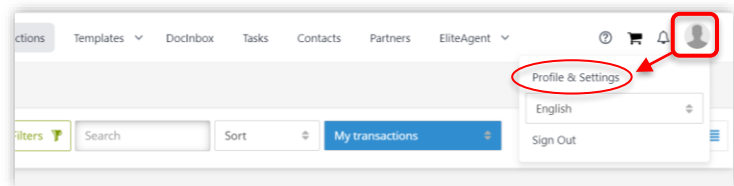


Authentisign is the digital signing service included as a member benefit in your individual zipForm account. Follow the steps in this guide to create and send your signing packet using the new and improved Authentisign.

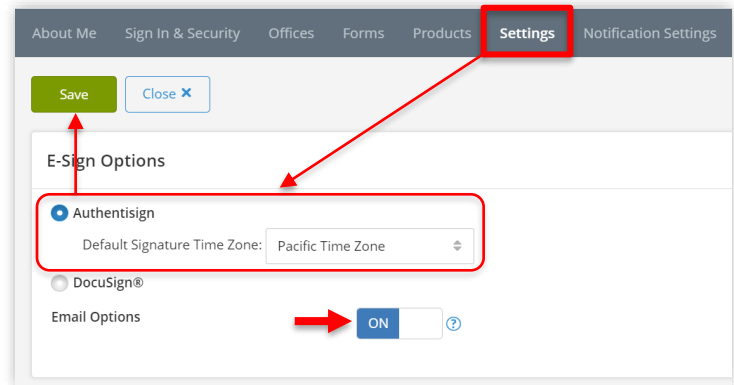
Set your Default Signing Service

It is important to set the default signing service to Authentisign 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, do the following:
 - **Authentisign (New and Improved)** – click the radio button next to Authentisign to set this as your default signing service.
 - **Time Zone** – IMPORTANT! Select “Pacific Time Zone” from the dropdown menu to set the default time zone. This affects the the date/time stamp on the completed signed documents that are returned to your zipForm transaction.
 - **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.
5. Click **Save** at the top left to save your changes.
6. Click **Close** at the top left to exit your profile.

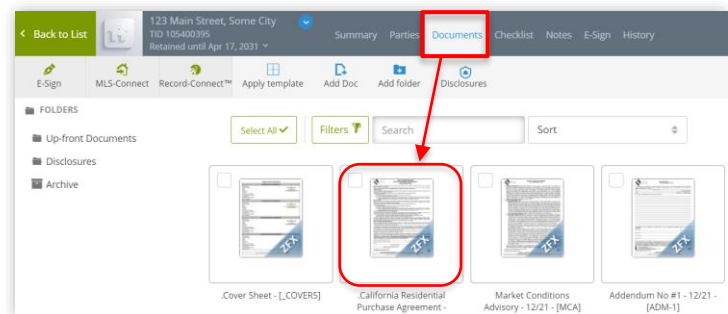


Start a Signing Packet

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.

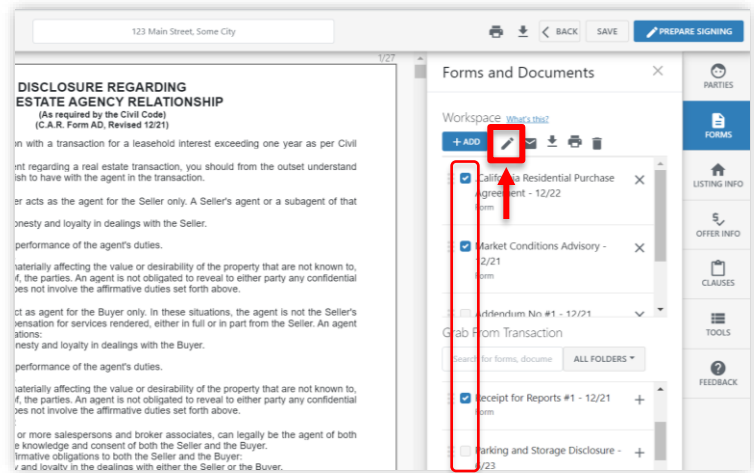


SELECTED FORMS

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.

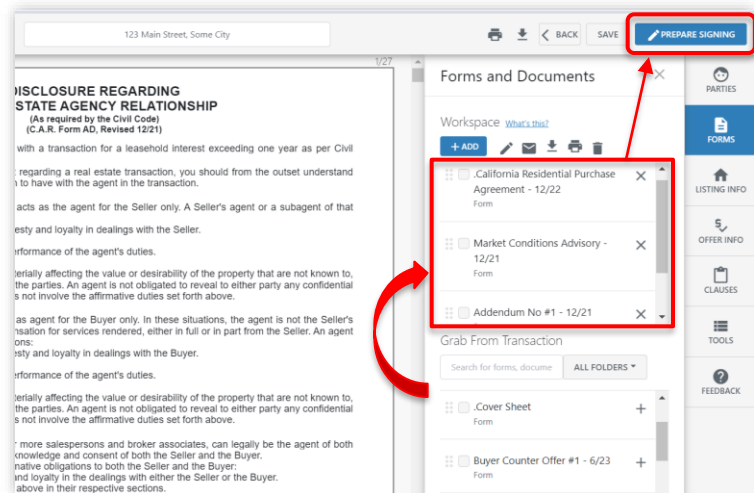


ALL FORMS IN THE WORKSPACE

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  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 participants for signature.

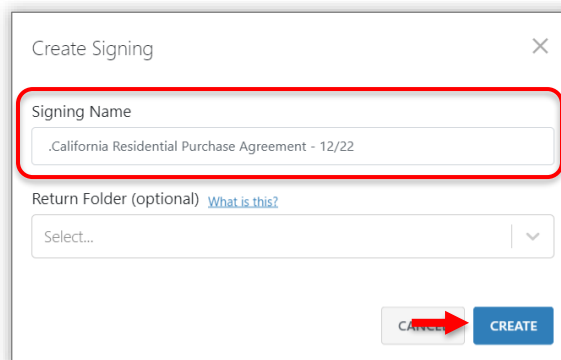
Create Signing

1. (recommended) Edit the **Signing Name**. The Signing Name is the subject line of the email invitation that your participants will receive. It is recommended to edit the Signing Name to indicate the property address and/or the documents being sent for signature.

NOTE: The text cannot be longer than the length of the field on the popup window.

2. (optional) **Return Folder** – 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. Click  to continue.



Signers

Add signing parties or CC.

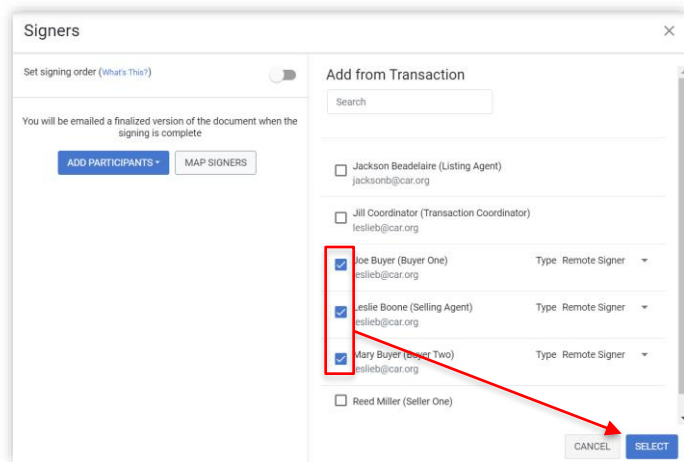
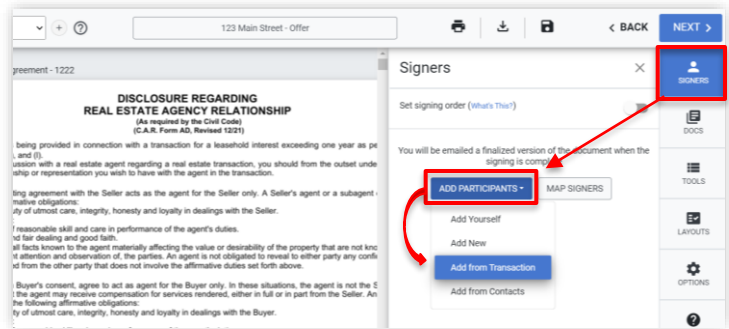
You will automatically land on the **Signers** tab when creating a signing packet.

1. Click **ADD PARTICIPANTS** and select **Add from Transaction** from the dropdown menu.

2. Check the box next to each party who needs to sign documents.

*NOTE: The **Type** defaults to "Remote Signer" for each signer selected. You may change it to "Reviewer" or "CC" if applicable.*

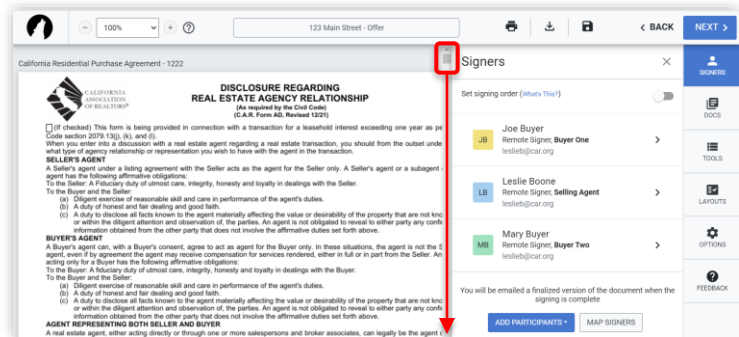
3. Click **SELECT** at the bottom right, and the system will automatically place the signature, date, and initial tags on most documents for you.



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

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

See the **Tools** section below for the steps to place tags manually on documents.



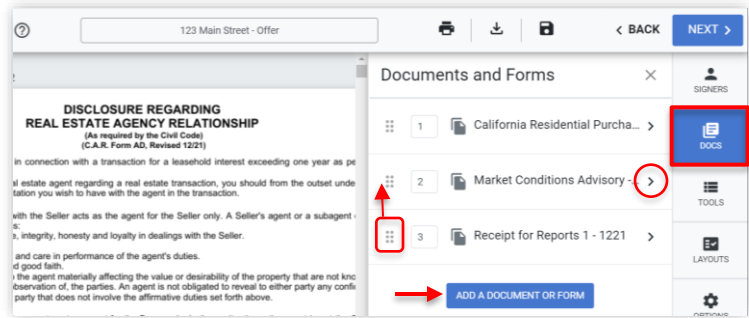
Docs (optional)

Rearrange the order of the documents, remove documents, and add forms and PDF files, if needed.

1. Click **DOCS** on the right side.

2. Click **ADD A DOCUMENT OR FORM** to add a form from your transaction or upload a PDF file.

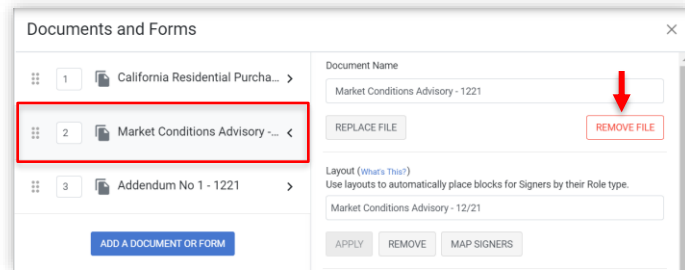
3. To rearrange the order – click and drag the dots to the left of the document name to rearrange the order.



4. To remove a document – click the arrow to the right of the document name, then click

REMOVE FILE

NOTE: This will only remove the document from your signing packet. It will not remove the form from your transaction.



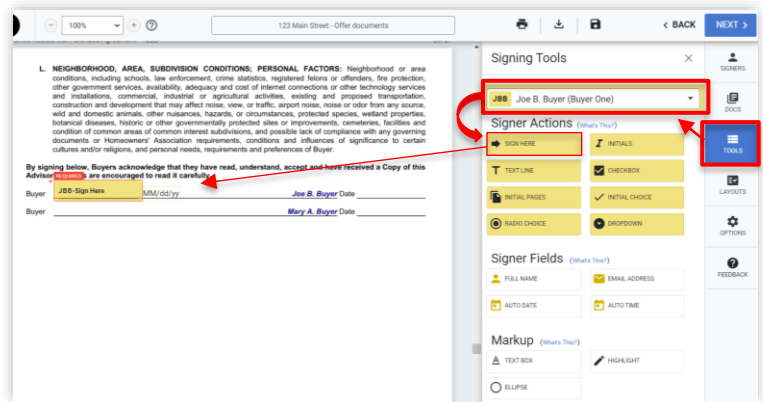
Tools (optional)

Place tags manually for individual signers, if needed.



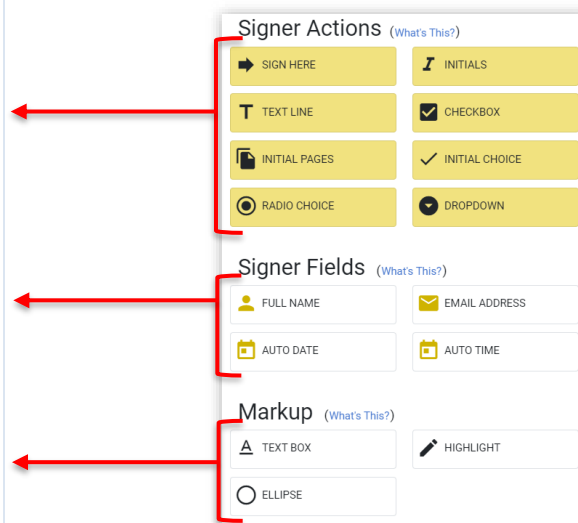
1. Click **TOOLS** on the right side.
2. Select the signer from the dropdown menu at the top.
3. Click and drag a tag from the right side over to the document.

*NOTE: The **Signature** tag will always have the date tag with it. You will need to move the date tag to its proper place on the document.*



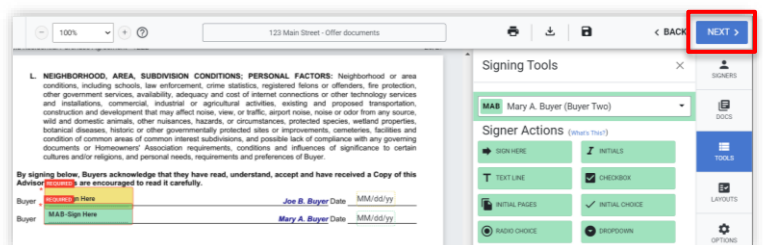
Explanation of Fields:

- **Signer Actions**
 - Click and drag to place on the document.
 - *Signer specific*
 - Requires the signer's interaction to complete.
- **Signer Fields**
 - Click and drag to place on the document.
 - *Signer specific*
 - Does not require interaction from the signer to complete.
- **Markup**
 - Click the markup item, then click on the document where you'd like to place it – *do not* click and drag.
 - *Non-specific*
 - This is information you are placing on the document to be seen by all signers.



Send

1. Click **NEXT >** at the top right when you're ready to send your documents for signature.

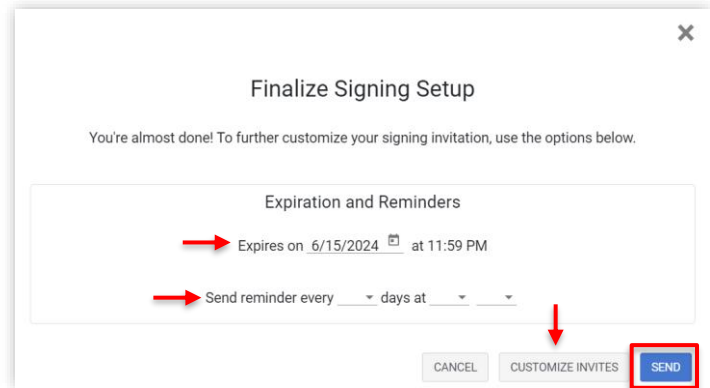


2. (optional) **Expiration** – click the **calendar icon** to set an expiration date for the signing packet. Default is 30 days.

3. (optional) **Reminders** – click the **dropdown arrows** to set the interval days and time to send email reminders to the participants reminding them to sign.

4. (optional) Click **CUSTOMIZE INVITES** to **type a custom message** to each individual participant.

5. Click **SEND** to send the signing packet to the participants for signature. The system will return you to the **Documents** tab in your transaction.



Finalize Signing Setup

You're almost done! To further customize your signing invitation, use the options below.

Expiration and Reminders

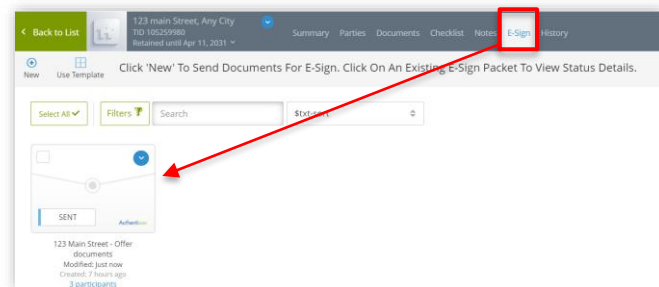
Expires on 6/15/2024 at 11:59 PM

Send reminder every ___ days at ___

CANCEL CUSTOMIZE INVITES **SEND**

Track the Status of a Signing Packet

1. From the **E-Sign** tab inside your transaction, click to open the signing packet you sent for signature.



Back to List 123 Main Street, Any City 100209980 Retained until Apr 11, 2031

Summary Parties Documents Checklist Notes **E-Sign** History

Click 'New' To Send Documents For E-Sign. Click On An Existing E-Sign Packet To View Status Details.

Select All Filters Search \$100,000

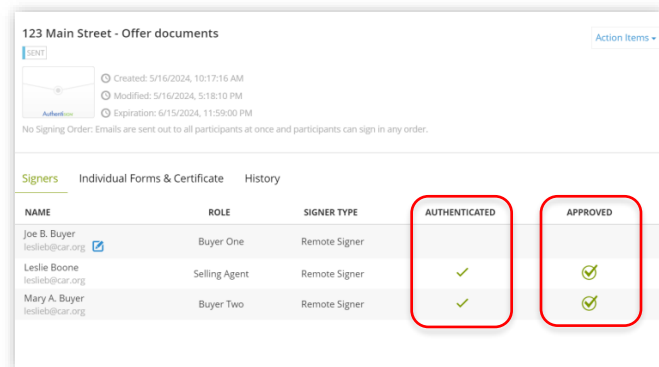
SENT Authentisign

123 Main Street - Offer documents Modified: just now Created: 7 hours ago 3 participants

2. **Authenticated** – a ✓ in this column means the participant has viewed the signing packet.

3. **Approved** – a ✓ in this column means the participant has completed their signing.

4. Click **✕** at the top right to close the window.



123 Main Street - Offer documents Action Items

SENT

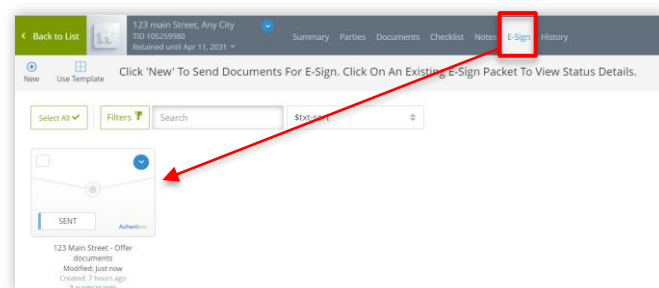
Created: 5/16/2024, 10:17:16 AM
Modified: 5/16/2024, 5:18:10 PM
Expiration: 6/15/2024, 11:59:00 PM

No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer	✓	✓
Leslie Boone leslieb@car.org	Selling Agent	Remote Signer	✓	✓
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer	✓	✓

Edit a Signing Packet

1. From the **E-Sign** tab inside your transaction, click to open the signing packet you sent for signature.



Back to List 123 Main Street, Any City 100209980 Retained until Apr 11, 2031

Summary Parties Documents Checklist Notes **E-Sign** History

Click 'New' To Send Documents For E-Sign. Click On An Existing E-Sign Packet To View Status Details.


Select All Filters Search \$100,000

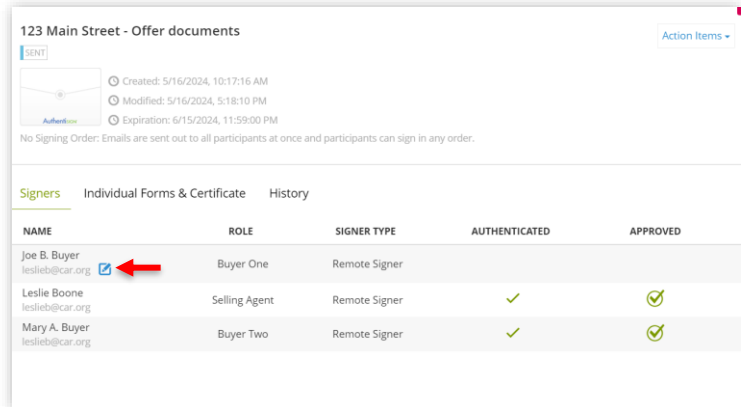
SENT Authentisign

123 Main Street - Offer documents Modified: just now Created: 7 hours ago 3 participants

Edit the Email Address

Edit or correct the email address for participants.

1. Click  to edit the email address for any participant who *has not yet signed* (Approved).



123 Main Street - Offer documents

SENT

Created: 5/16/2024, 10:17:16 AM
Modified: 5/16/2024, 5:18:10 PM
Expiration: 6/15/2024, 11:59:00 PM


No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

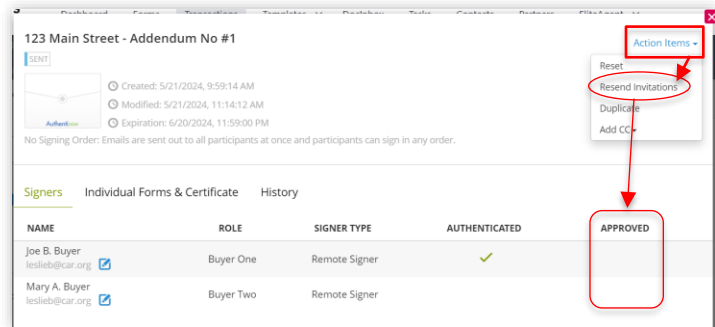
Signers Individual Forms & Certificate History

NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer		
Leslie Boone leslieb@car.org	Selling Agent	Remote Signer	✓	✓
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer	✓	✓

Resend Invitations

Resend signing invitations to participants who have not yet signed.

1. Click  at the top right and select "Resend invitations" to send signing invitations to participants who *have not yet signed*.



123 Main Street - Addendum No #1

SENT

Created: 5/21/2024, 9:59:14 AM
Modified: 5/21/2024, 11:14:12 AM
Expiration: 6/20/2024, 11:59:00 PM


No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

Signers Individual Forms & Certificate History

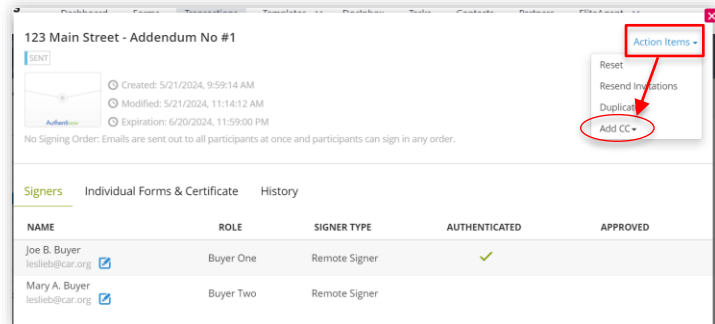
NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer	✓	
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer		

Add CC

Add someone to receive a copy of the signed documents.

1. Click  at the top right, hover over "Add CC", then select "Add New CC" from the dropdown menu.

The cc'd participant will get the email invitation to view documents after all participants have signed.



123 Main Street - Addendum No #1

SENT

Created: 5/21/2024, 9:59:14 AM
Modified: 5/21/2024, 11:14:12 AM
Expiration: 6/20/2024, 11:59:00 PM

No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.


Signers Individual Forms & Certificate History

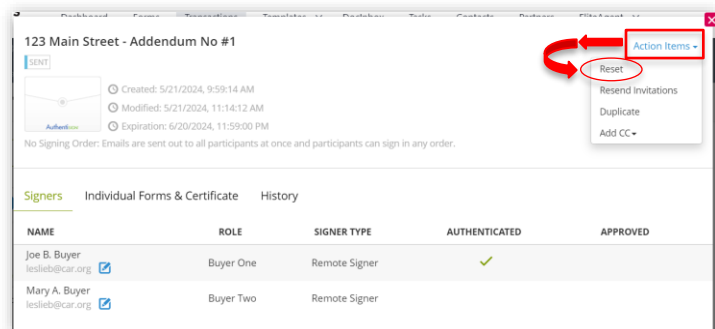
NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer	✓	
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer		

Add and Remove Documents

Reset the signing to return the signing packet to "DRAFT" status to add or remove documents.

IMPORTANT: If you need to *edit the data* on the documents, such as dates, prices, verbiage, etc., you will need to start a new signing packet.

1. Click  at the top right and select "Reset" from the menu.



123 Main Street - Addendum No #1

SENT

Created: 5/21/2024, 9:59:14 AM
Modified: 5/21/2024, 11:14:12 AM
Expiration: 6/20/2024, 11:59:00 PM

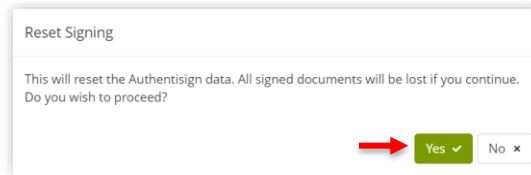
No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

Signers Individual Forms & Certificate History

NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer	✓	
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer		

2. Click to continue.

NOTE: Resetting the signing packet will remove all participant fields from the documents, including signatures and fillable answers, for any participant that has already signed.



Reset Signing

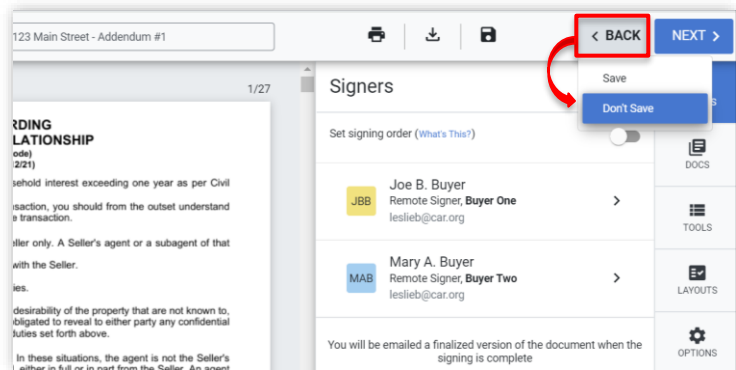
This will reset the Authentisign data. All signed documents will be lost if you continue. Do you wish to proceed?

You will immediately be taken back into the signing packet to make your edits.

3. If you don't want to edit the signing packet

right now, click at the top right and select **Don't Save** from the menu to return the packet to DRAFT status in the E-Sign tab of your transaction.

IMPORTANT: If you need to *edit the data* on the documents, such as dates, prices, verbiage, etc., you will need to start a new signing packet.



123 Main Street - Addendum #1

1/27

Signers

Set signing order (What's This?)

Save

Don't Save

JOBS

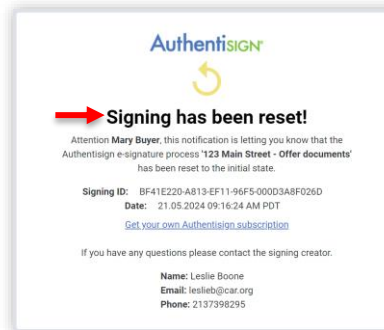
MAB

Joe B. Buyer
Remote Signer, Buyer One
leslieb@car.org

Mary A. Buyer
Remote Signer, Buyer Two
leslieb@car.org

You will be emailed a finalized version of the document when the signing is complete

If any participant starts the signing again from the original email invitation they received, Authentisign will notify the participant that the signing has been reset.



AuthentiSIGN

Signing has been reset!

Attention **Mary Buyer**, this notification is letting you know that the Authentisign e-signature process "123 Main Street - Offer documents" has been reset to the initial state.

Signing ID: BF41E220-A813-EF11-96F5-000D3A8F026D
Date: 21.05.2024 09:16:24 AM PDT
[Get your own Authentisign subscription](#)

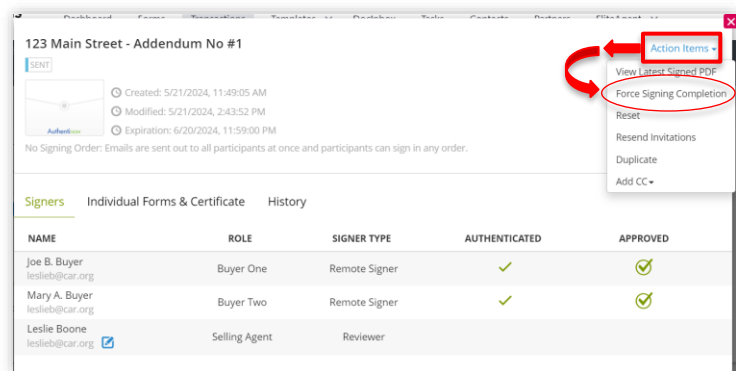
If you have any questions please contact the signing creator.

Name: Leslie Boone
Email: leslieb@car.org
Phone: 2137398295

Force Signing Completion

If at least one participant has completed their signing, then you will have another option on the Action Items menu labeled "Force Signing Completion", which allows you to complete the signing packet and produce a final document with just the participants who have signed.

1. Click at the top right and select "Force Signing Completion" from the menu.



123 Main Street - Addendum No #1

SENT

Created: 5/21/2024, 11:49:05 AM
Modified: 5/21/2024, 2:43:52 PM
Expiration: 6/20/2024, 11:59:00 PM

No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

Signers Individual Forms & Certificate History

NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer	✓	✓
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer	✓	✓
Leslie Boone leslieb@car.org	Selling Agent	Reviewer		

Action Items

View Latest Signed PDF

Force Signing Completion

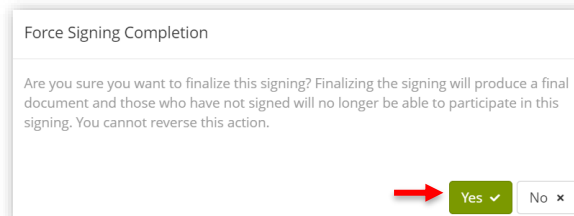
Reset

Resend Invitations

Duplicate

Add CC

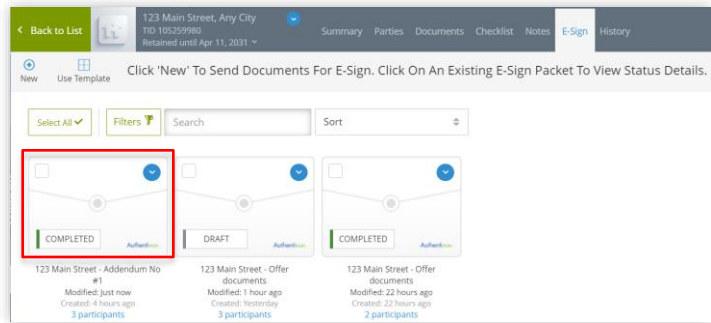
2. Click to continue.



Force Signing Completion

Are you sure you want to finalize this signing? Finalizing the signing will produce a final document and those who have not signed will no longer be able to participate in this signing. You cannot reverse this action.


3. The system will finalize the signing packet and briefly display the status as “SIGNED”, then it will show the status “COMPLETED”.



Delete a Signing Packet – DRAFT

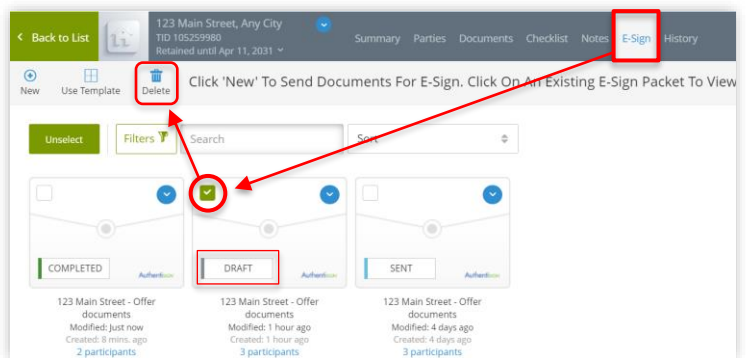
IMPORTANT: Only signing packets with a status of “DRAFT” can be deleted from your transaction.

1. From the **E-Sign tab** inside your transaction, check the box on the signing packet you’d like to delete.

2. Click  in the top toolbar.

Envelope Statuses:


- **DRAFT** – created but not yet sent.
- **SENT** – sent to participants for signature.
- **COMPLETED** – all participants have signed.

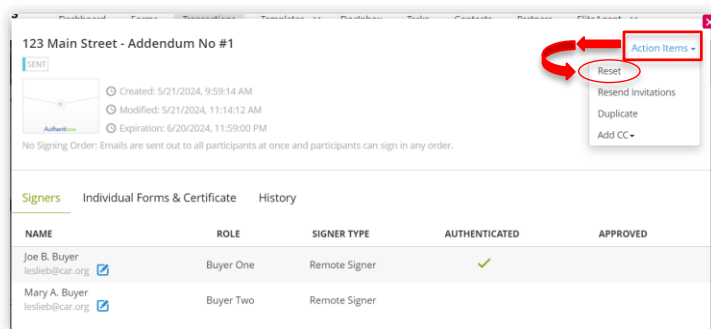
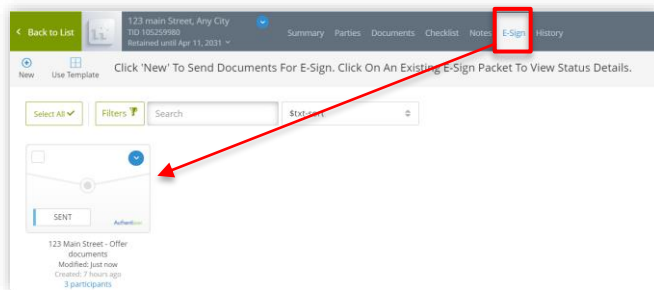


Delete a Signing Packet – SENT

IMPORTANT: Only signing packets with a status of “DRAFT” can be deleted from your transaction. If you need to delete a signing packet you already sent, you will first return the packet to DRAFT status, then delete it.

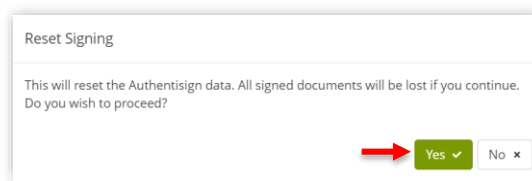
1. From the **E-Sign tab** inside your transaction, click to open the signing packet you sent for signature.

2. Click  at the top right and select “Reset” from the menu.




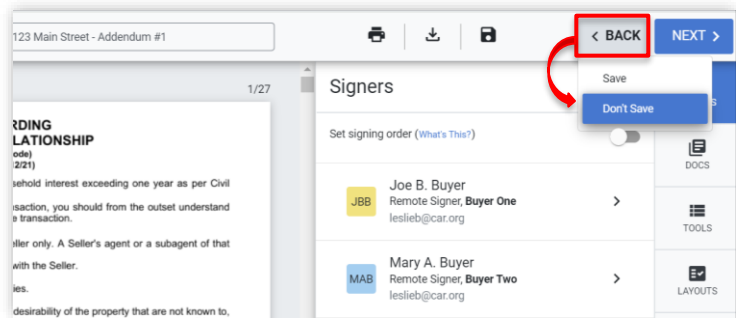
3. Click  to continue.

NOTE: Resetting the signing packet will remove all participant fields from the documents, including signatures and fillable answers, for any participant that has already signed.




You will immediately be taken back into the signing packet.

4. Click  at the top right and select **Don't Save** from the menu to return the packet to DRAFT status in the E-Sign tab of your transaction.



5. From the E-Sign tab inside your transaction, check the box on the signing packet you'd like to delete.

6. Click  in the top toolbar. The signing packet will *immediately* be deleted.

