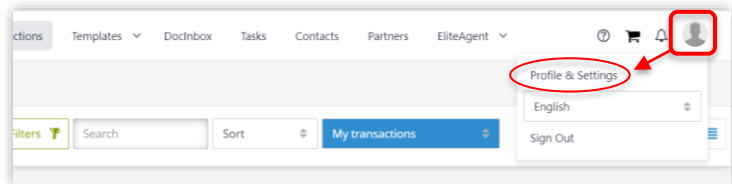


DocuSign is a third-party, paid signing service that is integrated into your zipForm account to send documents for electronic signature from a zipForm transaction. Follow the steps in this guide to create, send, track, edit, and void a signing packet using DocuSign.

Set your Default Signing Service

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

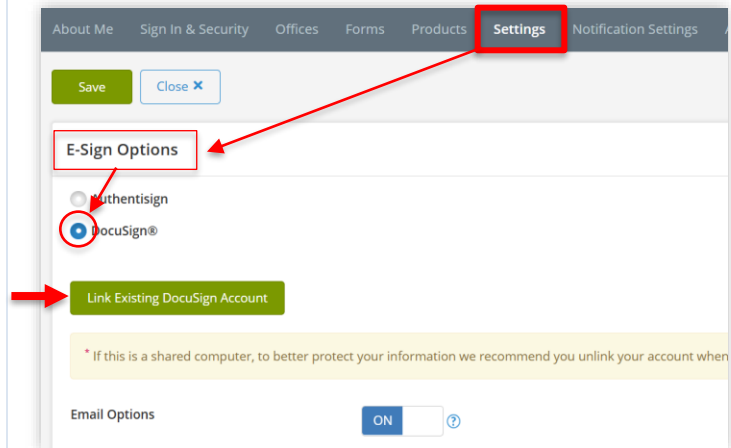
1. Inside your zipForm account, click the photo in the top right corner and select **Profile & Settings** from the menu.



2. Click the **Settings** tab in the gray navigation bar at the top.

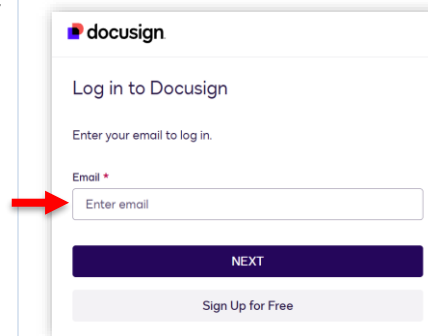
3. In the **E-Sign Options** section, click the button next to DocuSign to set this as your default signing service.

4. Click [Link Existing DocuSign Account](#) to link your DocuSign account.



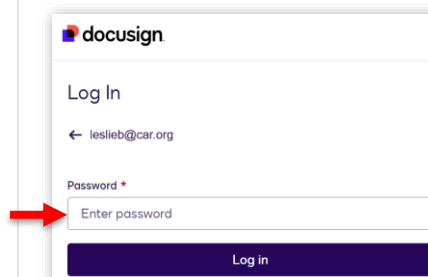
5. Type the email address associated with your DocuSign account.

6. Click [NEXT](#) to continue.



7. Type the password associated with your DocuSign account.

8. Click [Log in](#) to continue.

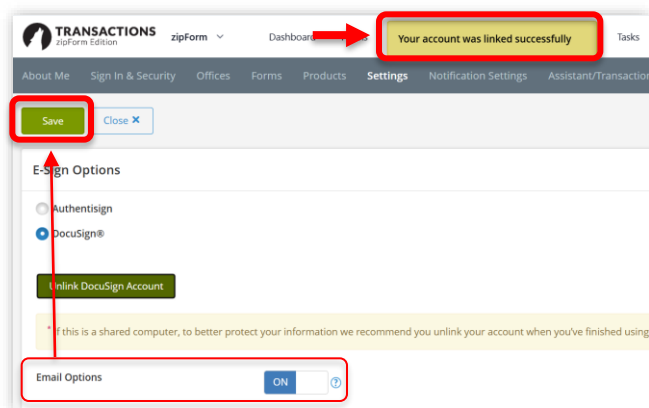


A message stating “Your account was linked successfully” will display at the top of the screen.

9. 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.

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

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

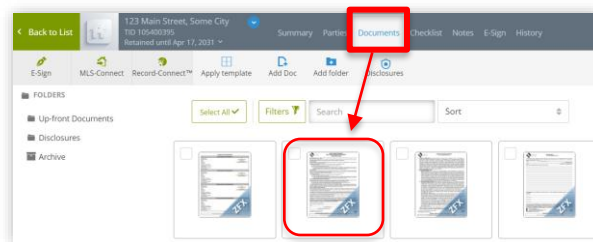


Start a Signing Packet

There are multiple ways to start a signing packet inside a zipForm transaction. This section covers the two most common ways to start a signing packet inside the Form Editor – 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**.

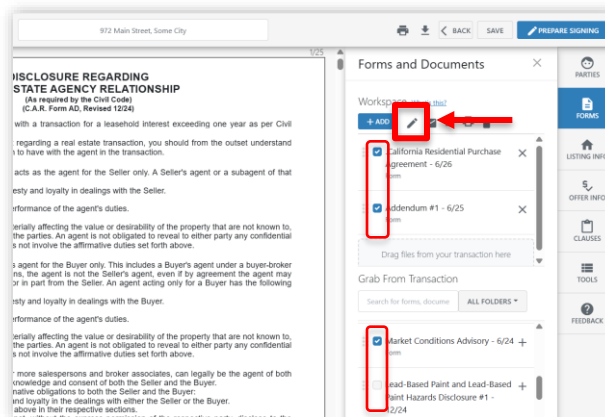


SELECTED FORMS

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*.

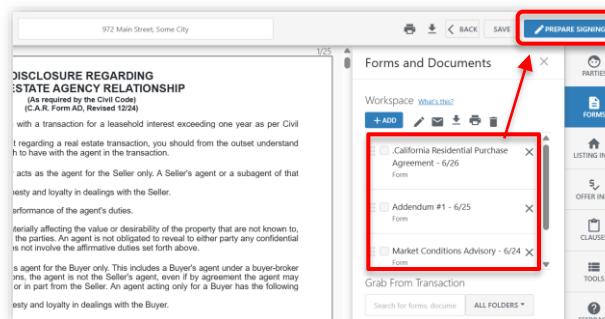
Follow the section below labeled “Create and Send a Signing Packet” to continue with your signing packet.



ALL FORMS IN THE WORKSPACE

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

Follow the section below 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 the packet to the signers for signature.

Select Forms

Add forms, remove forms, and rearrange the order of the forms.

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

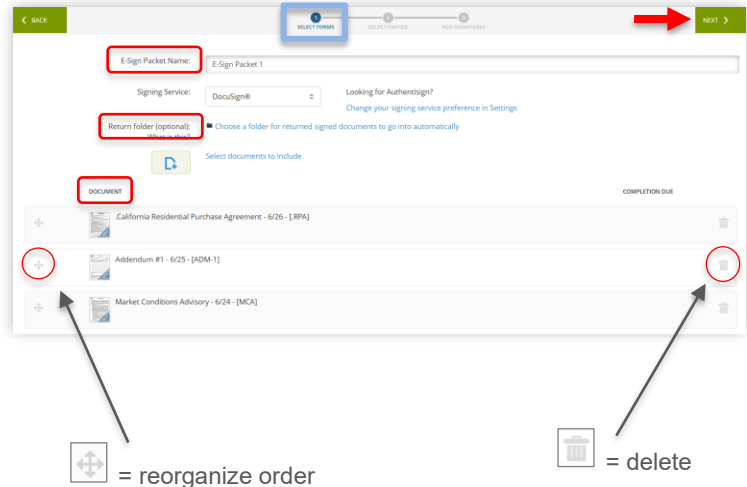
NOTE: Only the agent can see the packet name – it is not visible to signers or anyone else.

2. Return Folder (optional) = the system will automatically create a folder for the signed documents when they are returned to your transaction, or you may select a folder that you created, if applicable.

3. Documents:

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

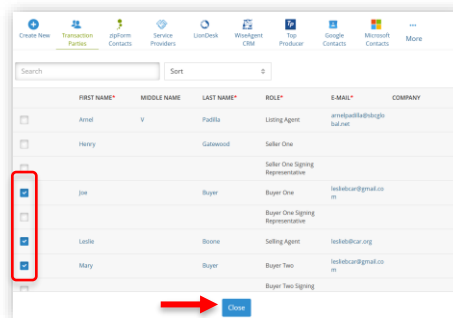
4. Click **NEXT >** at the top right to continue.



Select Parties

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

2. Click **Close** at the bottom of the window when finished.

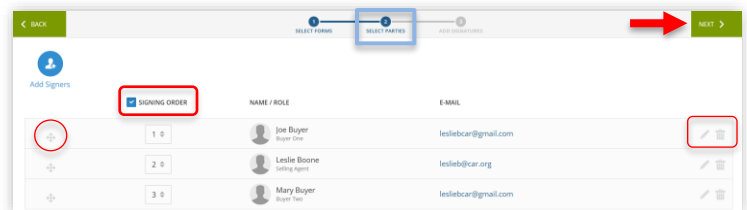


3. Signing Order = this is on by default. Signing invitations will go to one signer at a time. If you'd like everyone to get their signing invitation at the same time, uncheck the Signing Order checkbox.

4. Optional features and functions:

-  = click and drag to rearrange the order of the signers. *This only applies if the Signing Order is on.*
-  = click to edit the signer's name or email address, if needed
-  = click to delete a signer from the signing packet

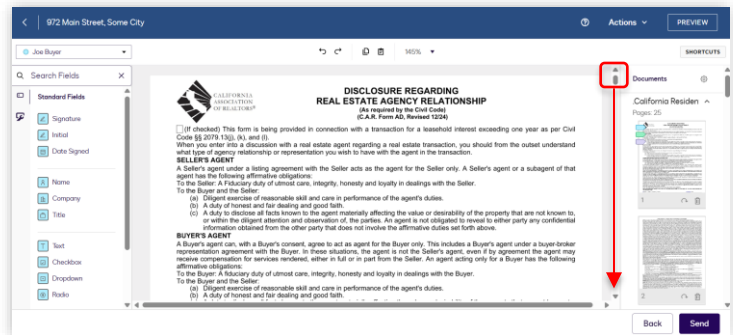
5. Click **NEXT >** at the top right to continue to DocuSign.



zipForm: Using DocuSign inside zipForm

Some forms may require tags to be placed manually.

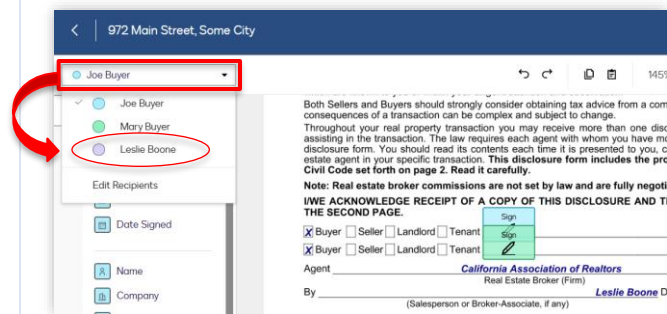
It is recommended to scroll through every page of the signing packet and do a visual check to see if any documents need tags placed manually.



Place Tags Manually

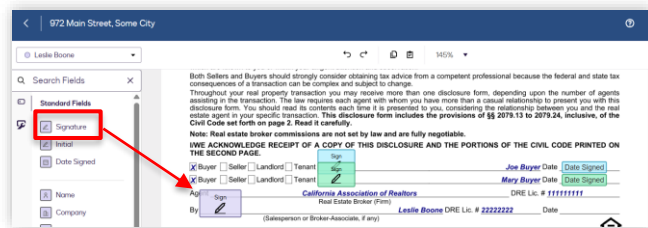
Some documents may require manual placement of signature, date, and initial tags. Follow the steps in this section to place tags manually, if needed.

1. Select the Recipient = click the dropdown menu at the top left and select the recipient that you need to place tags for.



2. Click and drag a tag from the left navigation pane to the document.

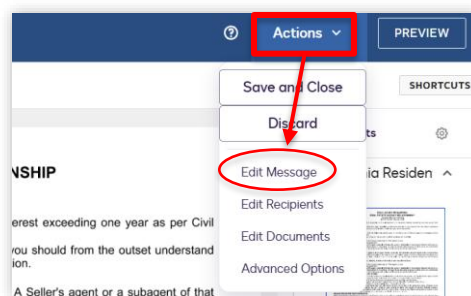
Repeat the above steps for each tag that needs manual placement. Remember to select a different signer from the dropdown menu at the top left when placing tags for multiple signers.



Edit Email Invitation (optional)

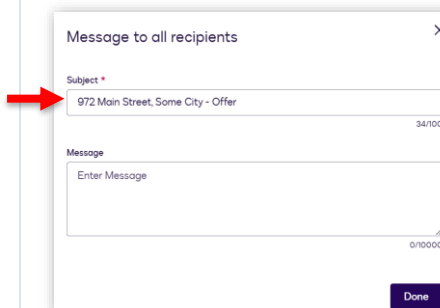
This feature allows you to edit the subject line for the email invitation the signers receive.

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



2. Email Subject = (recommended) this is the subject line of the email invitation that the signers receive **and** the name of the signing packet you'll track in your DocuSign account. It is recommended to add text to the Subject line, such as the name of the documents you are sending (ex. "Offer", "Disclosures", etc.).

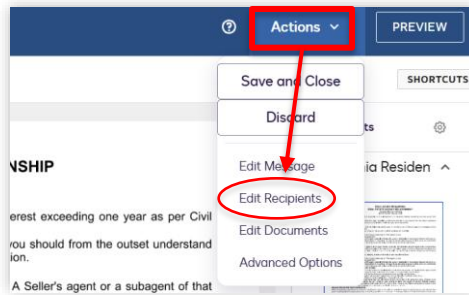
3. Click Done to save your changes and return to the signing packet.



Edit Recipients (optional)

This feature allows you to edit the signer names and email addresses, turn on the signing order, or add a CC, if needed.

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



2. **Set signing order** = (optional) check the box if you'd like the recipients to receive their email invitations in a specific order.

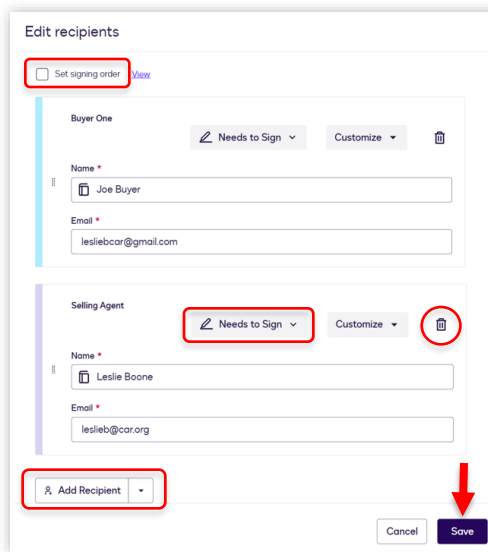
3. **Needs to sign/CC** = (optional) click the dropdown menu next to "Needs to sign" and select "Receives a copy" if you'd like to CC a recipient.

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

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

NOTE: signers added at this step will require manual placement of tags.

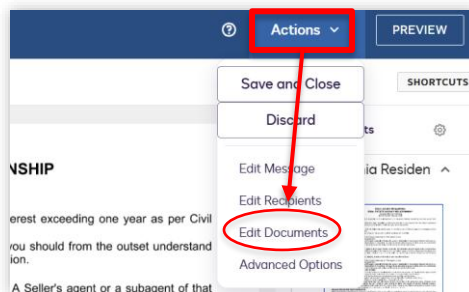
6. Click **Save** at the bottom of the window to save your changes and return to the signing packet.



Add PDF Documents (optional)

This feature allows you to upload PDF documents directly into the signing packet and rearrange the order of all documents in the signing packet.

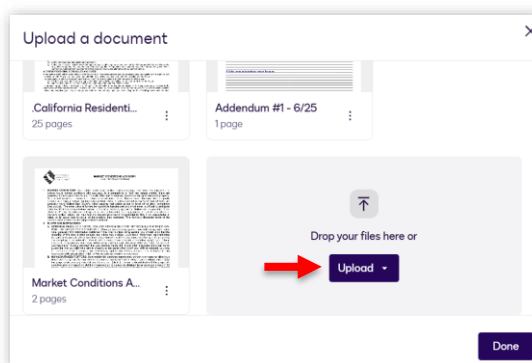
1. Click **Actions** at the top right and select **Edit Documents** from the menu.



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

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

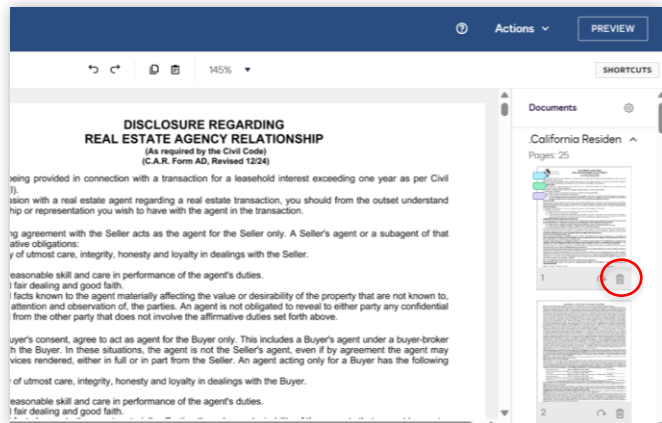
4. Click **Done** at the bottom of the window to save your changes and return to the signing packet.



Delete Pages (optional)

This feature allows you to remove pages from the signing packet before sending it for signature.

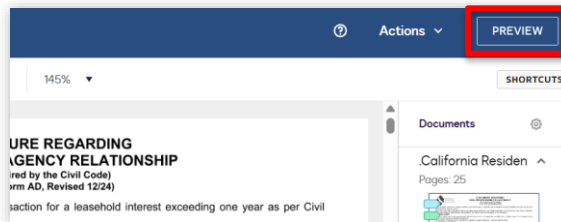
1. Click  at the bottom right of the thumbnail on the right side to remove a page from your signing packet. Pages can only be removed one at a time.



Preview (recommended)

This feature allows you to view any manually placed tags as well as what the signer sees when they are signing.

1. Click  at the top right to preview any manually placed tags and what the signer sees when they are signing.



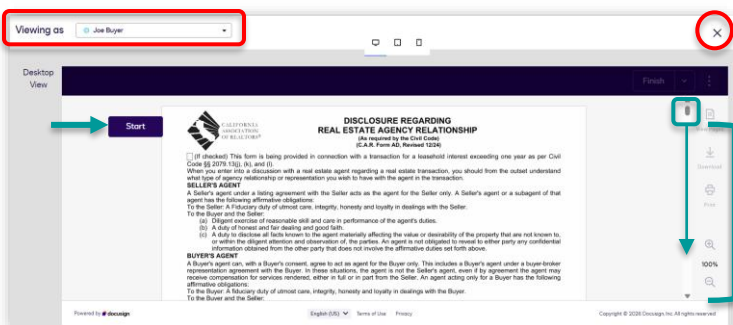
2. **Viewing as** = select the signer from the dropdown menu that you'd like to view tags for.

3. Client Controls (left side):

- Click  to start signing

4. Client Controls (right side):

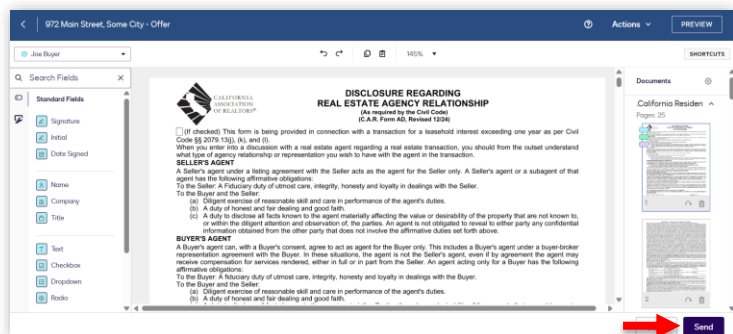
-  = download
-  = print
-   = zoom in/out
- Use the scroll bar on the right to view the documents.



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

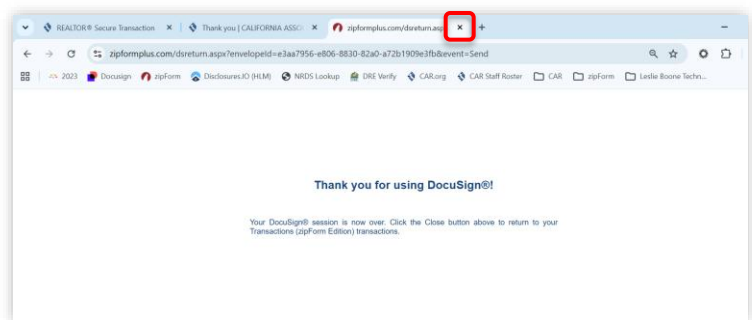
Send for Signature

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



After the signing packet is sent, the message “Thank you for using DocuSign®!” will display in your browser.

2. Click **X** to close the tab in your browser and follow the steps below for PC or Mac to return to your zipForm transaction.



3. **IMPORTANT** – Return to your zipForm transaction in the browser:

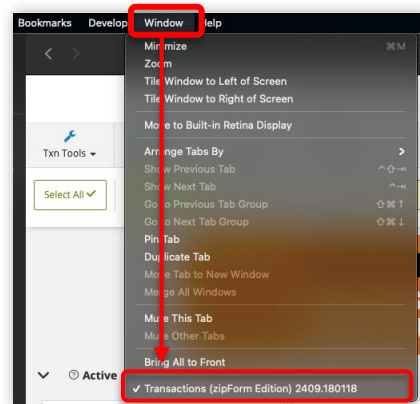
- **PC Users** – hover your mouse over your browser icon in the taskbar at the bottom of the screen and click on the window that displays your zipForm transaction.

PC Users:



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

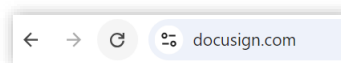
Mac Users:



Track the Status, Correct, and Void a Signing Packet

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

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

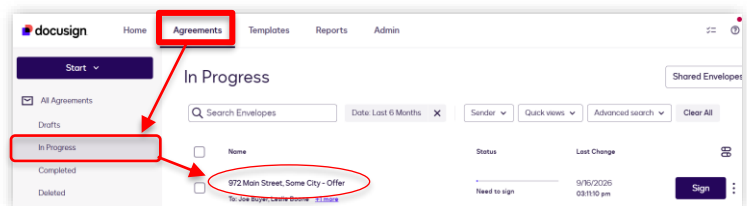


Track the Status

This feature allows you view the signing order, the signing status for each signer, and resend signing invitations.

1. Click **Agreements** in the top navigation bar.

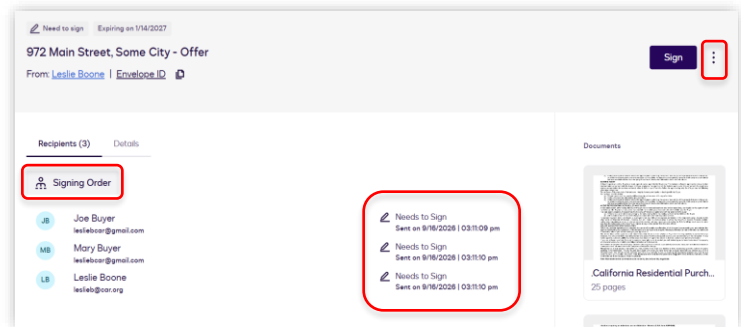
2. Then, click the **In Progress** folder on the left and select the **name of the signing packet** to open it.



3. Signing Order – click to view if the signing order was on or off when you sent the packet.

4. Status – view the signing status next to each signer to determine if they have completed their signing or still need to sign.

5. Resend – click the **three dots** at the top right and select “Resend” from the menu to automatically resend signing invitations to any signer with a status of “Needs to Sign”.

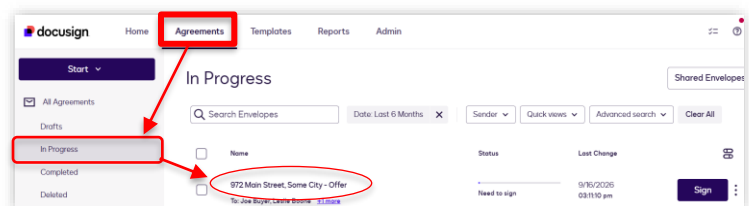


Correct a Signing Packet

This feature allows you to edit a signer's name and email address, add/remove signing tags, set the signing order, and add/remove documents.

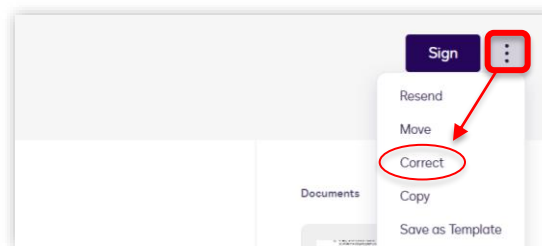
1. Click **Agreements** in the top navigation bar.

2. Then, click the **In Progress** folder on the left and select the **name of the signing packet** to open it.



3. Click the **three dots** at the top right and select “Correct” from the menu.

IMPORTANT: Some correction features and functions may be disabled or grayed out if a recipient has already started signing.



4. On the next screen, you may edit the following:

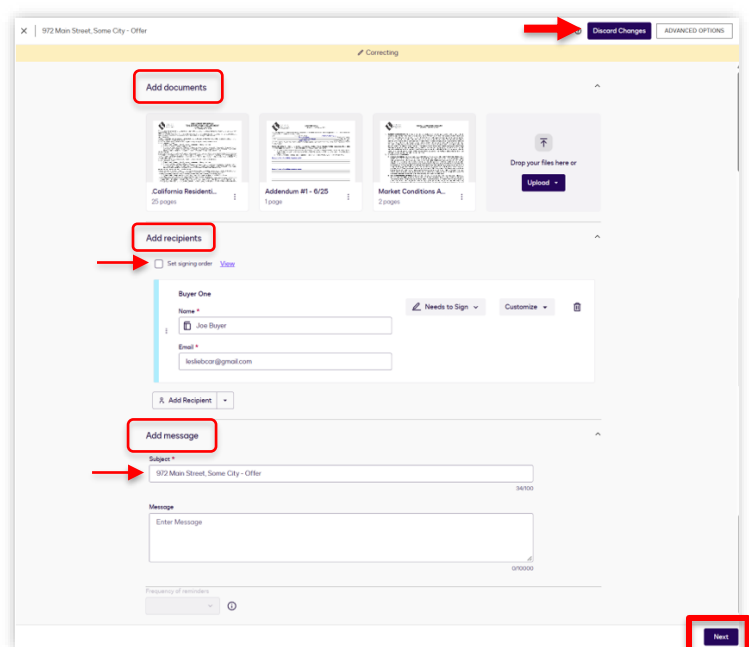
- **Documents** – add, remove, or rearrange the order of forms and documents in the signing packet
- **Recipients** – update signer name and email address, add a signer or CC, and set the signing order
- **Message** – edit the Subject line of the email message the signers receive

5. Click **Next** at the bottom right of the page to continue.

6. (optional) If you no longer wish to make changes to this signing packet, click

Discard Changes

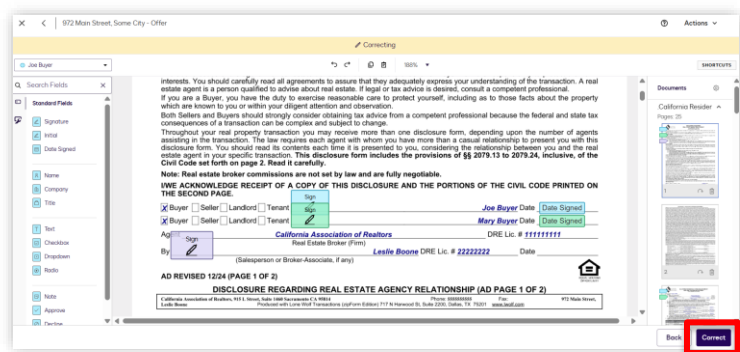
at the top right.



On the final screen, you may add, remove, or edit the placement of tags, if needed.

7. (optional) Click on a tag to open the menu for that tag in the right navigation pane and view available actions.

8. Click **Correct** at the bottom right to send the corrected signing packet to the signers. *New signing invitations will automatically be sent to signers as soon as "Correct" is clicked.*

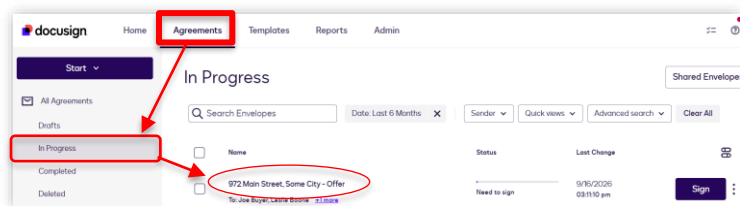


Void a Signing Packet

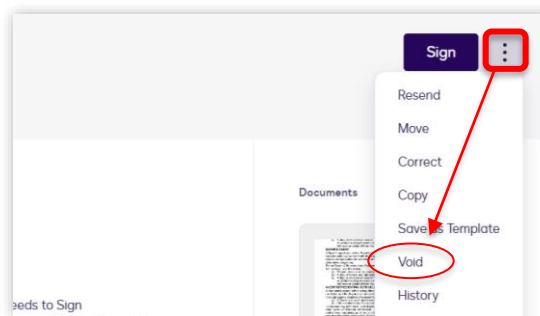
This feature allows you to void a signing packet and cancel all remaining signing activities. Once voided, the packet will no longer be accessible.

1. Click **Agreements** in the top navigation bar.

2. Then, click the **In Progress** folder on the left and select the **name of the signing packet** to open it.



3. Click the **three dots** at the top right and select "Void" from the menu.



4. On the **Void Envelope** window, type a note to the recipients stating why you are voiding the signing packet. This message will be sent to all signers. There is a 200-character limit.

Read the narrative at the top of the window for full details.

5. Click **Void** at the bottom of the window to void the signing packet and send the message to the recipients.

