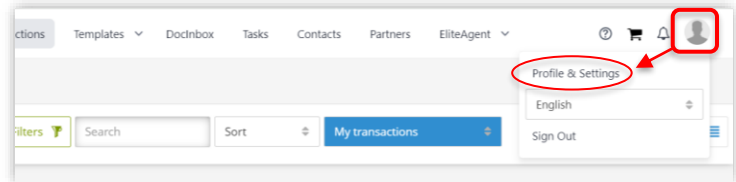


DocuSign is a third-party, paid signing service that is available to use to send documents for signature from your zipForm transaction. Follow the steps in this guide to create and send your signing packet using DocuSign.

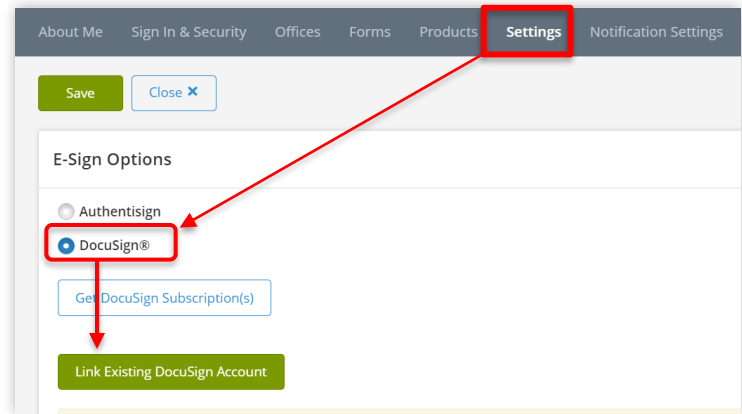
Set your Default Signing Service

It is important to set the default signing service to DocuSign in your zipForm profile before you start a signing packet.

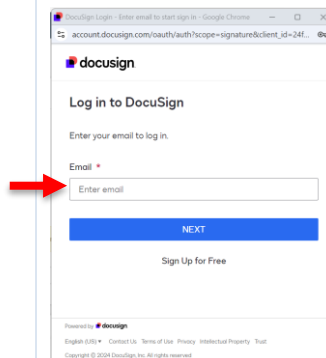
1. Inside your zipForm account, click the photo in the top right corner.
2. Select **Profile & Settings** from the menu.



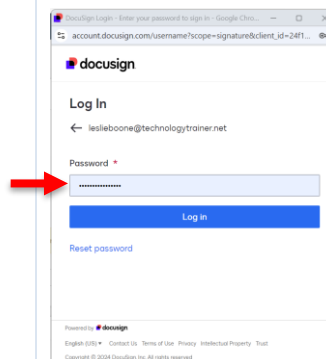
3. Click **Settings** in the gray navigation bar.
4. In the **E-Sign Options** section, click the radio button next to DocuSign.
5. Then click [Link Existing DocuSign Account](#) to link your DocuSign account.



6. Enter the email address associated with your DocuSign account.
7. Click [NEXT](#) to continue.




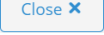
8. Enter the password associated with your DocuSign account.
9. Click [Log in](#) to continue.

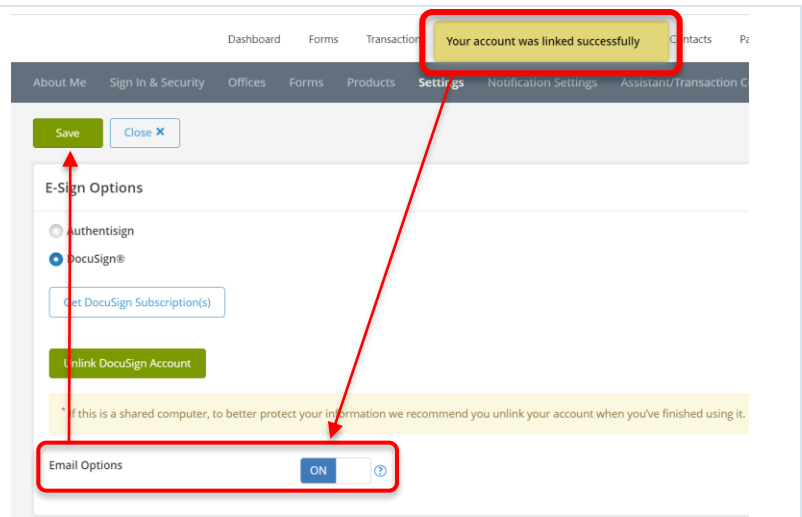


A message stating “Your account was linked successfully” will display at the top of the screen.

10. Email Options – (optional) click the slider to “ON” if you’d like to receive an email notification from zipForm when signed documents have been returned to your transaction.

11. Click  at the top left to save your changes.

12. Click  at the top left to exit your profile.

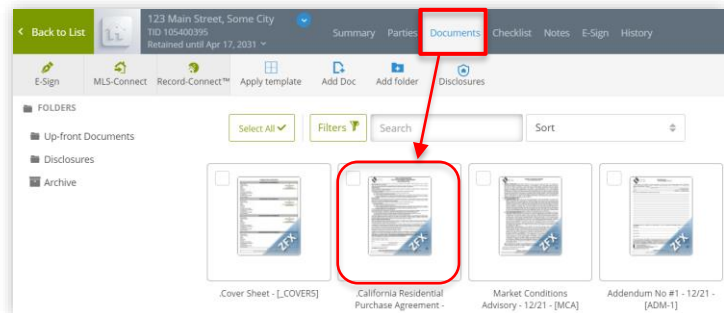


Start a Signing Packet

There are multiple ways to start a signing packet inside a zipForm transaction. This section will cover the two ways to start a signing packet inside the Form Editor, either with selected forms or with all forms in the Workspace.


Inside the Form Editor

1. From the **Documents** tab inside your transaction, click on a document to open it in the Form Editor.

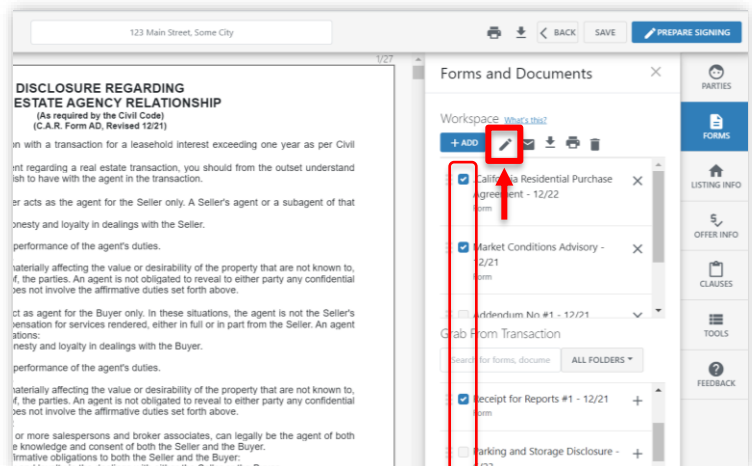


SELECTED FORMS

1. Check the box(es) next to the form(s) you’d like to send for signing. You can select forms in both the **Workspace** and **Grab From Transaction** sections.

2. Click  in the **Workspace** to start a signing packet with the selected forms.

Go to the next section labeled “Create and Send a Signing Packet” to continue with your signing packet.

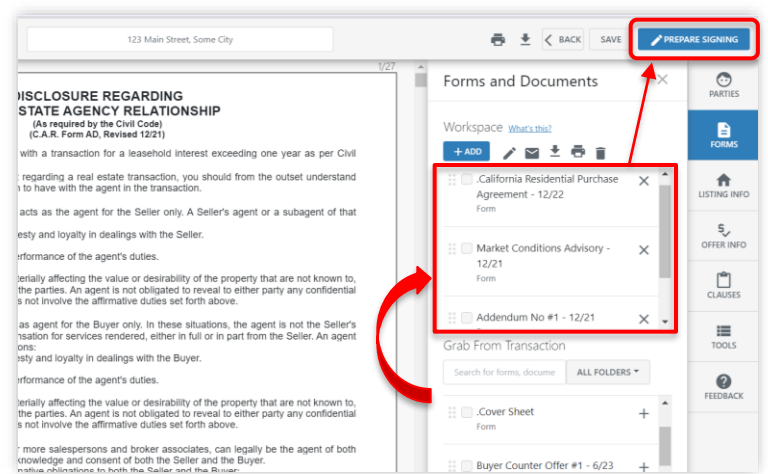


ALL FORMS IN THE WORKSPACE

1. (optional) Click and drag any additional forms you'd like to send for signature from the **Grab From Transaction** section to the **Workspace**.

2. Click **PREPARE SIGNING** to start a signing packet with **all forms in the Workspace**.

Go to the next section labeled “Create and Send a Signing Packet” to continue with your signing packet.



Create and Send a Signing Packet

After starting a signing packet with either selected forms or all forms in the Workspace, you will create and send it to the recipients for signature.

Select Forms



On this screen, you can add new forms, remove forms, and rearrange the order of the forms.

1. **E-Sign Packet Name** = this is the name of the folder that the system will create when signed documents are returned to your transaction. You may edit the packet name, if desired.

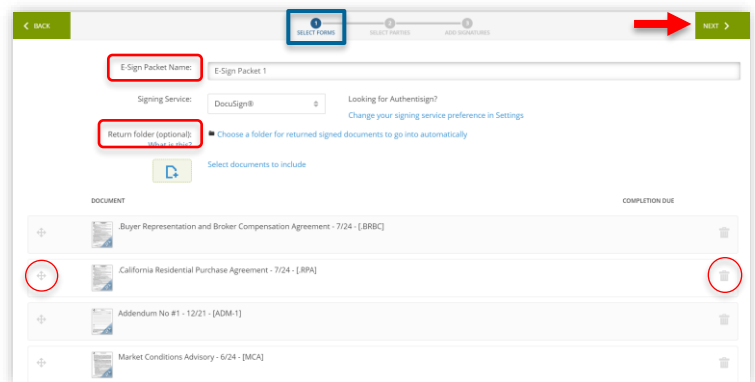
NOTE: Only the agent can see the packet name – it is not visible to signers or anyone else.

2. **Return Folder (optional)** = the system will automatically create a folder for the signed documents to be returned to, however, you may select a folder that you created, if desired.

3. Documents:

-  = click and drag to rearrange the order of the documents in the list.
-  = click to delete a document from the signing packet.

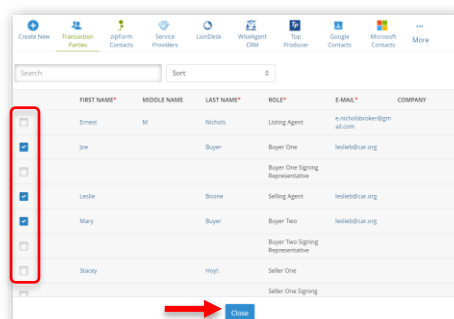
4. Click **NEXT >** at the top right to continue.




Select Parties


1. Check the box next to the name of each person that needs to sign documents.


2. Click **Close** when you're finished selecting signers.



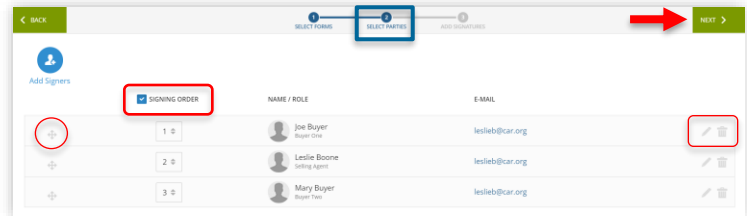
3. Signing Order = the signing order is on by default when using DocuSign through zipForm. If you'd like everyone to get their invitation to sign at the same time, then uncheck the Signing Order checkbox.

4.  = (optional) Click and drag to rearrange the order of the signers. This only applies if the Signing Order is on.

5.  = Click to edit the signer's name or email address, if needed.

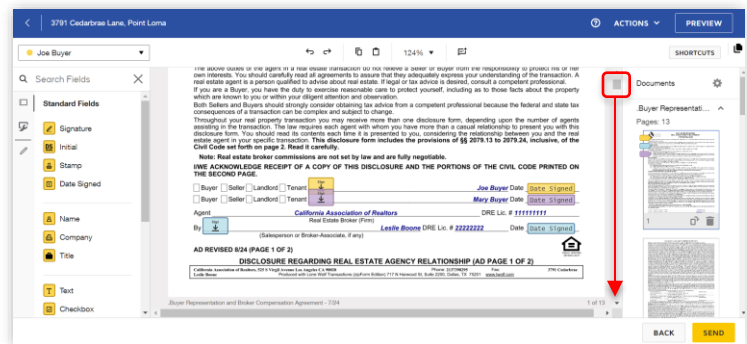
6.  = Click to delete a signer from the signing packet.

7. Click  at the top right to continue to DocuSign.



There are some forms that may require you to manually place tags.

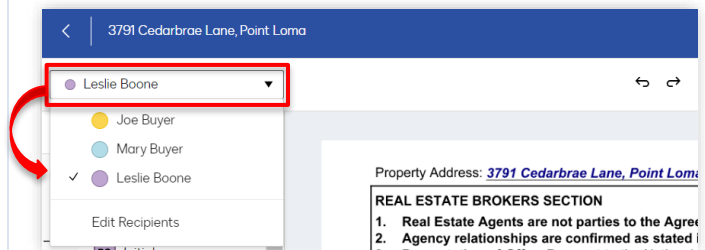
It is recommended to scroll through the documents in the middle of the screen and do a visual check to see if there are any documents that need tags placed manually.



Place Tags Manually

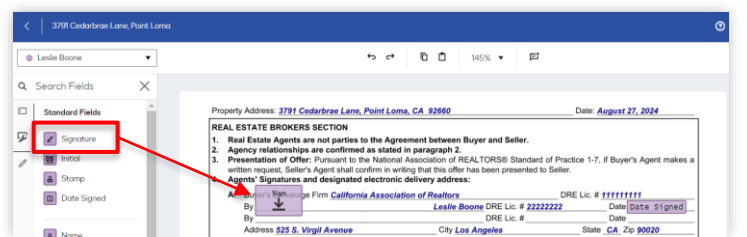
Some documents may require manual placement of tags if they are not mapped automatically for you. Follow the steps in this section to place tags manually, if needed.

1. Select the Recipient = click the dropdown menu at the top left to select the recipient you'd like to place tags for.



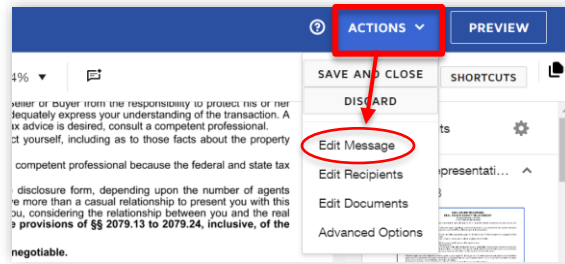
2. Click and drag the tags from the menu on the left over to the document.

3. Repeat the above steps for each signer that needs tags placed manually on documents.



Edit Email Invitation (optional)

1. Click **Actions** at the top right and select **Edit Message** from the menu.



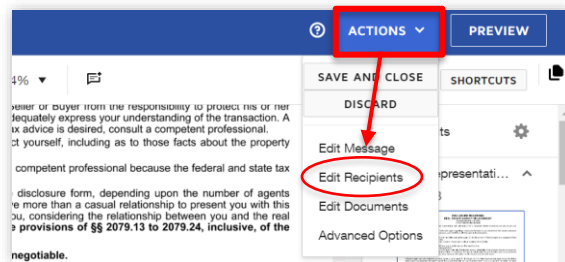
2. **Email Subject** = (recommended) this is the subject line for the email invitation that the signers will receive *and* what you'll track this envelope by in your DocuSign account. It is recommended to add text to the Email Subject, such as the documents you are sending (i.e. "Offer Documents", "Seller Disclosures", etc.), so the signers know what they are receiving.

3. **Custom email and language for each recipient** = (optional) check the box if you'd like to type separate messages to each recipient.

4. Click **DONE** to return to your signing packet.


Edit Recipients

1. Click **Actions** at the top right and select **Edit Recipients** from the menu.



2. **Set signing order** = check the box for the recipients receive their invitations to sign in a specific order.

3. **Needs to sign/CC** = if you'd like to CC a recipient, click the dropdown menu next to "Needs to sign" and select "Receives a copy".

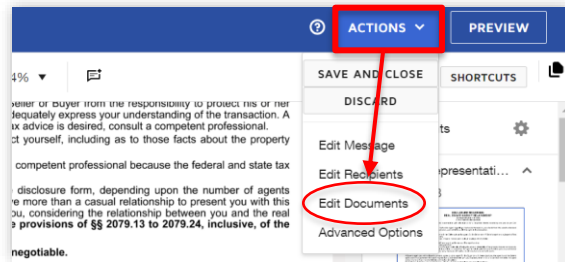
4.  = click to delete a signer from the signing packet.

5. **Add Recipient** = click **Add Recipient** to add additional signers or a CC.

6. Click **DONE** to return to your signing packet.

Add PDF Documents

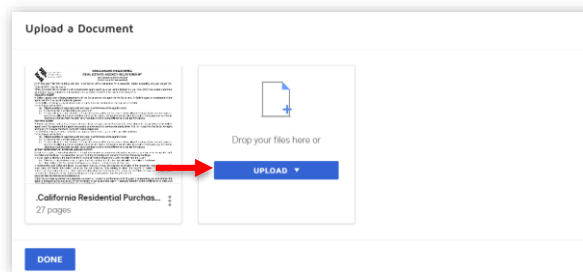
1. Click **ACTIONS** at the top right and select **Edit Documents** from the menu.



2. Click **UPLOAD** to upload PDF files saved on your device or in cloud storage.

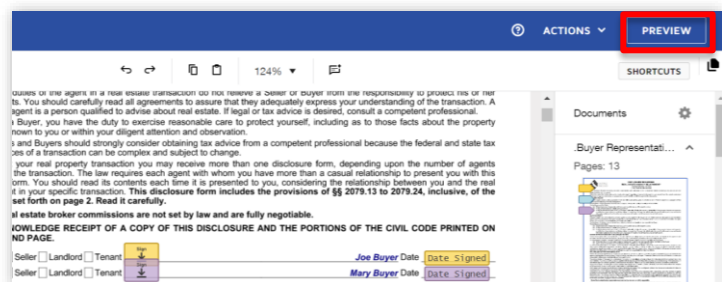
3. **Rearrange the order** = (optional) after uploading your PDF files, click and drag to rearrange the order of the documents, if desired.

4. Click **DONE** to return to your signing packet.



Preview (optional)

1. Click **PREVIEW** at the top right to preview the tags for each signer and to see what your client sees when they open the signing invitation.

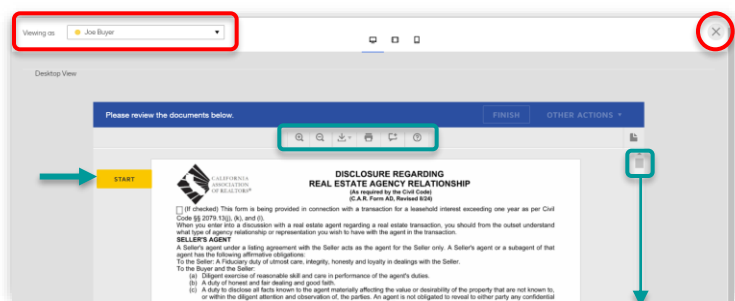


2. **Viewing as** = select the signer from the dropdown menu that you'd like to view signing tags for.

3. **Client Controls:**

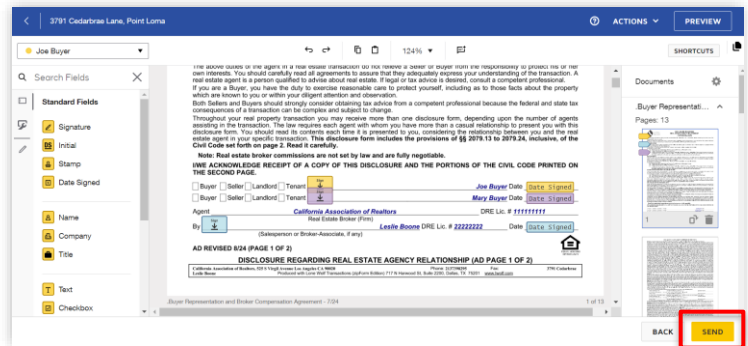
- = zoom in/out
- = download
- = print
- Use the scroll bar on the right to read through the documents.
- Click **START** on the left to start the signing.

4. Click the gray 'X' at the top right to exit Preview and return to your signing packet.

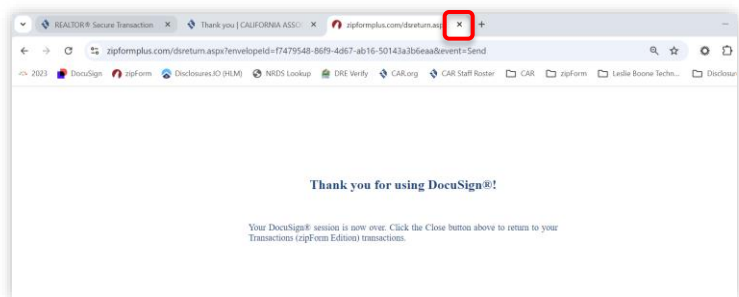


Send for Signature

1. Click **SEND** at the bottom right to send the signing packet to the recipients for signature.



2. After you see the message “Thank you for using DocuSign®!”, close the tab in your browser.



3. **IMPORTANT** – Next, return to your zipForm transaction in the browser:

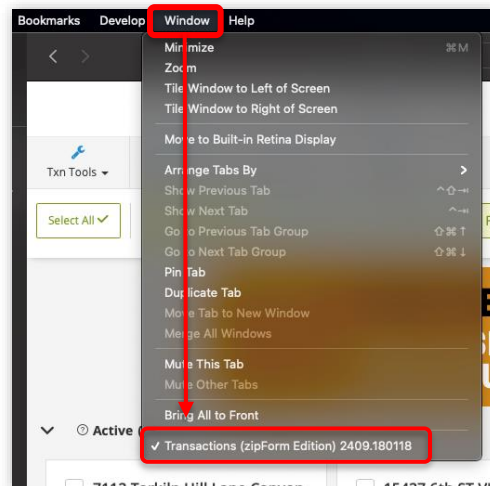
- **PC Users** – hover your mouse over your browser icon in the taskbar at the bottom of the screen, then click on the window that displays your zipForm transaction.

PC Users:



Mac Users:

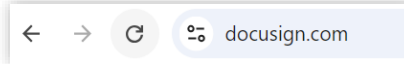
- **Mac Users** – click the menu labeled **Window** at the top left of your browser screen and select “Transactions (zipForm Edition)” at the bottom of the menu.



Track the Status, Correct, or Void a Signing Packet

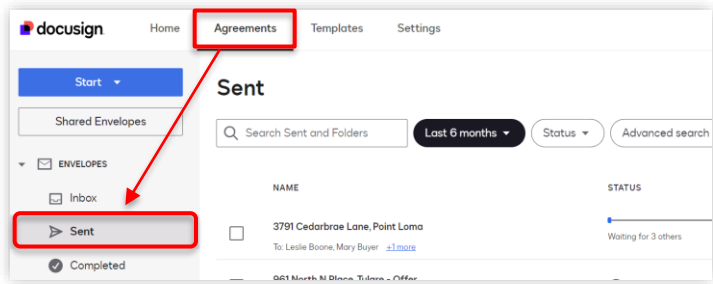
You will login to your DocuSign account directly on the web to track the status, correct, or void a signing packet.

1. In your browser, go to www.docusign.com and login to your DocuSign account.

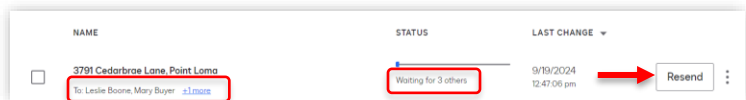


Track the Status

1. Click **Agreements** at the top left.
2. Click the **Sent** folder on the left-hand side to view signing packets you've sent.

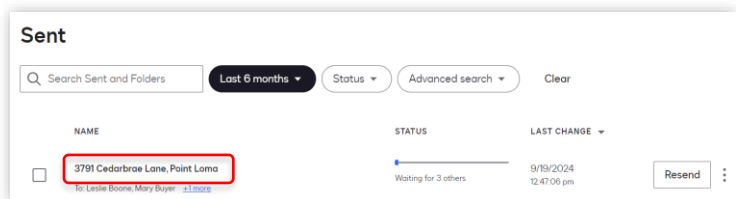


3. Click the link labeled **+1more** under the packet name to view all signers for this packet.
4. Click the link labeled **Waiting for 3 others** to view who still needs to sign.
5. Click **Resend** to automatically resend the signing invitations to everyone listed under **Waiting for others**.



Correct a Signing Packet

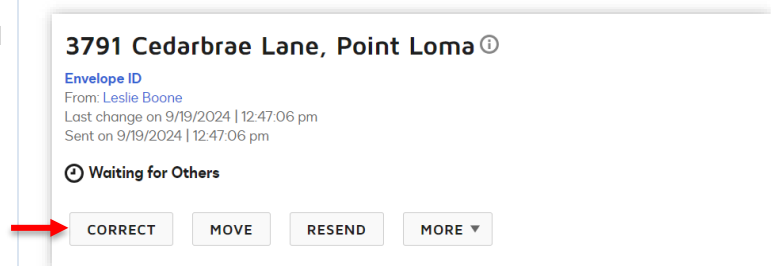
1. Click on the name of the signing packet to open it.




2. On the next screen, click **CORRECT** on the top left side and make your corrections on the next screens. You can correct things like email addresses, signing tags, and even add PDF documents if the recipients have not started signing.

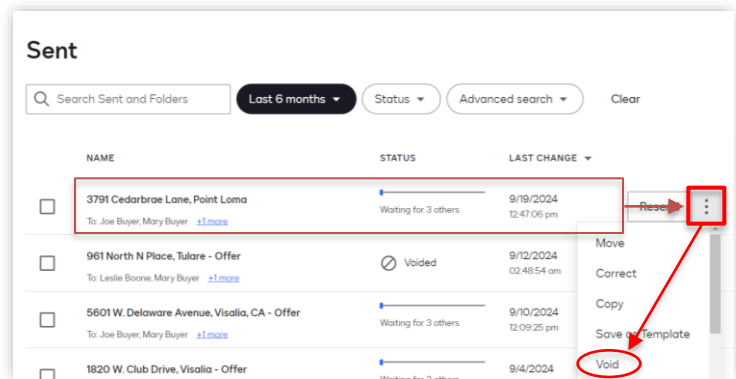
NOTE: You will be prompted to go through the signing packet steps as if you are creating the packet for the first time.

3. When you're done with your corrections, click **SEND** on the last screen to send new signing invitations to the recipients.



Void a Signing Packet

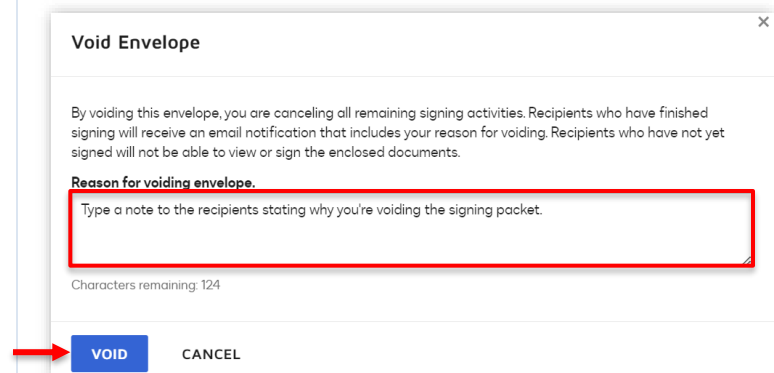
1. Click  to right of the signing packet you'd like to void, then select **Void** from the menu.



NAME	STATUS	LAST CHANGE
3791 Cedarbrae Lane, Point Loma To: Joe Buyer, Mary Buyer +1 more	Waiting for 3 others	9/19/2024 12:47:06 pm
961 North N Place, Tulare - Offer To: Leslie Boone, Mary Buyer +1 more	Voided	9/12/2024 02:48:54 am
5601 W. Delaware Avenue, Visalia, CA - Offer To: Joe Buyer, Mary Buyer +1 more	Waiting for 3 others	9/10/2024 12:09:25 pm
1820 W. Club Drive, Visalia - Offer	Waiting for 3 others	9/4/2024

2. Type a note to the recipients stating why you're voiding the signing packet.

3. Click **VOID** to void the signing packet and send a message to the recipients.



Void Envelope

By voiding this envelope, you are canceling all remaining signing activities. Recipients who have finished signing will receive an email notification that includes your reason for voiding. Recipients who have not yet signed will not be able to view or sign the enclosed documents.

Reason for voiding envelope.

Type a note to the recipients stating why you're voiding the signing packet.

Characters remaining: 124

VOID CANCEL