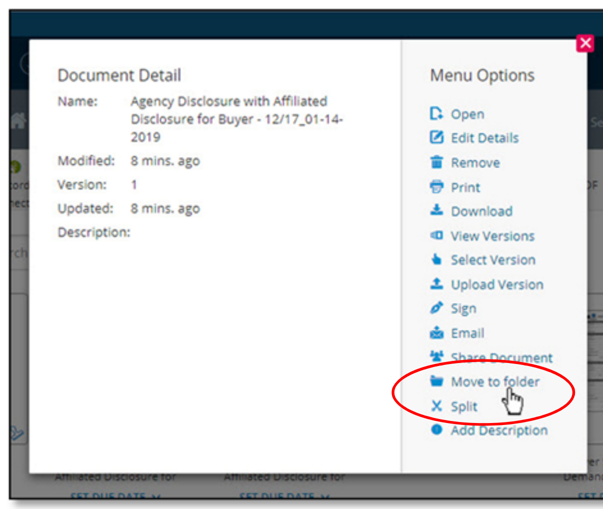


Give the folder a name. Use the name **Listing Packet** for all of your main listing documents.

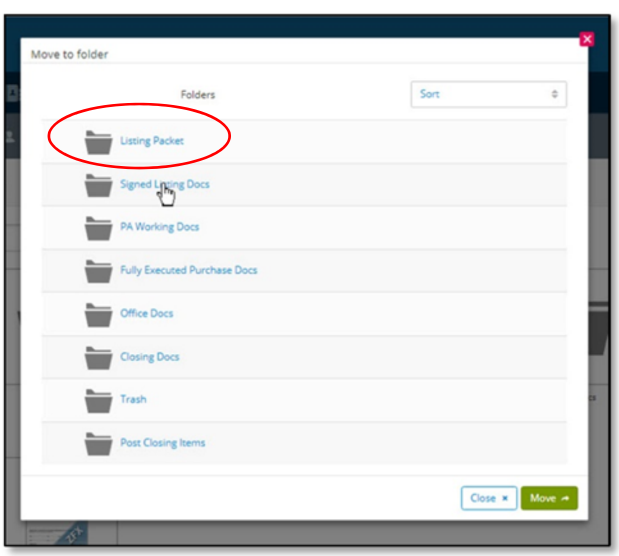
You can move your forms into folders by dragging and dropping them or by selecting the **More Actions** link on each document and choosing **Move to Folder** from the **Menu Options**.

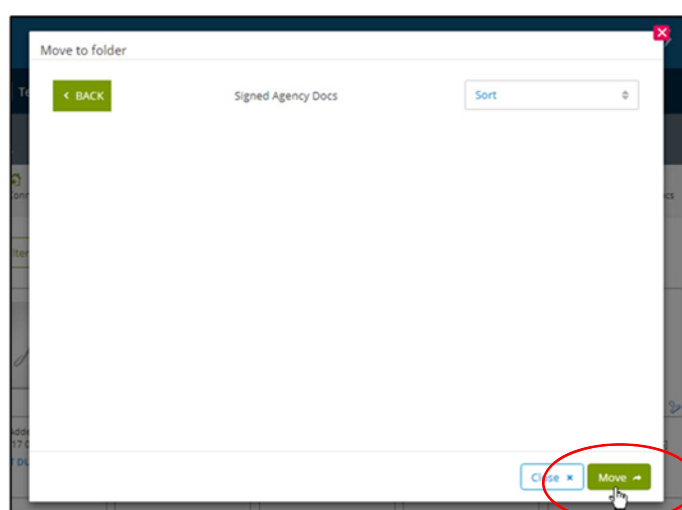






Select the folder that you'd like to move the document to and then choose **Move**.

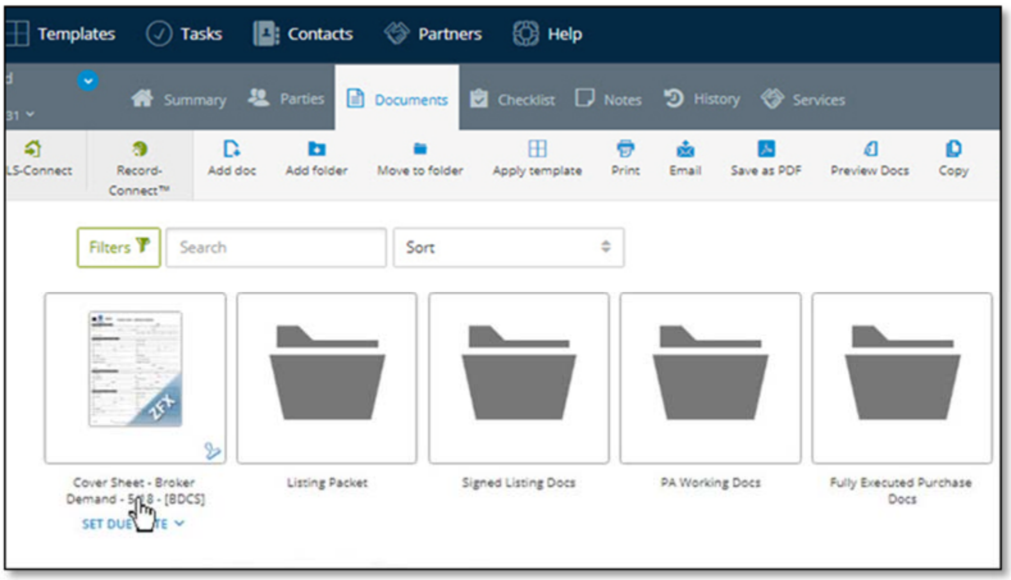




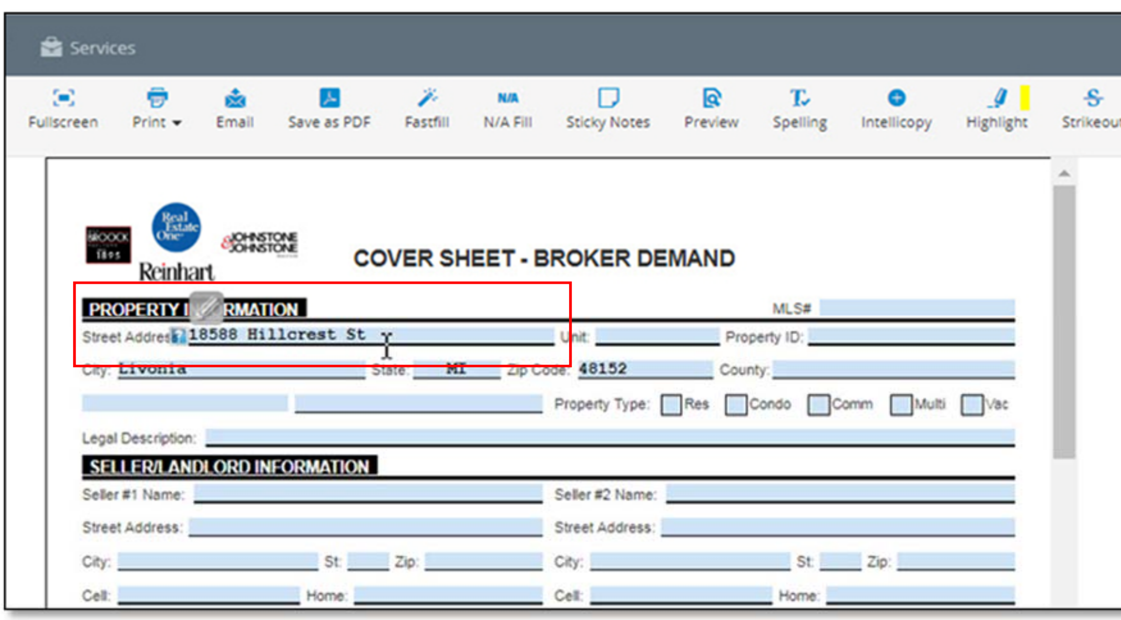
Preparing Documents

Once you have all of the forms that you need in your **Documents folder**, you are ready to enter the listing 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 **Exclusive Right To Sell** form, 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 Broker Demand** form, it will auto fill all of the other forms in your transaction. The **Cover Sheet** 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.

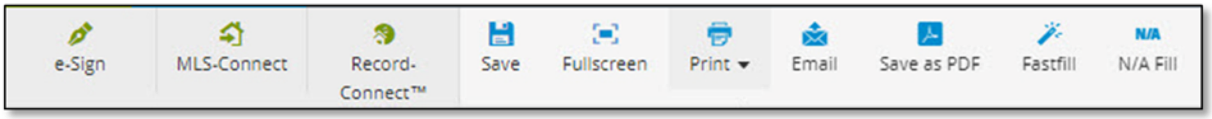
Open the **Cover Sheet Broker Demand** form and fill in the details of the Listing.



Enter all of your Listing 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.

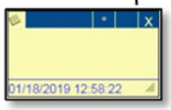
Save as PDF – allows you to save the currently open form as a PDF within the transaction or to your device.

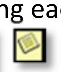
Fastfill – selecting this option temporarily removes all of the text / clauses from a form and only displays the form fields making it easier for you to fill in all of the form fields without the distraction of the rest of the form. The Fastfill icon changes to a viewer icon. Select the viewer icon to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

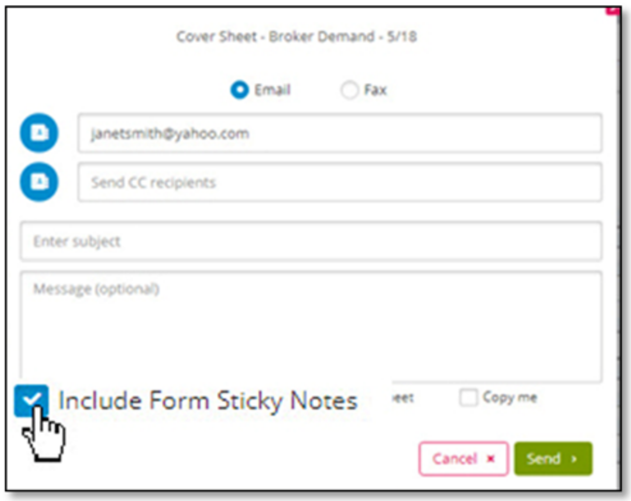
Continued on next page…

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.

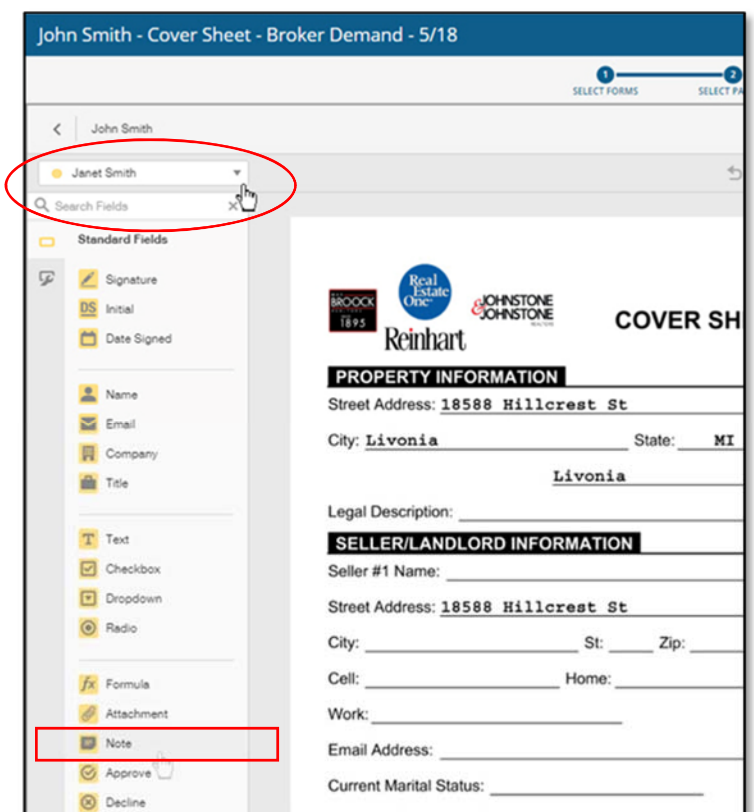




You can also choose to have a sticky note included in a form that is emailed to a client from zipTMS.



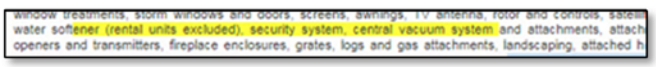
Sticky notes added in zipTMS are not included on forms that are sent to be digitally signed through Docusign but you can add notes directly to a form in **Docusign** instead and they will be included on the forms in a **Docusign signing package**.



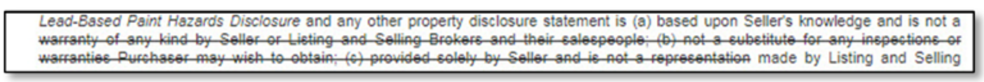
Preview – gives you a preview of how the completed form will look with all of the information that you have entered into the form fields. You can also Email, Print, Download or Submit the form for review from the preview.

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.

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.

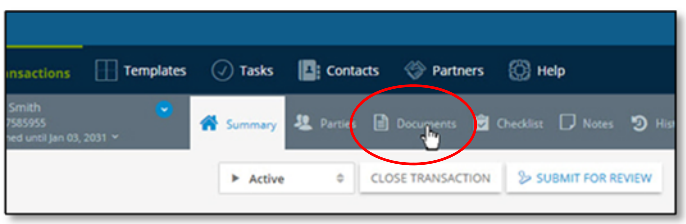
The Listing Packet folder should contain the following documents:

Agency Disclosure with Affiliated Business Arrangement Disclosure
Exclusive Right to Sell or Lease
Seller's Disclosure (note: all fields are required if sent via Docusign)
Lead Based Paint Disclosure & LBP Booklet
Data/Profile Sheet
Showing Instructions
Dear Homeowner Letter
Association Info Request (if applicable)
Payoff Requests (if applicable)
other docs required by listing circumstances or office

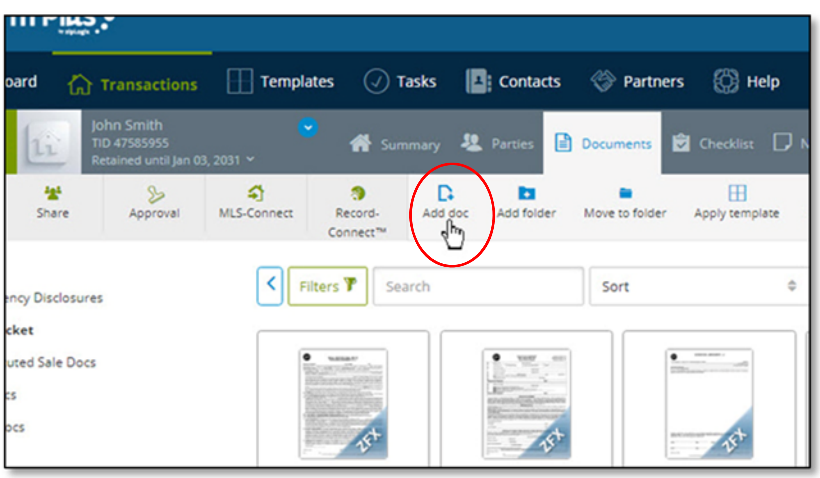
When you have finished filling in all of the information in the **Cover Sheet Broker Demand** form, open the **Listing Packet** and complete all of the other forms with the remaining form specific information that was not auto populated from the **Cover Sheet**.

If you need to add any additional documents to the transaction that are not already in zipTMS prior to sending out the transaction for signatures, you will need to upload them to your zipTMS **Documents folder**.

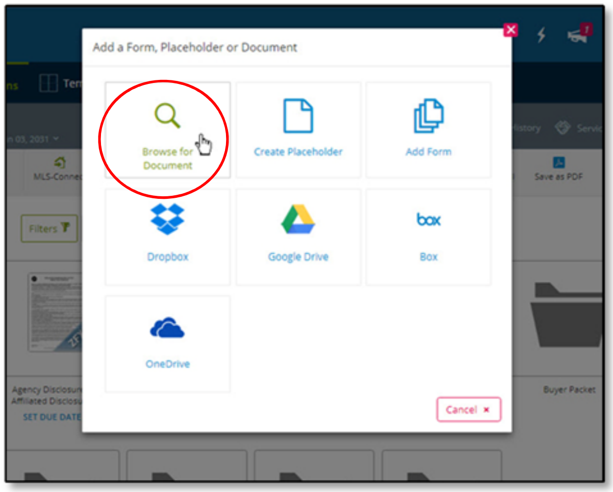
To add additional documents to your transaction, go to your transaction's **Documents Folder** by selecting **Documents**.



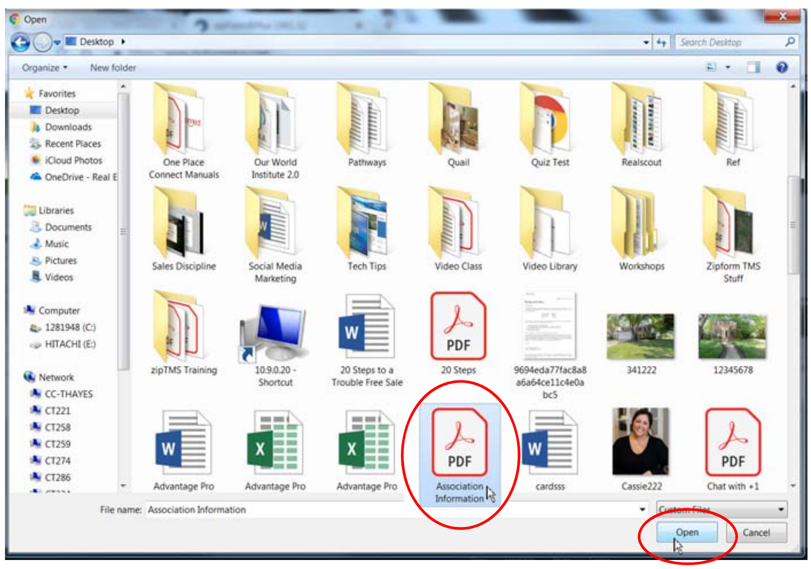
Choose **Add doc**.



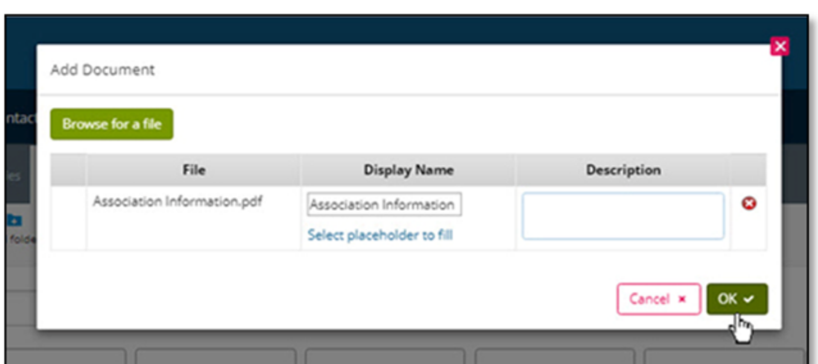
Choose **Browse for Document** if the document that you would like to add is stored on your computer or choose a cloud source if it is stored in your cloud storage.



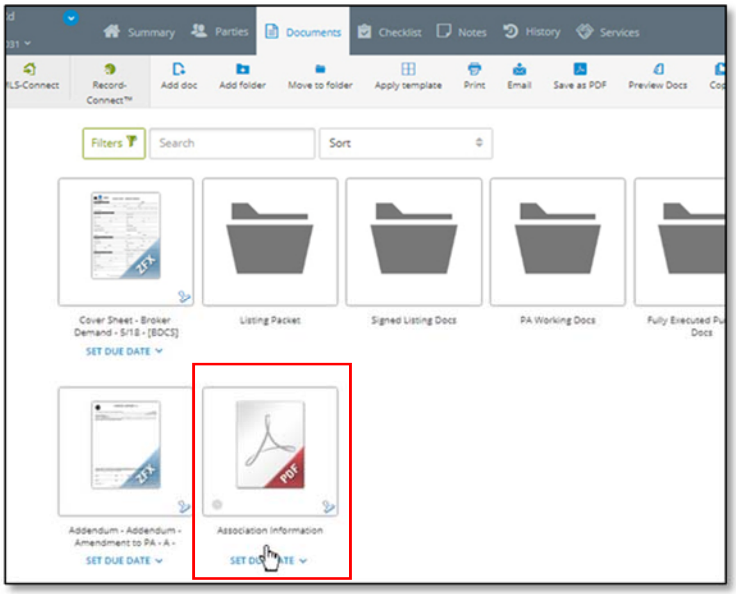
Select the document that you would like to add and choose **Open**.



Choose **OK**.



You should now see your uploaded document in your **Documents folder**. You can drag and drop it to add it to your **Listing Packet** or you can use the **Move to Folder** option.

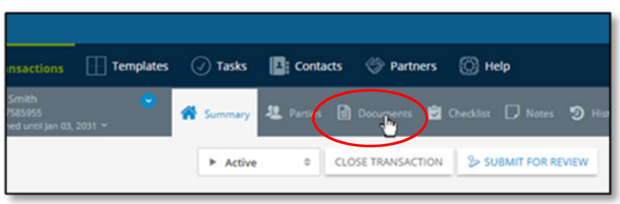


When all of your forms have been completed and you have added all additional documents to your transaction, you are ready to acquire signatures.

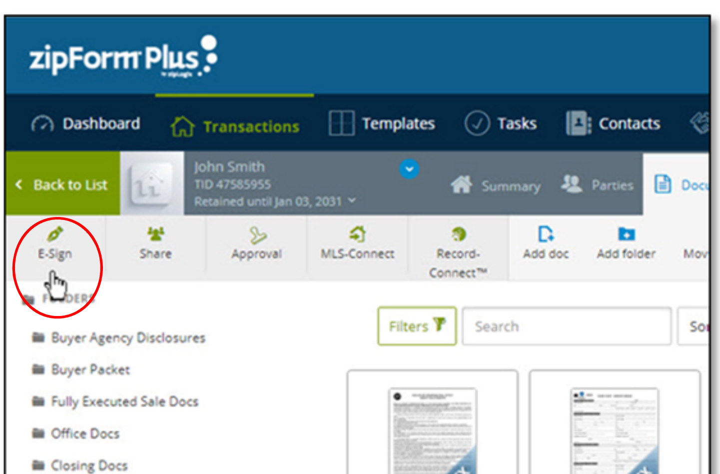
Obtain Digital or Ink Signatures

Digital Signatures Using Docusign

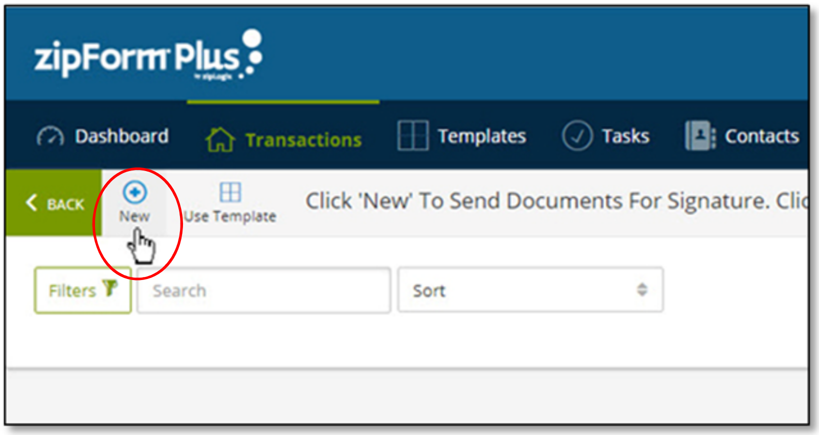
To send the forms to be digitally signed using **Docusign**, open your **Documents folder** by choosing **Documents**.



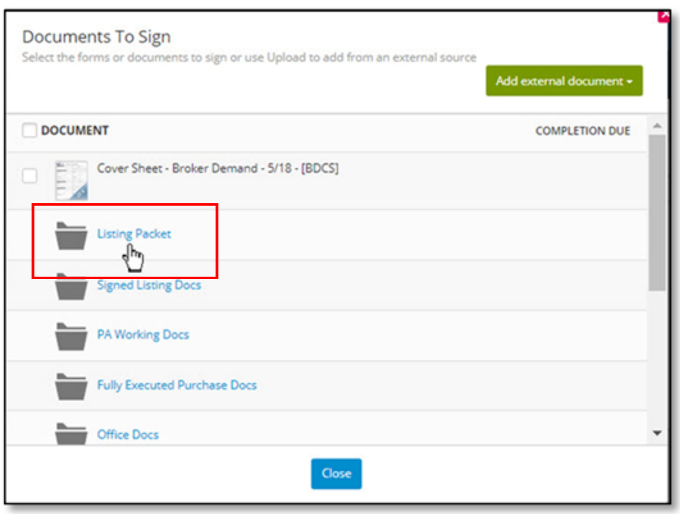
Choose **E-Sign**.

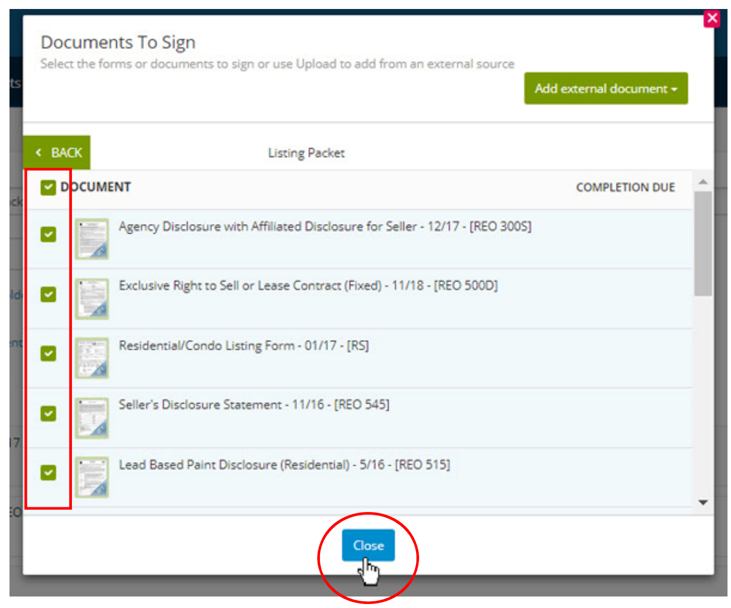


Choose **New**.

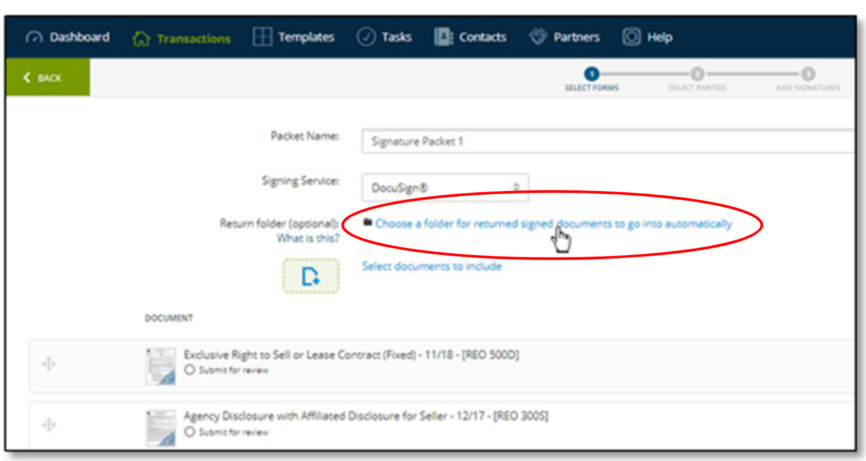


Select the documents that you would like to send to be digitally signed and choose **Close**.

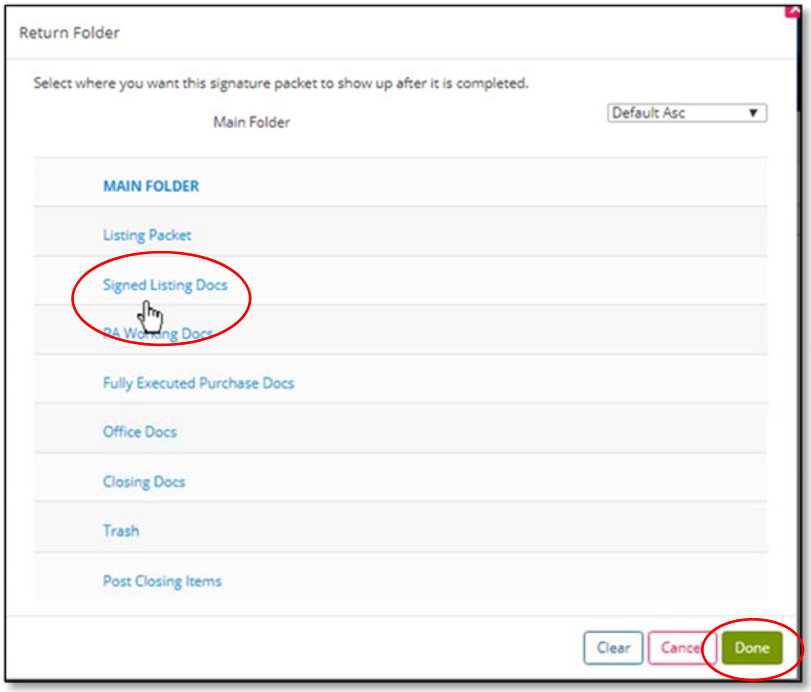




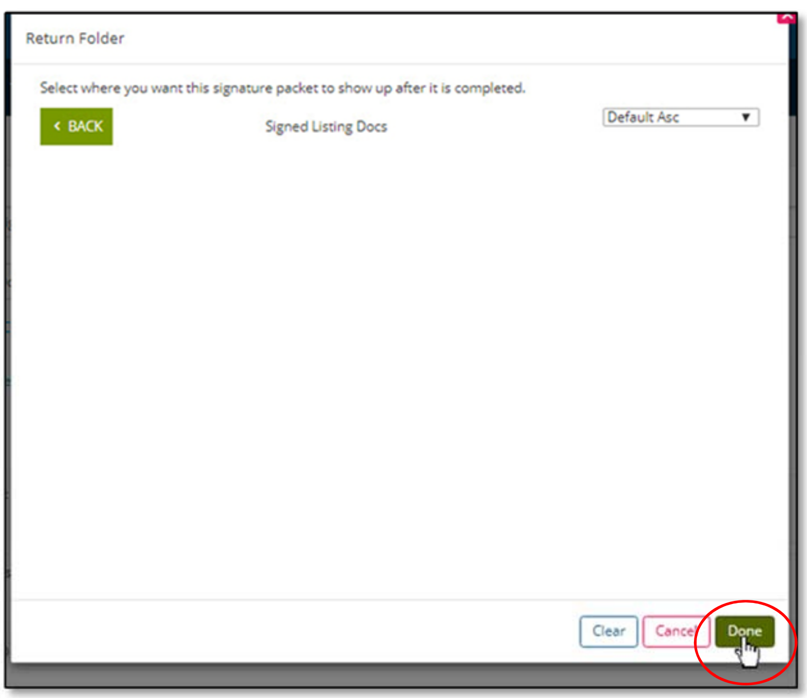
Choose the folder that you would like the forms to be placed in, when they return from being signed, by selecting the **Choose a folder for returned signed documents to go into automatically** link.



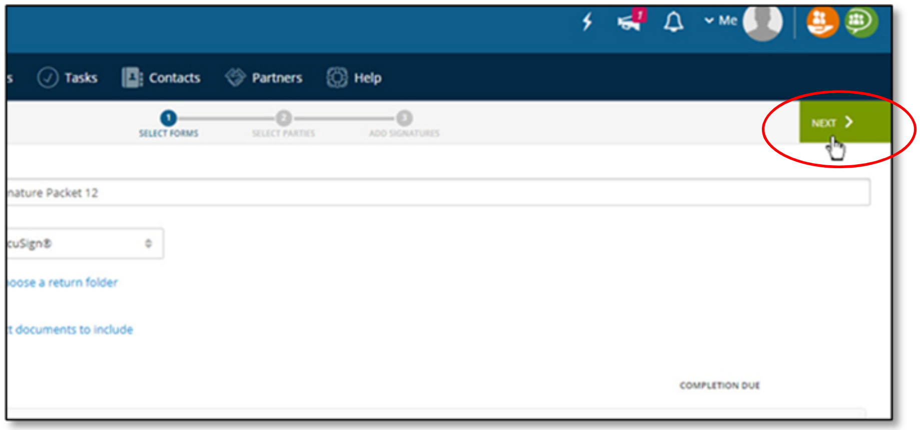
Select the **Signed Listing Docs** folder.



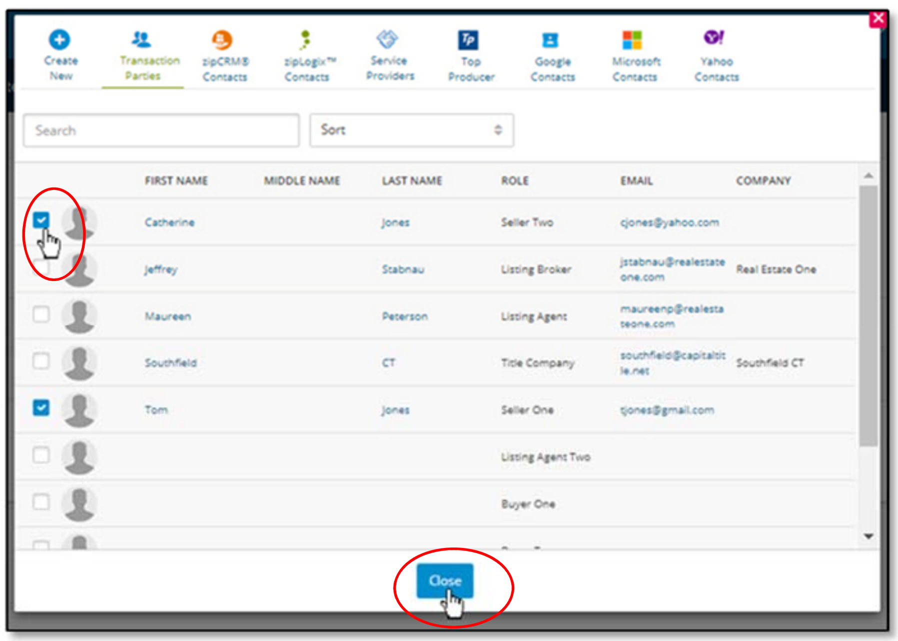
Choose **Done**.



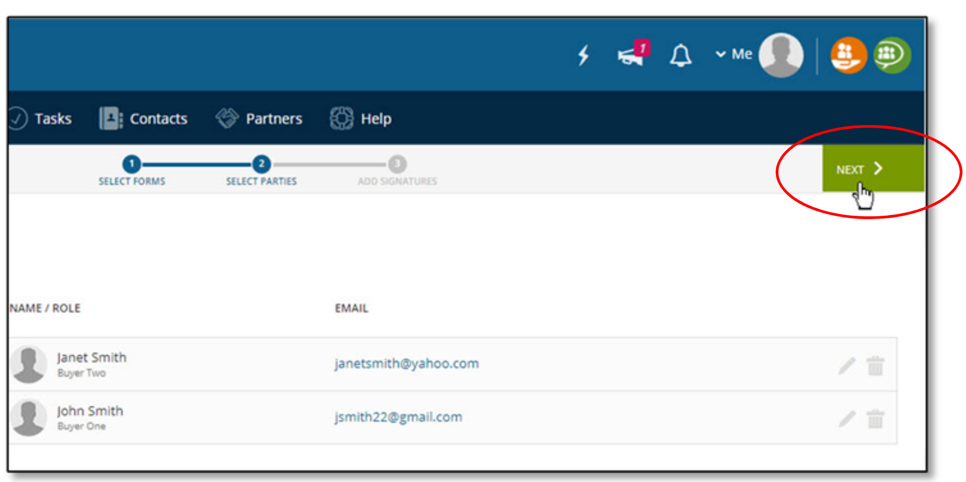
Choose **Next**.



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



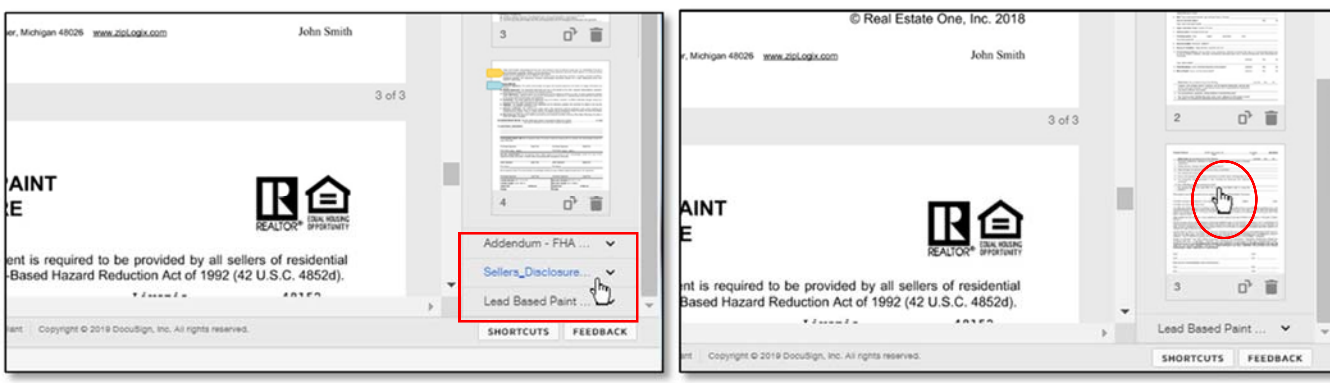
Choose **Next** again.



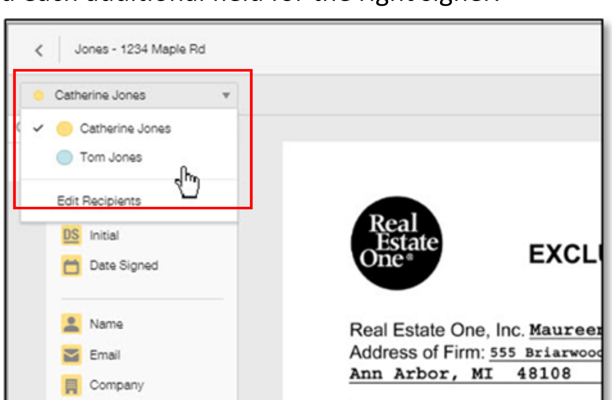
All of the forms that you selected load up into **Docusign**. All of your zipTMS forms will already have all of the signature and initial fields placed on them automatically. Do a quick check to make sure that all signature and initial fields have been placed correctly.

Any additional documents that you loaded up to your transaction from outside of zipTMS and included in the Docusign signing will not have the signature and initial fields in place on them automatically and you will have to add them in manually. Only zipTMS forms load up with these fields already in place. You can scroll down using the secondary scroll bar to see all of your forms.

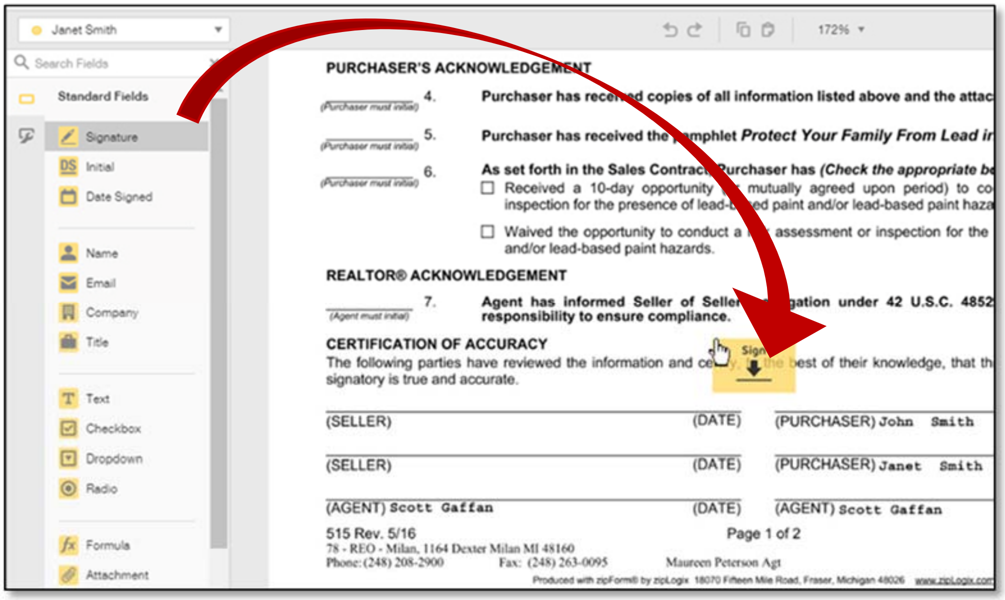
You can also select the page you would like to view from the side bar also. Expand the form on the sidebar by selecting it and then select the page you would like to jump to.



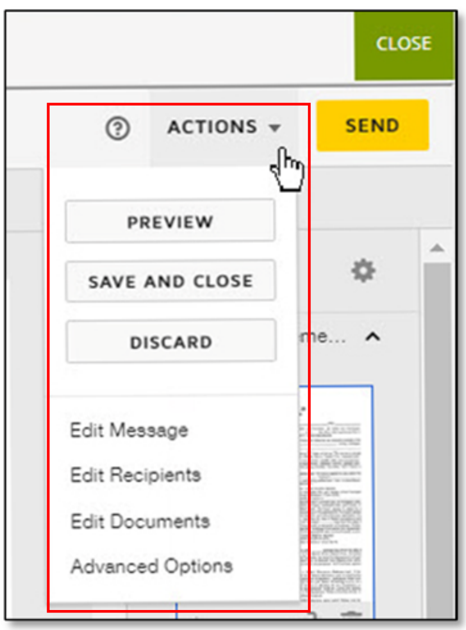
If you need to add additional signature and initial fields to a form, you first need to select the signer from the dropdown menu (located at the top left side of the window) that you would like to add the signatures and initial fields for. Each signer's name is color coded and all of the modifiers that 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 additional field for the right signer.

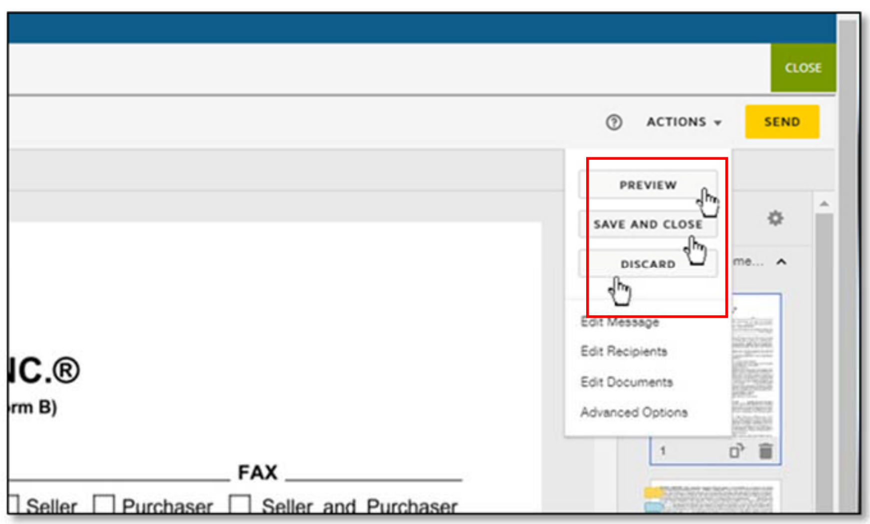


With the correct signer selected in the dropdown menu, drag and drop all of the initial and signature fields on to the forms in all of the places that they need to be for that signer. Then switch signers and do the same for the second signer. You only have to manually place fields on forms that were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

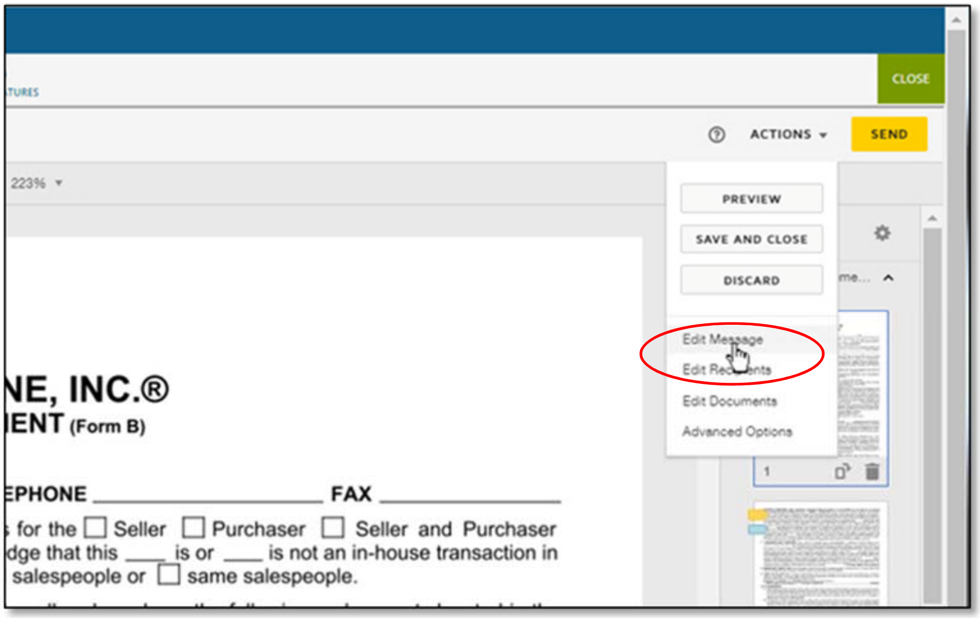


You can access additional options in the **Actions menu**. You can choose to **Preview**, **Save and Close** (saves as a draft in Docusign) or **Discard** (deletes the **Docusign** envelope) the digital signing envelope.

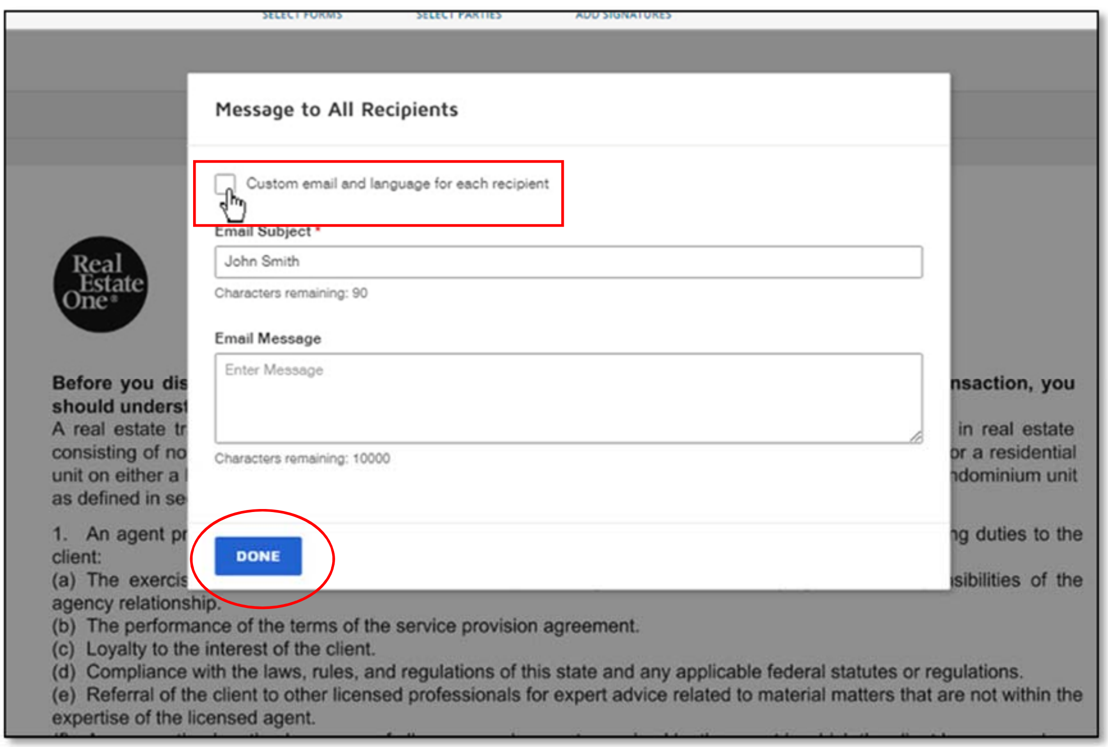




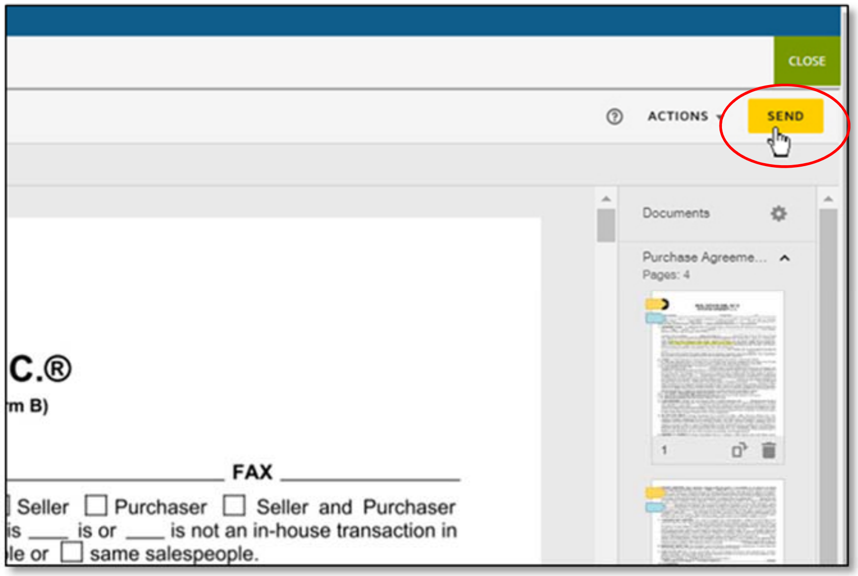
If you'd like to include a message to the recipients that will be sent along with the forms to be signed, choose **Edit Message** from the **Actions** menu.



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 then choose **Done**.



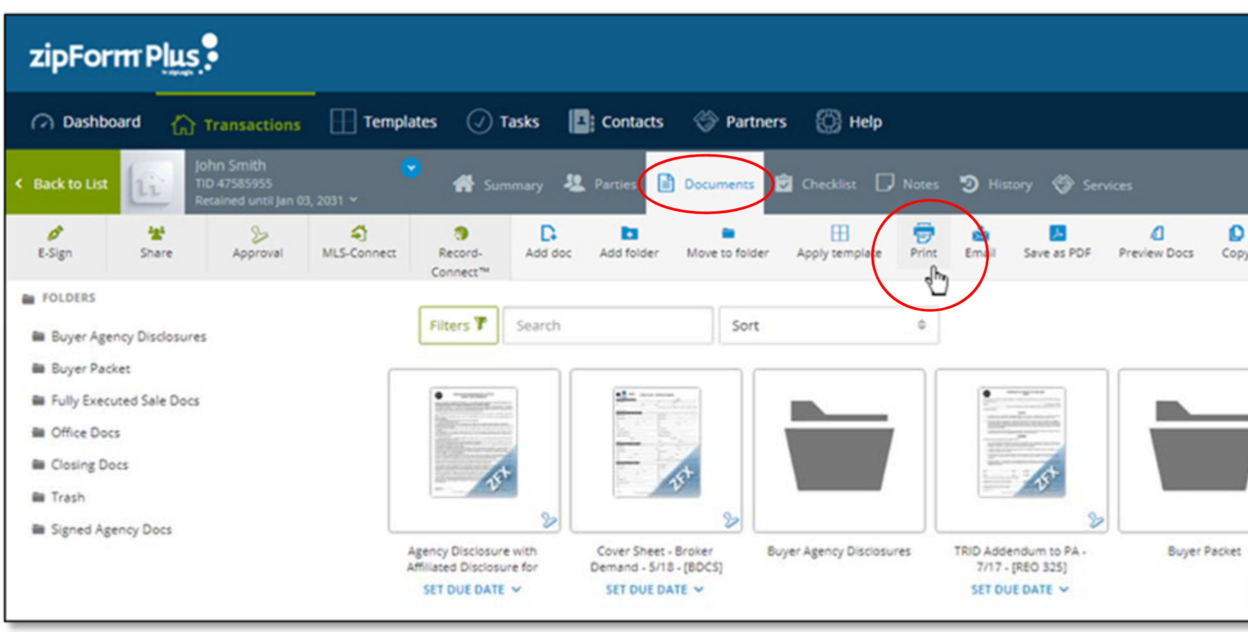
Do a final last minute check of all of the attached documents and when you're finished your review and you've added your custom messages, choose **Send**.



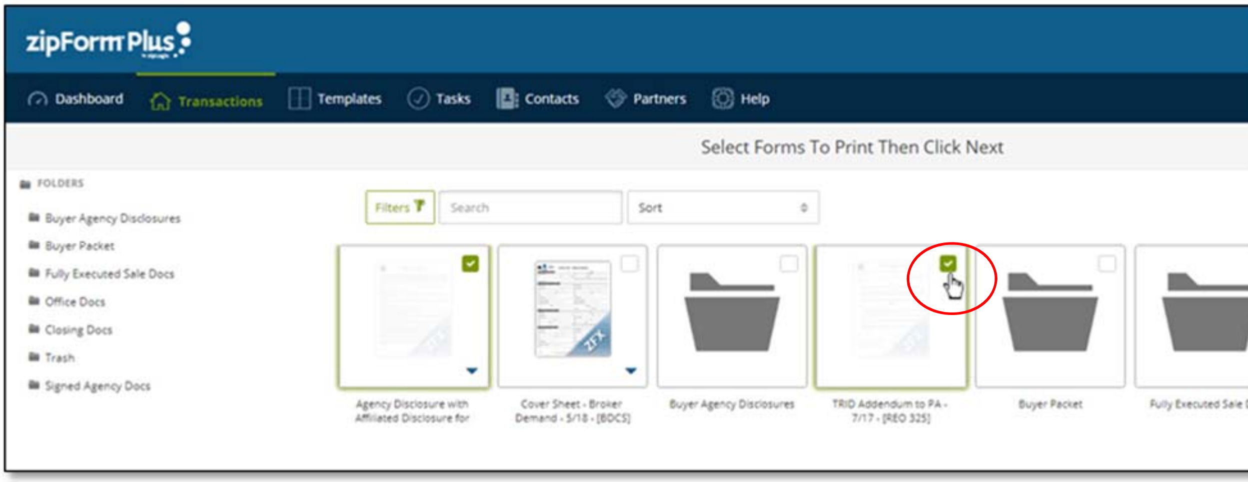
You will be emailed a copy of each of the digitally signed documents that you sent to your sellers via **DocuSign**. A copy of all of the signed documents will also be placed in the zipTMS folder that you selected as your **Return Folder**, your **Signed Listing Docs folder**. The placeholders for signed listing documents will automatically be filled if you selected the **Signed Listings Docs folder** as your return folder.

Ink Signatures

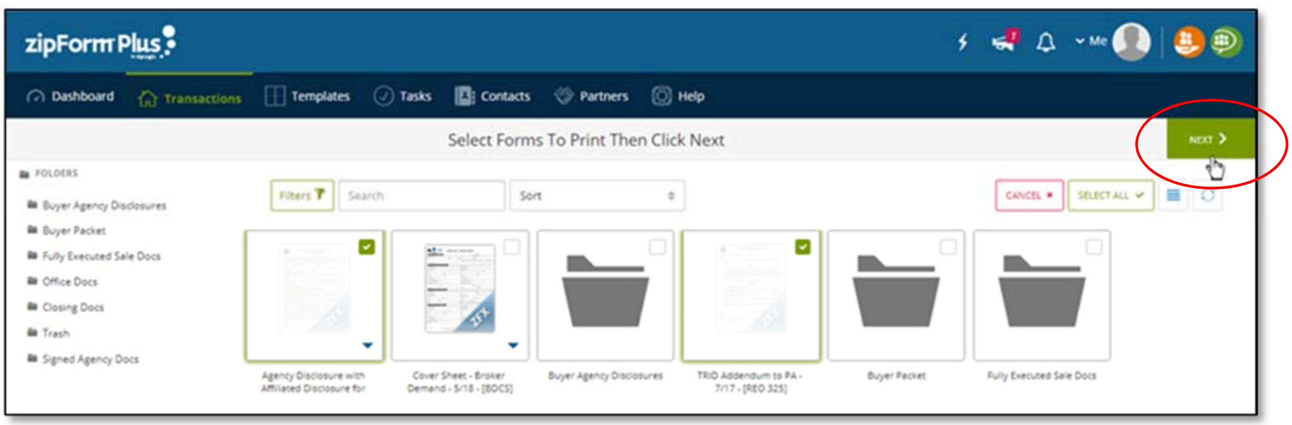
To obtain ink signatures, you will need to print your completed forms. From the **Documents** folder of your transaction, choose **Print**.



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

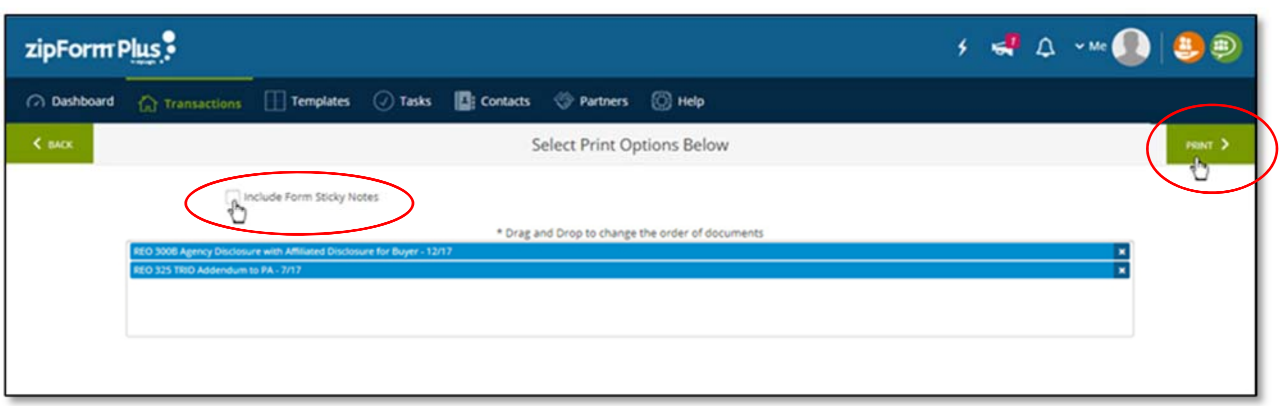


Choose **Next**.

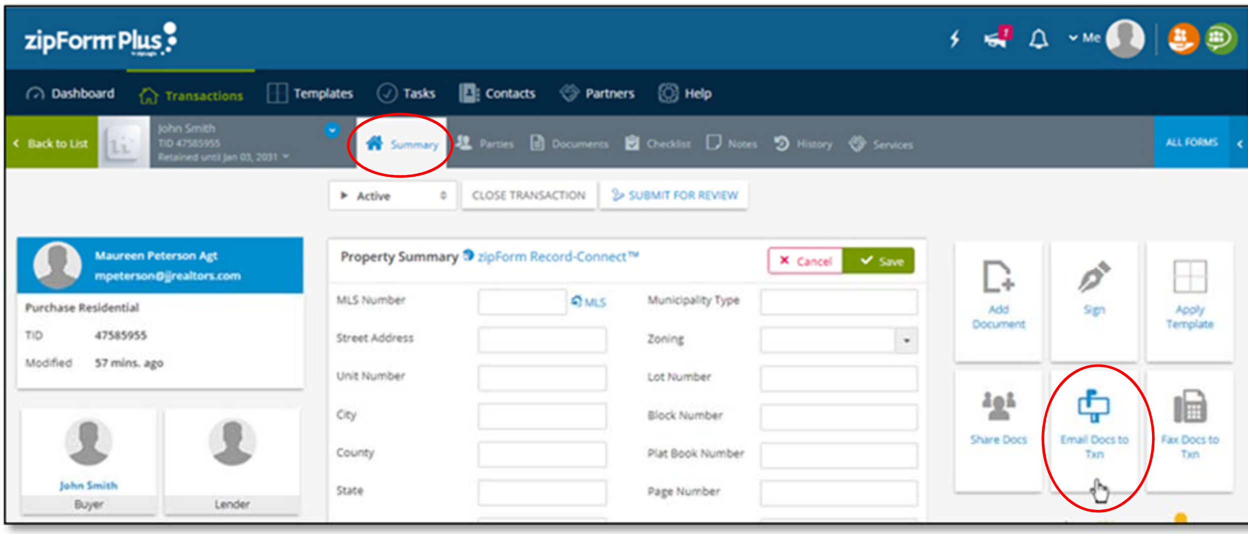


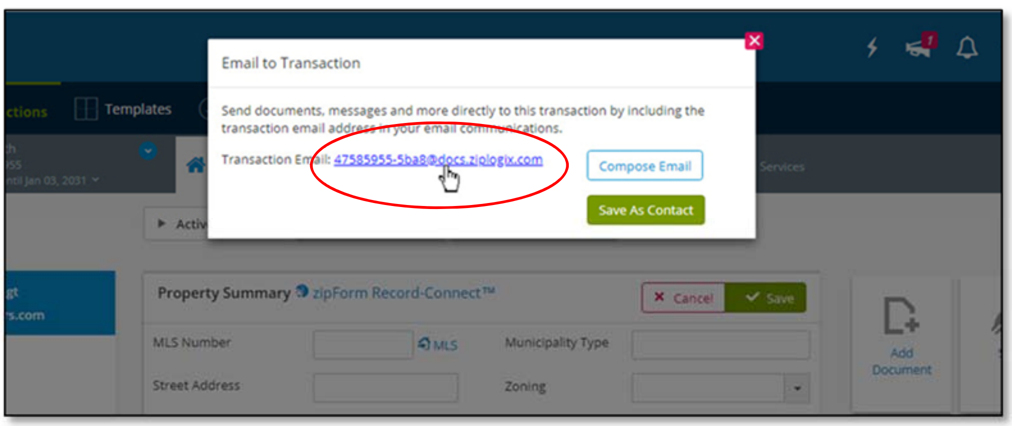
If you'd like to include **Form Sticky Notes** on your printed forms, check the check box before choosing **Print**.

Choose **Print**.

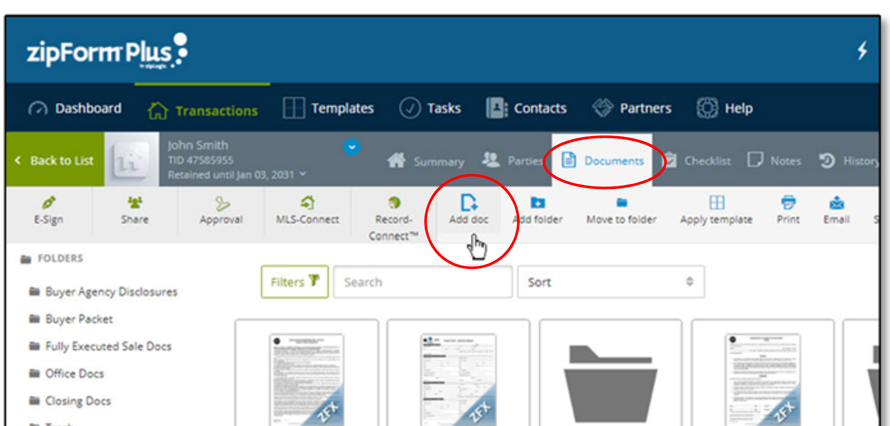


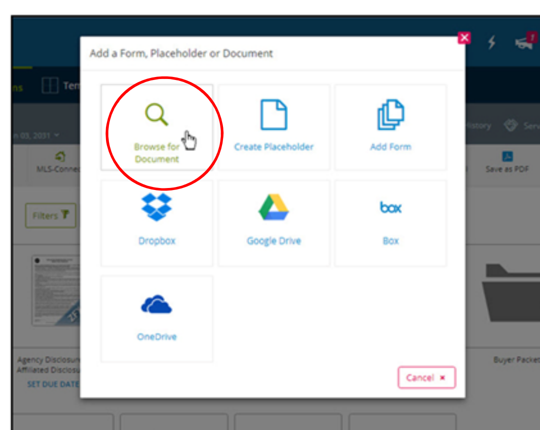
Once you have obtained ink signatures on all of your printed documents, scan all of the signed documents. Send the scanned documents to your email address. You can forward on the email that you receive from your scanner directly to your zipTMS transaction using the **Transaction's Email Address**. All of your zipTMS transactions have their own unique **Transaction Email Address**. To access a **Transaction's Email address**, select **Email Docs to Txn** from the **Summary** page of the transaction. Documents emailed directly to a transaction as email attachments will automatically be placed in your transactions **Documents folder**.





If you saved your scanned documents to your computer instead of emailing them directly to your transaction, you can choose **Add doc** from your transaction's **Documents** folder and upload your signed documents from your computer or from a cloud storage folder.

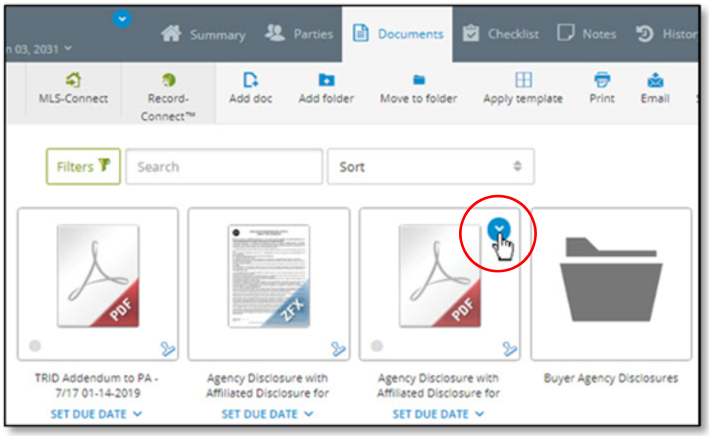


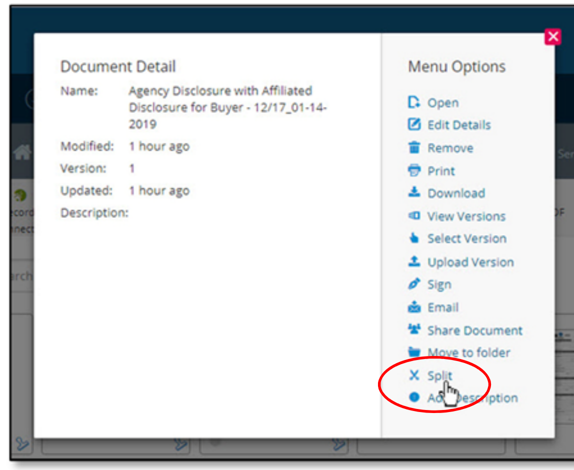


If you scanned all of your forms together and created a single PDF from all of the individual forms, you will need to split your PDF back into individual forms using the **zipTMS Split PDF tool**.

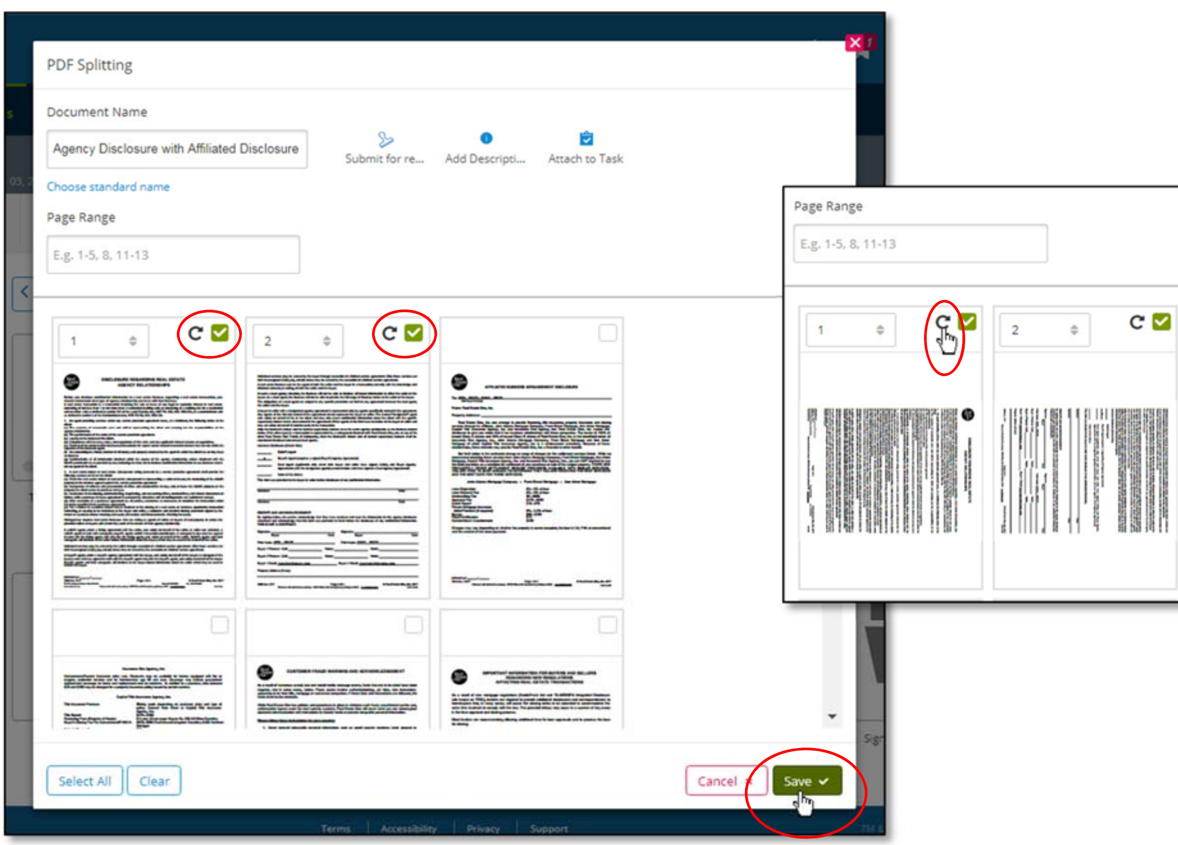
Splitting a multi-page PDF

You can split a multi-page PDF back into individual PDF files by selecting the **More Actions** link on the document and choosing **Split** from the **Menu Options**.

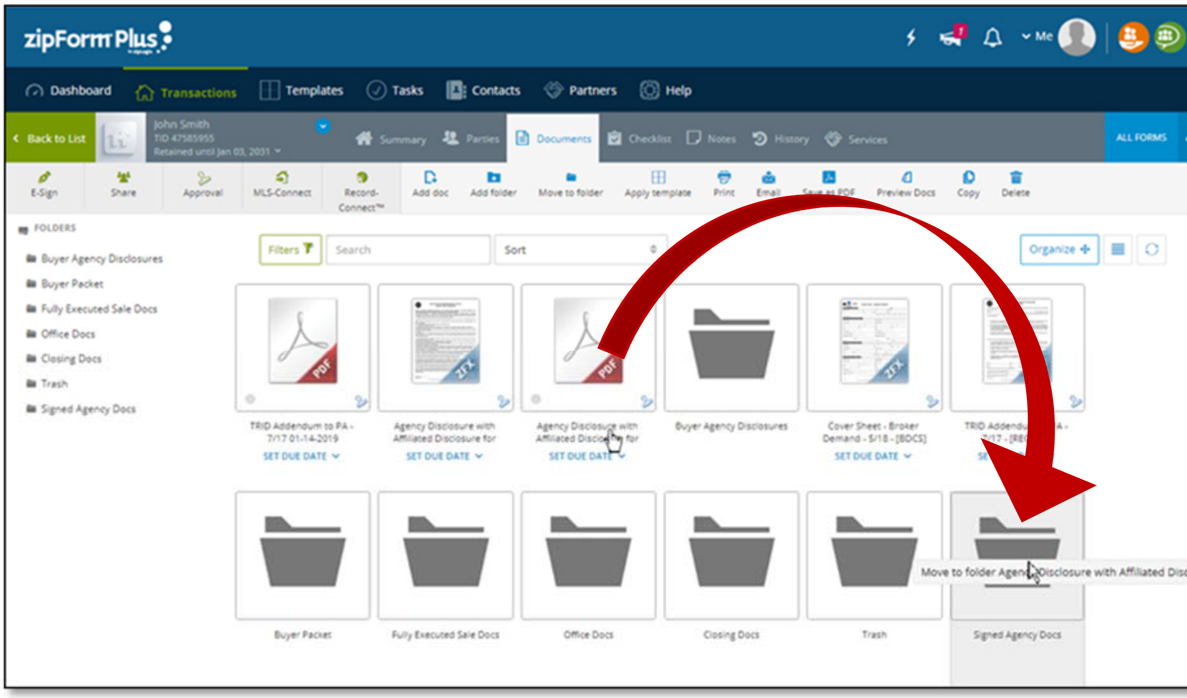




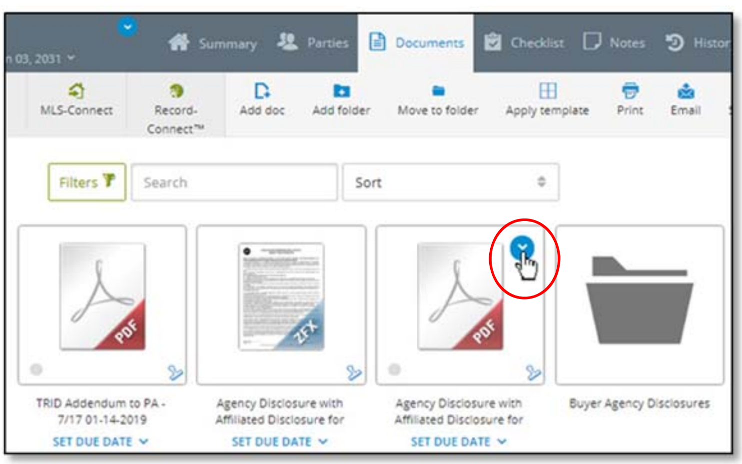
Select the pages that you'd like to split into a new PDF. You can also rotate pages by selecting the rotate icon on each page. Select the **Choose Standard Name** drop down menu to be sure that you are naming your split forms correctly or they will not match up with the document placeholders. Choose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

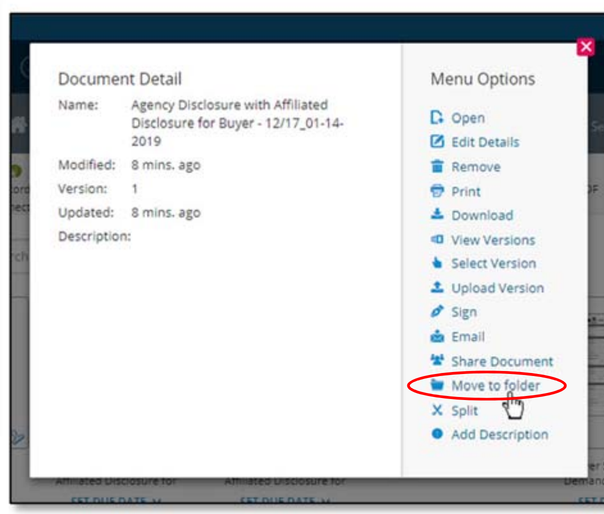


Once you have all of your signed and scanned documents loaded up to your transaction's **Documents folder**, you can move them to your **Signed Listing Docs** folder. You can drag and drop the documents onto the **Signed Listing Docs** folder.



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

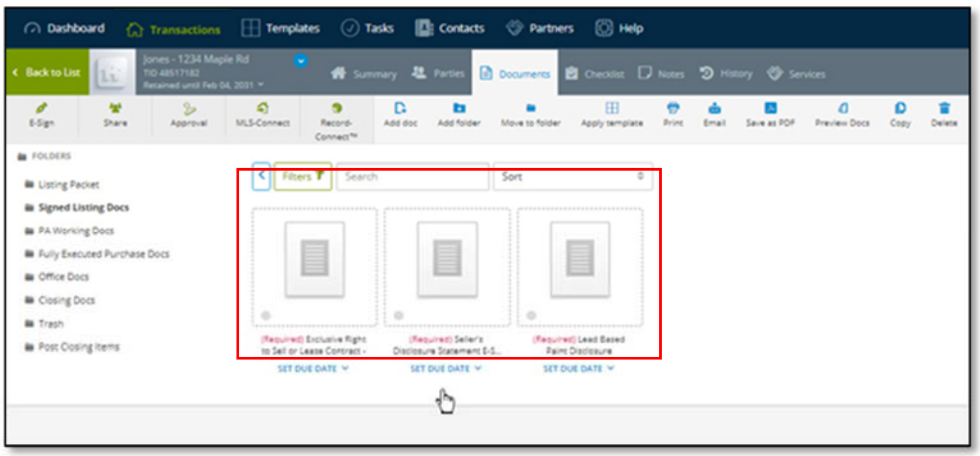


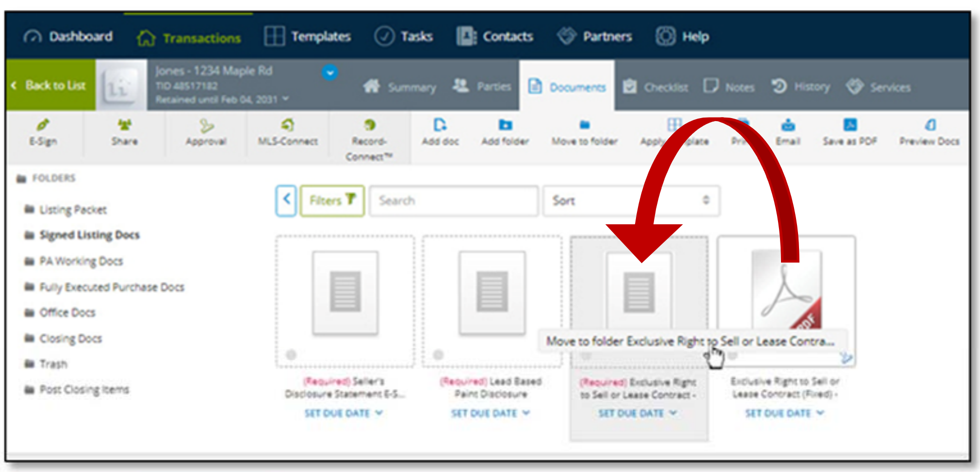


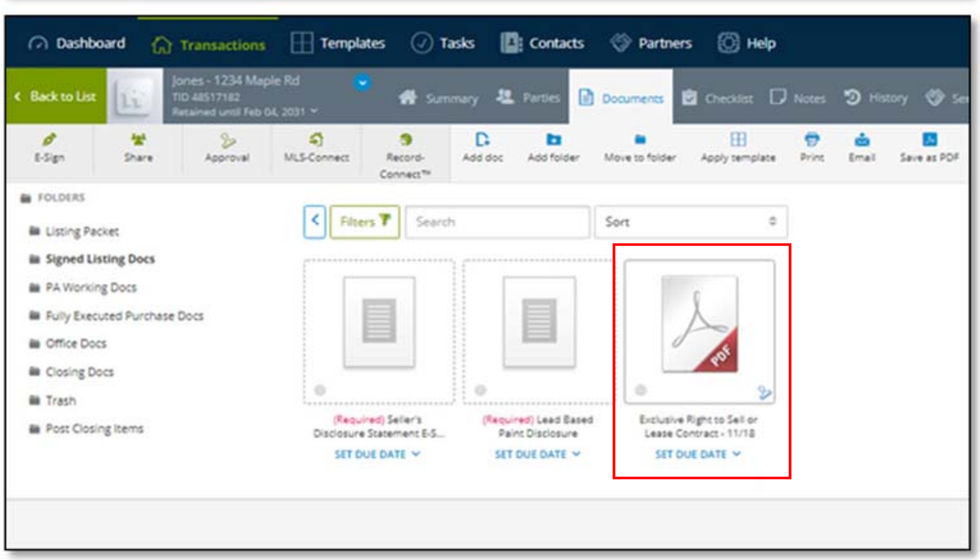
Placeholders

Document placeholders were added to your **Signed Listing 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. M**anually** 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.





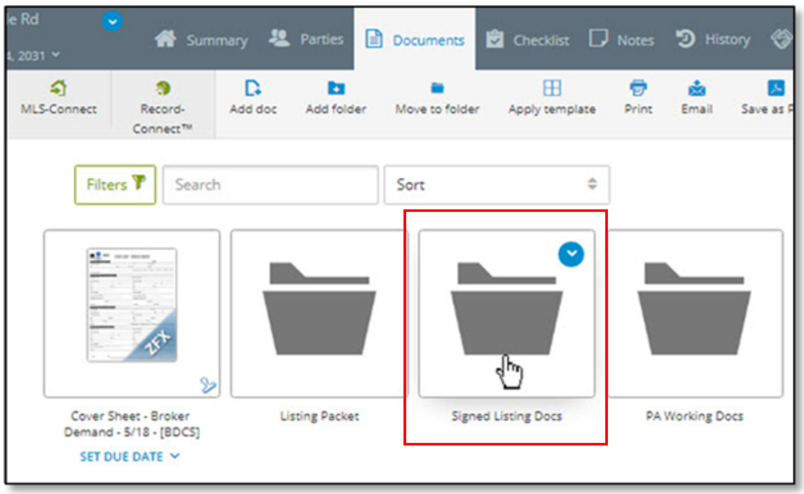


Enter the listing into the MLS with photos and attach disclosures.

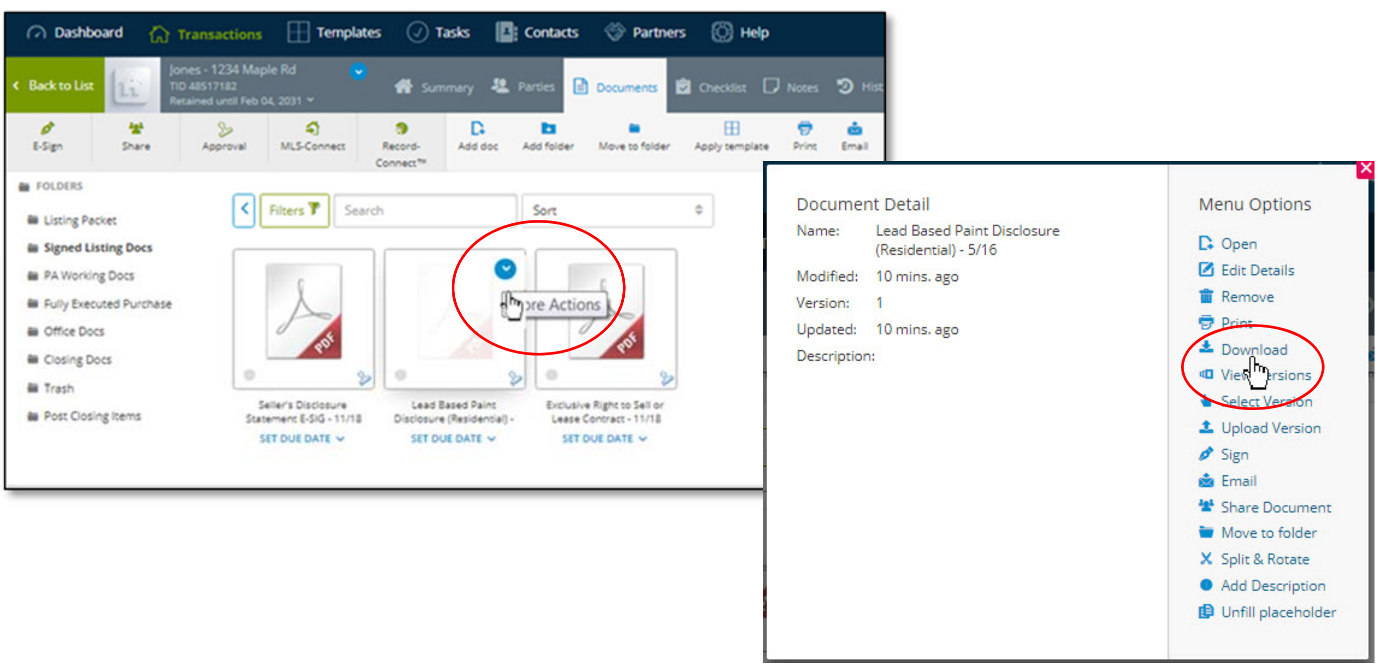
Download Disclosures

You will need to save a copy of your fully executed Lead Based Paint Disclosure and Sellers Disclosure Statement to your computer so you can upload it to your MLS, Showing Desk etc. and to make it accessible for you to easily send it to someone upon requested.

Open your **Signed Listing Docs folder**.



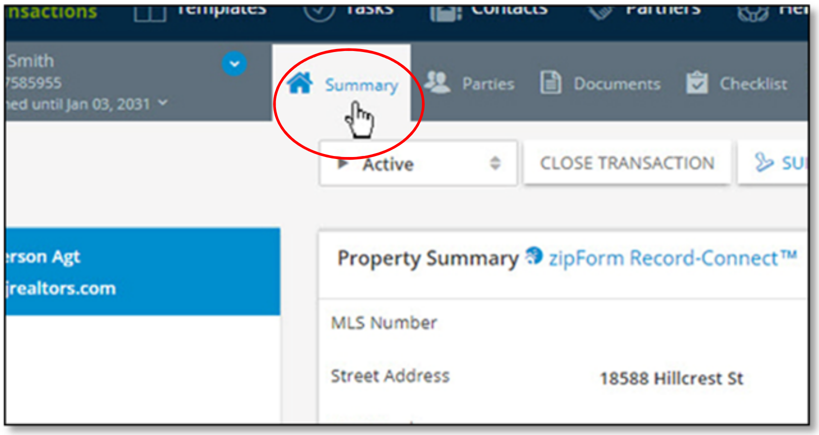
Open the document's **More Actions menu** and choose **Download** from the **Menu options**. Do this for each disclosure individually.



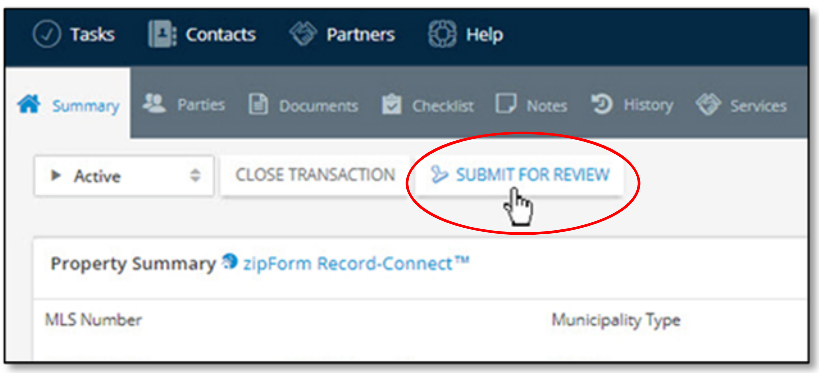
Submit for Review

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

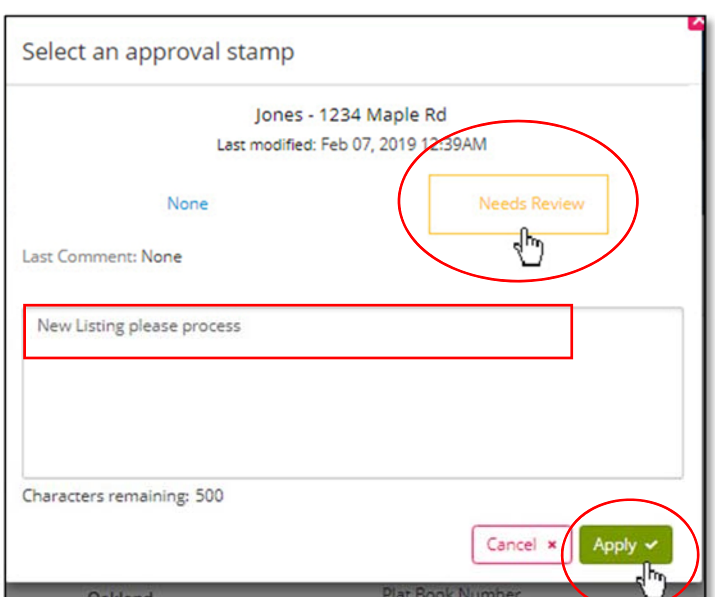
Return to the **Summary** page of your transaction by selecting **Summary**.



Choose **Submit For Review**.



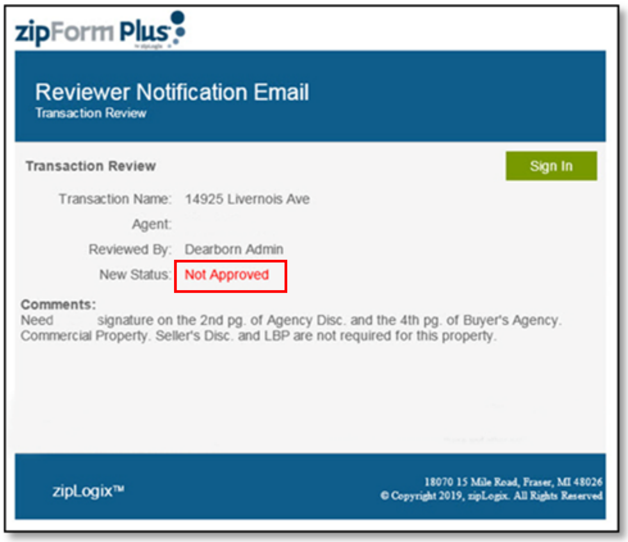
Add a comment to notify your office administrator what is being submitted - **New Listing please process**. Choose **Needs Review** and then **Apply** to submit your transaction for review.

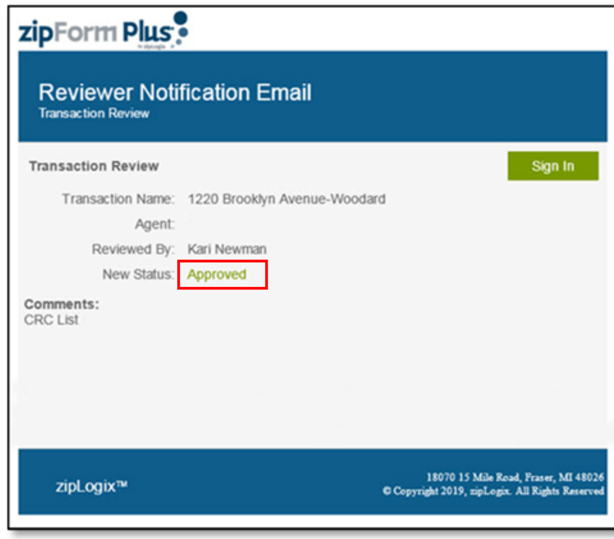


Your office administrator will review your transaction. You will receive a notification when the review has been completed.

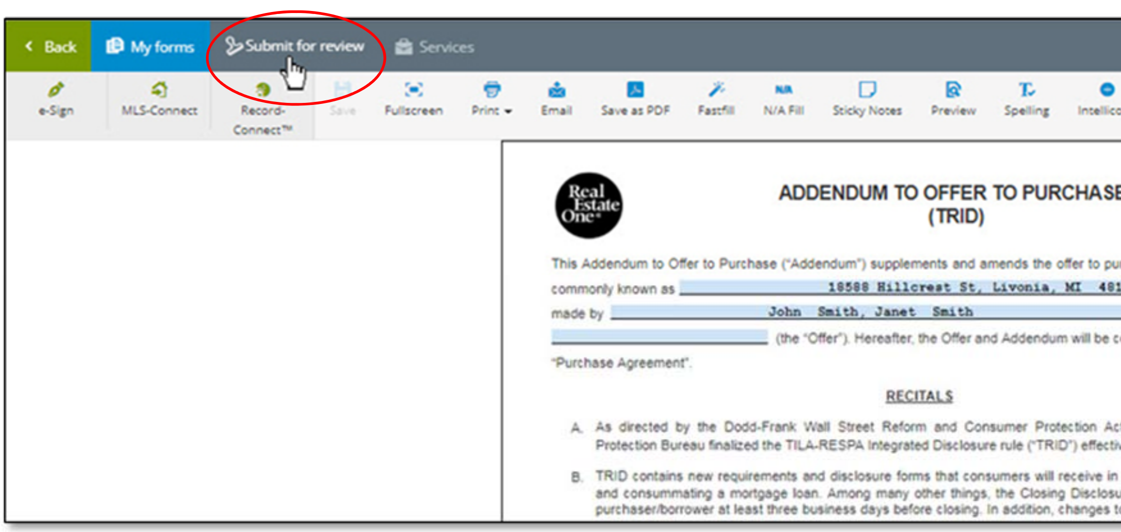
If it is determined that your transaction is missing something, you will receive a notification with the status of **Not Approved** with comments from your office administrator regarding what remains to be done to get the transaction approved.

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



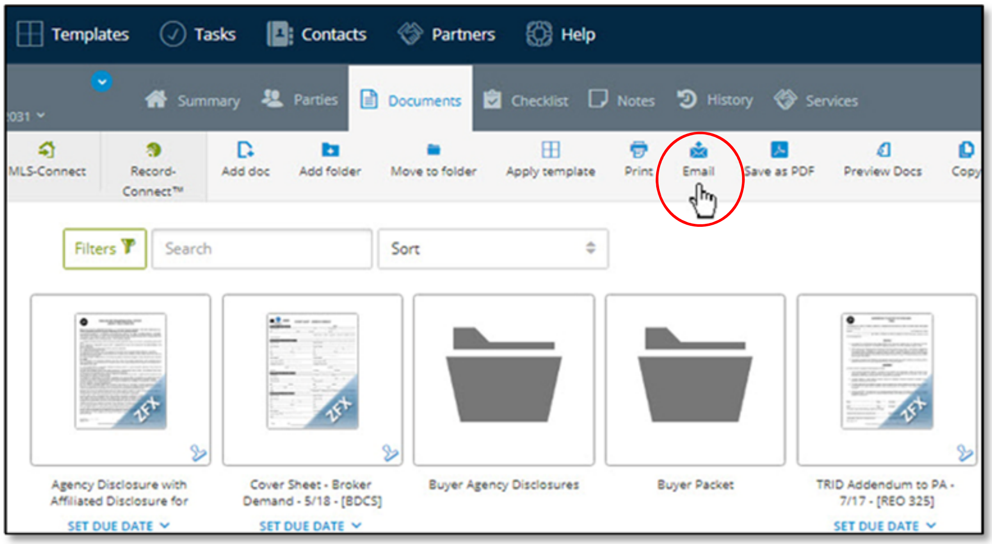


If your transaction was not approved, fix the issue and submit the transaction or the individual document back through for review again.

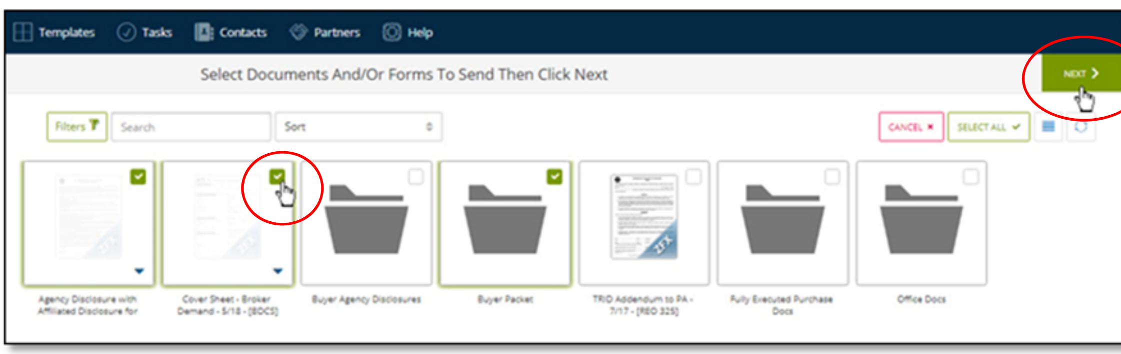


Follow the steps below to send any documents via email from your transaction.

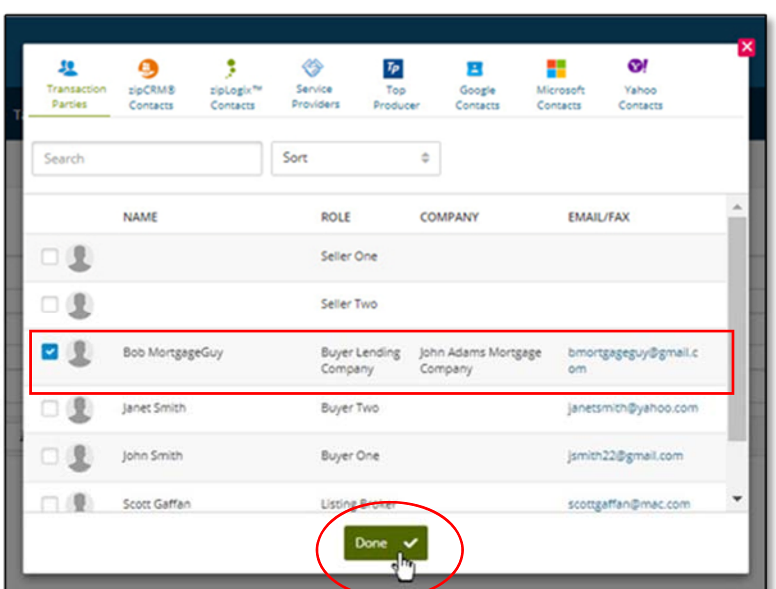
From your transactions **Document Folder**, choose **Email**.



Select the documents that you would like to send via email by adding a check mark in the check box of each document, then choose **Next**.



Choose the party that you would like to email the documents to and choose **Done**.



Enter a **Subject**. Choose to **Send Attachments As Separate PDF Files**. Then choose **Send**.