



1. On the left-hand side of the Transaction Summary tab, select Seller.



2. Make sure that your seller's **First and Last Name** are filled in, as well as their **Email Address**.

Role	Seller One	Street Address	•
First Name	Shaun	City	•
Middle Name		State	•
		County	•
Last Name	Seller	Zip Code	•
Email	ShaunSeller@email.com 👻		
Home Phone	•		
Business Phone	•		
Cell phone	•		
Business Fax	•		
	Cancel × Sav	e 🗸 Clear 🗙	





3. Start the signature process by clicking on the E-Sign button



4. Click New to start a new signature packet

🖓 Da	shboard	🟠 Trans	actions	Templates	✓ Tasks	Contacts	Partners	=
🗸 ВАСК	(় New	Use Template	Click 'I	New' To Send Do	cuments Foi	r Signature. Clio	ck On An Existir	ng E-Si

5. Select the **TDS** and/or **SPQ**, as well as any other documents needing to be signed, then click **Close**

) Tasks	Documents To Sign Select the forms or documents to sign or use Upload to add from an external source	Add external document -	
	DOCUMENT	COMPLETION DUE	
: Signatu	Real Estate Transfer Disclosure Statement - 4/14 - [TDS]		
: DocuSi;	Seller Property Questionnaire - 12/16 - [SPQ]		



6. Add a Packet Name and click Next

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🔗 Dashboard	C Transactions	🗌 Templates 🕖 Tasks 📑 Contacts 🛞 Partners 📼 Shop 🚯 Help	
🕻 ВАСК		3 SELECT FORMS SELECT PARTIES ADD SIGNATURES	NEXT 🗲
	Packet Name:	TDS and SPQ	
	Signing Service:	zipLogix Digital Ink® 🗢	
	Return folder (optional): What is this?	Choose a return folder	
	D.	Select documents to include	
	DOCUMENT	COMPLETION DUE	
	Real Estate Transfer Dis	closure Statement - 4/14 - [TDS]	Ť
\$	Seller Property Question	naire - 12/16 - [SPQ]	1

Select Seller One as a signing party, as well as any other parties that need to sign this packet. Click Close.
Note: Only Seller One will be able to check boxes and type in text boxes.

Create New	2 Transaction Parties	 zipCRM™ Contacts	zipLogix™ Contacts	Service Providers	Tp Top Producer	Google Contacts	Microsoft Contacts	♥! Yahoo Contacts
Search				Q Sort	\$			
	FIRST NA	ME	MIDDLE NAME	LAST NAM	E R	OLE	EMAIL	COMPANY
	Jackson			Beaudelain	e Li	sting Agent	jacksonb@)car.org
	Shaun			Seller	Si	eller One	ShaunSelle om	er@email.c
					Si	eller Two		
					R	eviewed By		
					В	uyer One		
					В	uyer Two		
					S	elling Agent		
				C	lose			





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8. Click **Next**, and you will see that all the **Check Boxes** and **Explanation Text Fields** are ready for your clients to complete. Review the tags and click **Send**.

