



OBJECTIVE:

The goal of this class is to learn zipForm® 6 standard (desktop) effectively to create pre-filled templates to eliminate duplicating efforts. Learning the toolbars to utilize the features of zipForm® 6, and signing the documents with both a tablet computer and Digital Ink, an AAR member benefit.

zipForm® 6 - Being a member benefit for all AAR paying members, this is an essential program for conducting a professional business, providing a clean, clear copy of the contract and addendums to clients and other involved parties.

Pre- Difference between zipForm® 6 Professional (online) & Standard (desktop)

A. Downloading zipForm® 6

B. Typing contracts and using templates.

C. Using zipForm® 6 toolbar functions.

D. Initialing and signing forms.

1. With electronic signatures- giving the client the power to sign and feel confident with encrypted signatures.

2. Signing directly on the computer screen with a tablet computer.

E. Saving, filing and sending zipForm® 6 documents to the customer, as well as to the broker, escrow officer and lender.

F. Differences between previous versions and zipForm® 6.

Pre. The difference between the Standard and Professional version

Standard (desktop)

Professional (online)

PROS	CONS
Can access forms with or without internet access	Need computer at all times
Saves transaction for the life of the computer (or if backed up- forever)	
Only updates if connected to internet	Need to download software to start

PROS	CONS
Can access from any computer	Need internet access
Saves transaction for 14 months (unless downloaded to PDF or saved on relay®)	
Automatically updates forms	

You can use both the Standard & Professional version as they use the same format, look & feel. You can put the Standard version on as many computers as you own and can use the Professional version from any computer.

A. Downloading zipForm® 6

1. Downloading zipForm® 6:

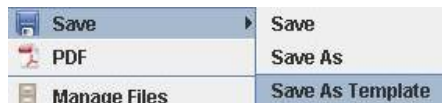
Go to www.zipform.com, then to the *Download* tab where instructions will be displayed. You will need your NRDS (NAR Id #)



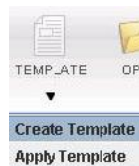
2. Follow instructions to download both the Standard (Desktop) and sign up for the Professional (Online) version. Be sure to check on the ARMLS/AAR library as well before checking out from your shopping cart.
3. You will need to start ALL transactions by opening up the zipForm® 6 application from the icon.

B. Typing contracts and using form templates.

1. The first screen will have everything needed to start the template.
2. Double click on the forms you will use for any generic buyer/seller.
3. Fill in as much information in the blanks *without* referring to a specific buyer/seller or property.
4. Under the *File* tab, go down to *Save* and then *Save As Template*.



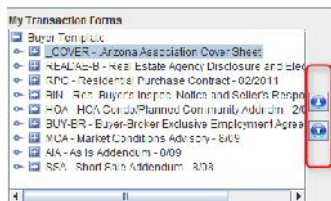
Note: You can also start from the Template tab, then Create Template



Note: You can also add form by dragging and dropping from the Library Forms to My Transaction Forms. You can also right click on the form and add it from there.

Important Points:

- The order that you add the forms can now be changed!
- Realize there are two or more libraries to choose from. This can be found in the drop down menu.
- Selecting All Libraries will allow you to view all forms in all libraries.

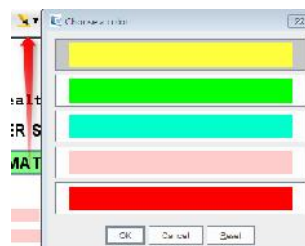


Change the order of forms



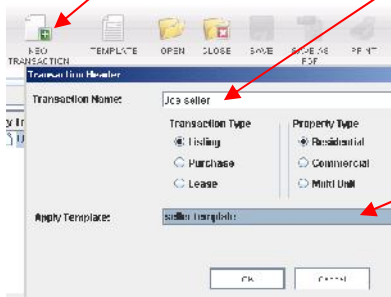
-Highlight where your client has to sign.

Nice pointer: Highlight from left to right and erase from left to right (opposite way will also work!



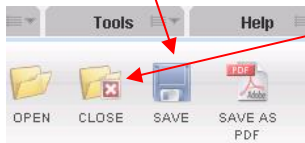
Now that you have your templates for a buyer and seller, you will now start working with specific clients. Start by:

1) On the *File*, *New Transaction* tab, the *Transaction Header* screen will pop up, type in the client's name, choose the Transaction Type & Property Type, and on the drop down menu of Apply Template, choose the appropriate template.

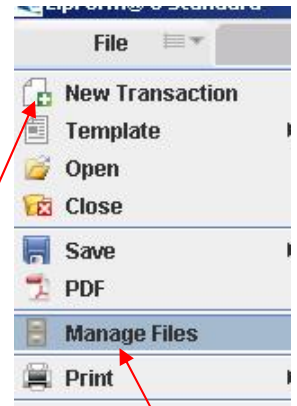
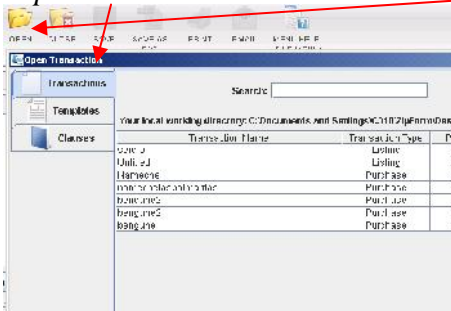


2) As the generic information that you pre-filled in already be there, just fill in the information specific to the client & property. You can also add templates at any time during the transaction.

3) Be sure to *Save* this occasionally and then *Close* after finished.



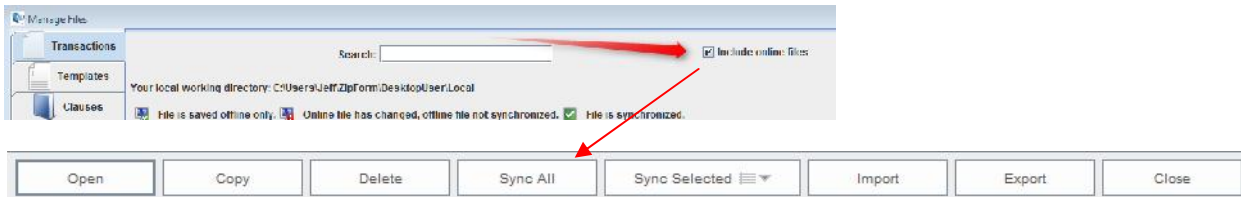
4) To open up a client when you need to work with them, on the *File* screen, click the *Open* icon and choose from the *Open Transaction Screen* and choose the client and click *Open*.



Important Points about the **Manage Files** button

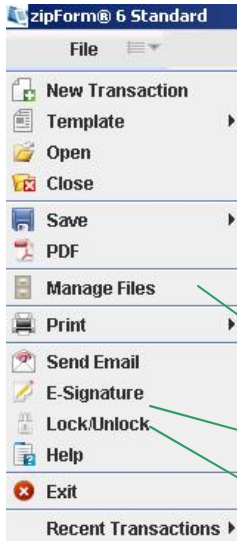
-There are a couple of ways to open up a transaction, including drop down the *File* menu, then *Manage Files*. *Manage Files* is where you can also Copy, Delete, Import, Export and Close & **SYNC!**

-To SYNC the online and desktop version, (one the desktop version) click on *Include online files*



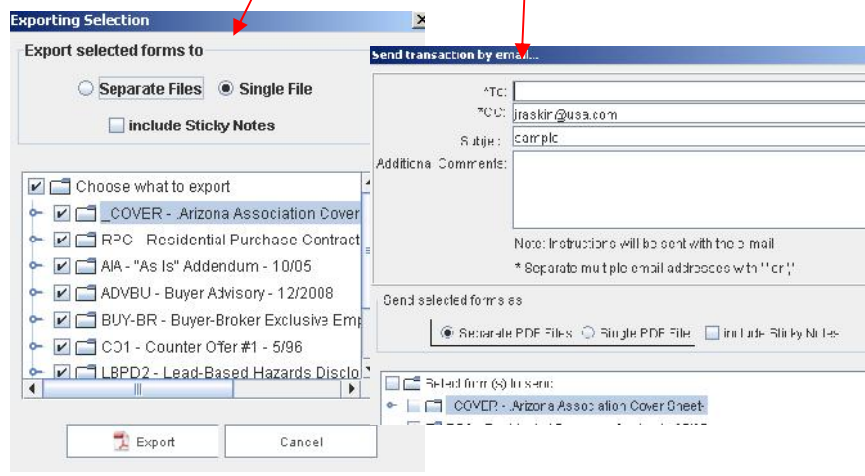
C. Using zipForm® 6 toolbar functions

1. File Tab



Start new client
 Create or apply template
 Open client
 Close client
 Save work
 Print to printer or Journal Note Writer
 Email to client
 Help Videos & FAQ

Manage Files
 E-Signatures- Digital Ink is a member benefit
 Lock/Unlock to change a document

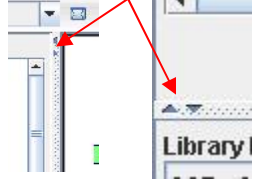


Basic Toolbar



Expand to full screen
 Go to next page or end of document
 View screen in different sizes
 Scale Width
 Cut- Control X does work as well
 Copy- Control C does work as well
 Paste- Control V does work as well
 Strike out a word, phrase in pre-printed forms
 Change words you typed in all lowercase, UPPERCASE, or the First Letter In Uppercase
 Apply N/A or any other phrase to empty fields
 Add new personal "sticky note"
 Fast fill mode to see data fields only
 Redo last action or Control Y
 Undo last action or Control Z

Note: you can also expand or contract the screen by the arrows on the side



2. Edit Tab

Change name or type of transaction

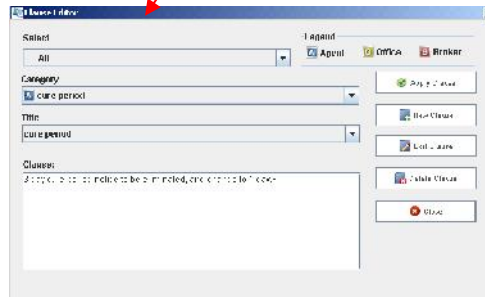
Input "ready" clauses to use anywhere in a documents

Put in "sticky" notes for your own information

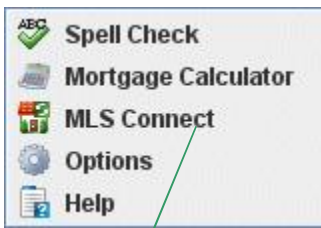
Add, subtract or lookup data fields

Fast fill mode to see data fields only

Help Videos & FAQ



3. Tools Tab



Connect with your MLS system to automatically populate the address, APN #, legal description, listing agent info and much more!

HUGE HINT: The password in MLS connect is the RETS pw, not your MLS ID pw. Get your RETS password by going to MLS, then Preferences, My Profile, then RETS setting.

Spell check a single or all documents

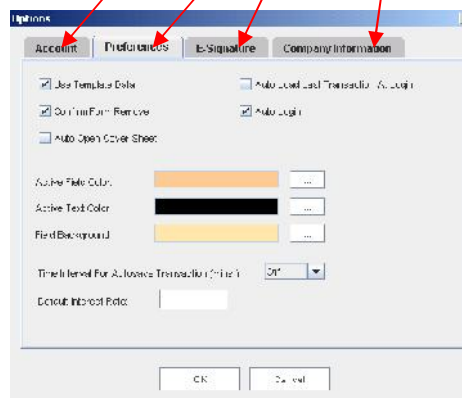
Mortgage calculator for a buyer or seller costs

Change -passwords (the Professional version pw must be put in here to be able to Sync)
-preferences of field colors
-e-sig sign
-company information

Check for updates. Updates will be performed when a document or zipForm® 6 is opened

Import from Outlook® & other files

Help Videos & FAQ



(In Standard (desktop) only, and when connected to the internet)

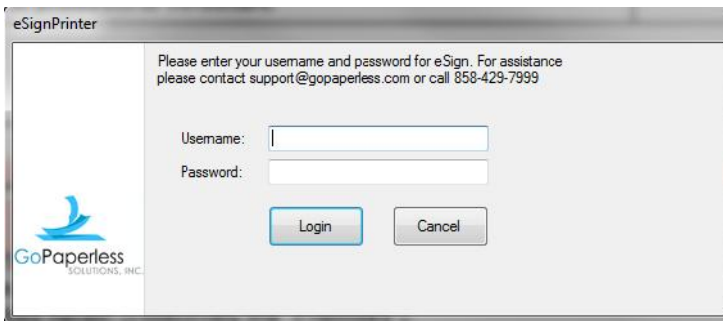
Note: AAR & ARMLS update documents two times a year.



D. Initialing and signing forms AAR MEMBER BENEFIT! (Digital Signatures through GoPaperless®)

You need to go to aaronline, and download the esign driver. It will now be in your printer menu. Get a username and password as well.

First, in zipForm®, after typing up your form, go to Print, then choose eSign Printer. Next, sign into your account.



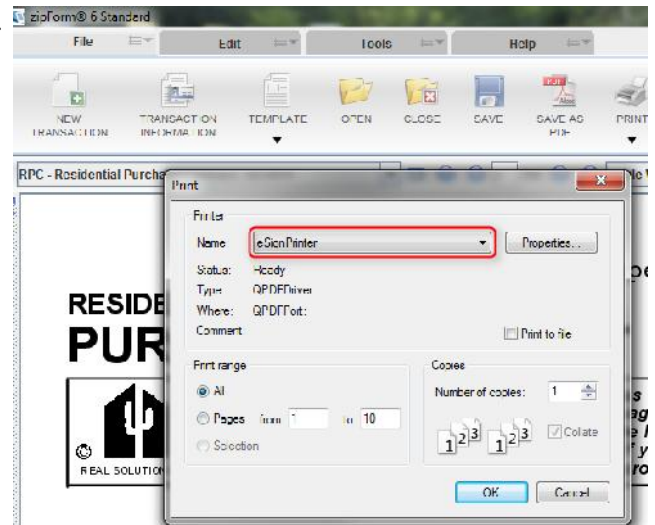
eSignPrinter

Please enter your username and password for eSign. For assistance please contact support@gopaperless.com or call 858-429-7999

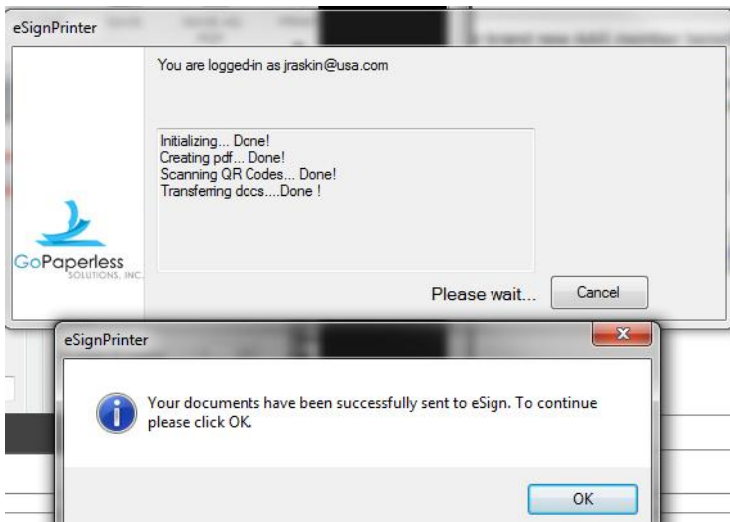
Username:

Password:

GoPaperless SOLUTIONS, INC.



Completed here:



eSignPrinter

You are logged-in as jraskin@usa.com

Initializing... Done!

Creating pdf... Done!

Scanning QR Codes... Done!

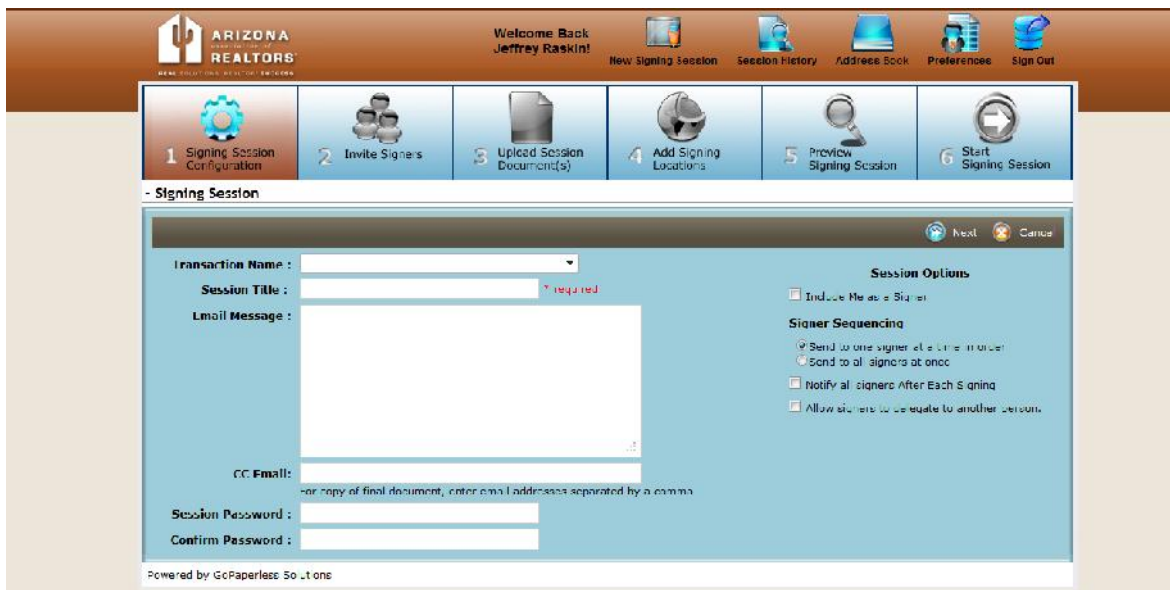
Transferring docs... Done!

Please wait...

eSignPrinter

Your documents have been successfully sent to eSign. To continue please click OK

Go through the wizard to sign zipForm® and other documents



ARIZONA REALTORS

Welcome Back Jeffrey Raskin!

New Signing Session Session History Address Book Preferences Sign Out

- 1 Signing Session Configuration
- 2 Invite Signers
- 3 Upload Session Document(s)
- 4 Add Signing Locations
- 5 Preview Signing Session
- 6 Start Signing Session

- Signing Session

Transaction Name:

Session Title: *required

Email Message:

CC Email: for copy of final document, enter email addresses separated by a comma

Session Password:

Confirm Password:

Session Options

Include Me as a Signer

Signer Sequencing

Send to one signer at a time in order

Send to all signers at once

Notify all signers After Each Signing

Allow signers to delegate to another signer

next

Powered by GoPaperless Solutions

D. Initialing and signing forms DocuSign

1. **Electronic Signatures** - These can be found under the *File* Screen, then *E-Signature*. Steps: "Convert" ANY zipForm® or other documents into DocuSign®, place a tab where the client has to sign or initial

The now "signed" document will come back to you as a PDF with electronic sigs.

Note: Some FHA underwriters and short sale banks will not allow e-sigs. Fannie Mae will also not allow. Check before using. Most title companies will allow.

see and immediately print on the condition, square footage, lot lines, roof, wood infestation, building codes, condition of the Premises.

REQUIRED: CC (BUYER) LC (SELLER)

acceptance is signed by Seller and delivered by Broker named in Section 8r. () o.m., Mountain Standard Time. Buyer's signed acceptance is received by this call be returned.

ATTACHMENTS. PLEASE ENSURE THAT ANY ADDENDA AND ATTACHMENTS.

Initials: CC (BUYER) LC (SELLER)

8r. 357. Broker on behalf of Buyer:

358. Brandon D. Hall BH241 ZipRealty, Inc.
PRINT SALESPERSON'S NAME ACCT CODE PRINT TITLE NAME

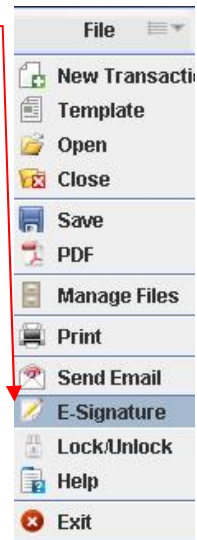
359. FIRM ADDRESS
(623) 215-8451 (480) 422-9099 brandon.hall@zipreal.com
TELEPHONE FAX E-MAIL

8s. 371. Agency Confirmation: The Broker named in Section 8r above is the agent of (check one):
372. the Buyer, the Seller, or both the Buyer and Seller

8t. 373. The undersigned agree to purchase the Premises on the terms and conditions herein stated
374. copy hereof including the Buyer Attachment.

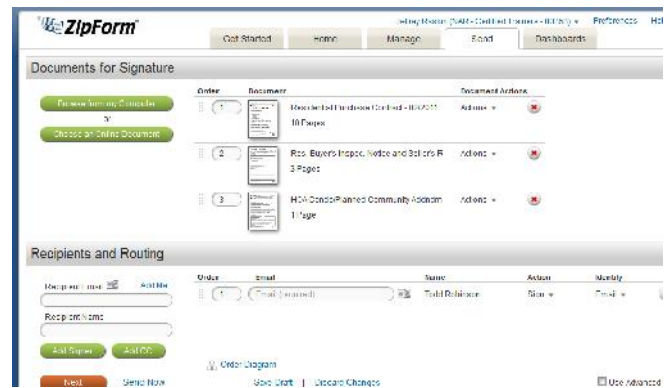
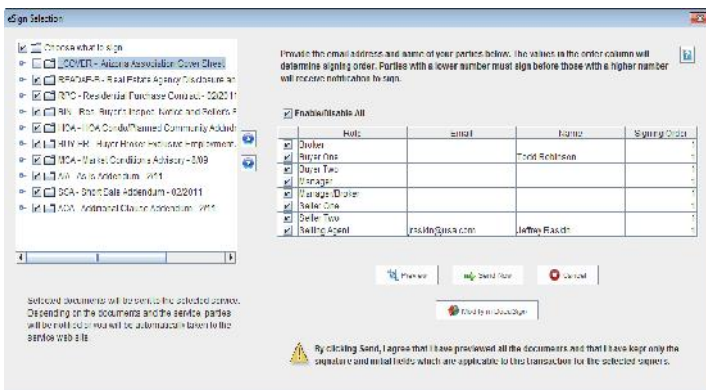
375. Carol Campbell 5/30/2006 Lori Campbell
BUYER'S SIGNATURE MOYDAY BUYER'S SIGNATURE
DocuSign Corp Carol Campbell DocuSign Corp Lori Campbell

376. 22220 N. 21st Pl. 22220 N. 21st Pl.
ADDRESS ADDRESS



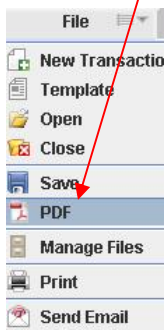
a.

b.



E. Saving, filing and sending zipForm® 6 documents to the customer, as well as to the broker, escrow officer and lender

All forms, once filled, MUST be converted to a PDF file format. This PDF Writer feature is built into zipForm® 6 (*File*, *PDF* or *SAVE AS PDF* button) You can save into the appropriate client folder for future reference and for emailing or faxing out. (You may also able to email directly from zipForm® 6 to send file as a PDF attachment)



Conclusion: zipForm® 6 is a great improvement and puts all the essential tools and information on the first page, so jumping around is not necessary. Since the Professional and Standard version are essentially identical, jumping from one product to the other is easy. Professional, quick and easy- this will change the way you do business.