# THE NEW FORMS EDITOR

## **QUICK START GUIDE**

Real estate's favorite forms editor for Transactions (zipForm Edition) is more modern, intuitive, and features automation for better data flow and error-free forms.



Fill out multiple forms at once, add and personalize clauses in a few clicks, and more-get to know your new forms editor.

| - FIT TO WIDTH + +     |  |                        | ▶ PREPARE SIGNING |
|------------------------|--|------------------------|-------------------|
| Sheet                  | 1/4  | Forms and Documents    | 2 DARTIES         |
| TRANSACTION (          | COVER SHEET  | Workspace What's this? |                   |
| BUYER/TENANT ON        | IE INFORMATION   | + ADD                  | 3 FORMS           |
| Buyer Name:            | Check this bout if you would allow on "I" to Appear on all signatures and initial from for Buyer One.  To add more than 2 Buyers  To had more than 2 Buyers  To had not be the Parlets to be | .Cover Sheet           | LISTING INFO      |
| Zip Code:              | (Gound next to the Documents lab on the previous screen).  |                        | OFFER INFO        |
| Fax Number:            |  |                        | 5 CLAUSES         |
| BUYER/TENANT TW        | O INFORMATION  |                        | 6 - TOOLS         |
| Buyer Name:            | Check this box if you would like an "x" to<br>Appear on all signature and initial lines for<br>Buyer Twe.  To SHARE files with cleans or other transaction learn members.                    |                        | 7 PEEDBACK        |
| Zip Code:              | clisk SHARE IN THE Parties Tab (ator found in Transaction Summany).  |                        |                   |
| Business Phone Number: |  |                        |                   |
| Email Address:         | ONE INFORMATION  |                        |                   |

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## Top dashboard:

Zoom in/out or adjust width of your screen; edit the transaction name; and use buttons to return back to paper portion or continue to signing



#### **Parties**

All contacts related to your transactions and forms can be added, edited, deleted, or viewed



#### **Forms**

Add forms from transactions/libraries, or upload other files to build out the signature package before signings begin



## Listing & Offer Info

Import MLS listings, tax records, and verify the right listings details have pulled in from other forms (the info in these sections will auto populate onto all other forms and vice-versa!)



#### Clauses

With advanced rich text editor functionality for better content and clause variables with automation capabilities



#### **Tools**

Add notes, highlight text, and more—plus set default markup settings for quicker markups for in the future



### Leave feedback

Leave your feedback on the new platform so we can continually evolve the tool to meet your needs