

2016
Top
Tips for
REALTORS® using
**zipForm®
Plus**
& zipLogix Digital Ink®

*Work efficiently and accurately with
a seamless integration to document
storage and e-Signatures to manage
transactions from start to finish!*

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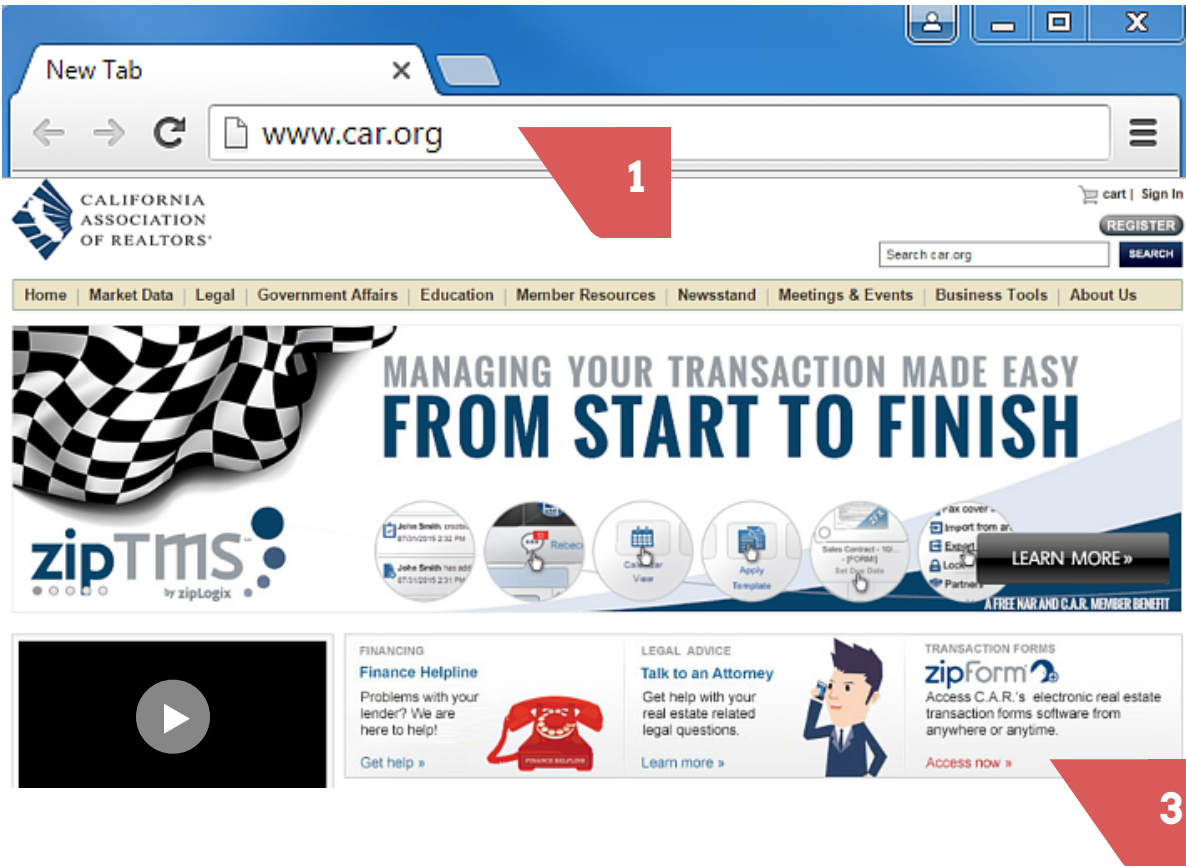


CALIFORNIA
ASSOCIATION
OF REALTORS®

1. Getting Started

Logging In

C.A.R. Members can always access zipForm® Plus by visiting www.car.org from any internet browser!



1. Go to www.car.org
2. Click on **Sign In** at the top of the page and use your C.A.R. credentials to log in.
*First-time users will click **Register** and follow the online instructions.*
3. Once logged in, click **Access Now**. zipForm® Plus will open in a new window.

2. Creating Transactions

Starting a New File

zipForm® **Transaction files** are a set of contracts (C.A.R. forms) for a specific client or property. Transaction information, including **Transaction Parties** and property information, is automatically updated throughout all of the forms in the file as each is completed. This applies to future edits as well and saves time while drafting forms.

The screenshot displays the zipForm Plus web application interface. At the top, the header includes the California Association of Realtors logo and the text "zipForm Plus a FREE C.A.R. member benefit". Below the header is a navigation bar with tabs: TRANSACTIONS, TEMPLATES, TASKS, CONTACTS, PARTNERS, and HELP. The TRANSACTIONS tab is active. Below the navigation bar is a row of icons for various functions: Forms, New, Import, Export, Forms Advisor, Clauses, LookUp Manager, Mortgage Calculator, Vault Statistics, and Create Digital Ink. A red arrow labeled "1" points to the "New" button. Below the icons is a "Transaction Details" form. The form has a "Name:" field with a red arrow labeled "2" pointing to it. Below the name field are two sections: "Transaction Type" with radio buttons for Listing, Purchase, and Lease; and "Property Type" with radio buttons for Residential, Commercial, Industrial, Vacant Land, Multiunit, Farm and Ranch, Condominium, and Manufactured Home. Below these sections is an "Apply Template" dropdown menu with a red arrow labeled "3" pointing to it. Below the dropdown is a "Comments" text area. At the bottom right of the form are "Save" and "Close" buttons, with a red arrow labeled "4" pointing to the "Save" button.


1. Click the **New** button on the **TRANSACTIONS** page.
2. Name your transaction (something easy to find and remember).
3. Use the **Apply Template** drop-down menu if you wish to apply a template.
4. Click **Save**.

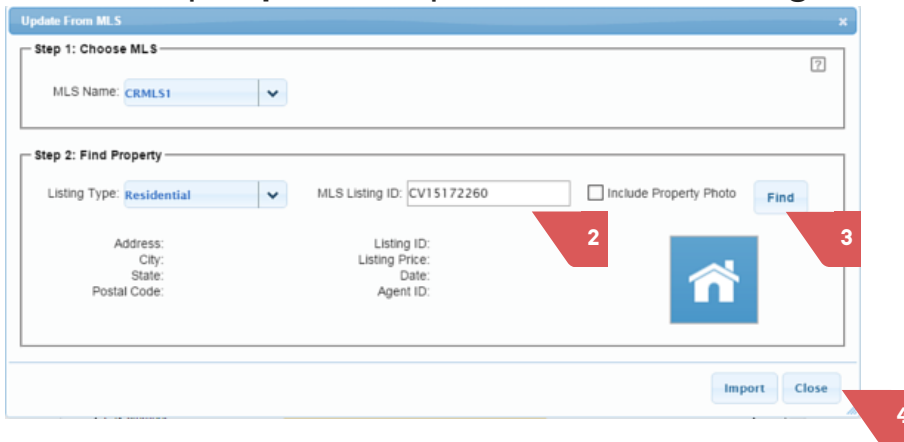
3. Filling Out Forms

zipFormMLS-Connect® and Other Time-saving Tools

Transaction forms can be completed by filling out blank fields manually or by using the different shortcuts found throughout **zipForm® Plus**. Key information entered on the forms automatically flows between all of the forms in the file. This includes client names, contact information, property address, and agent information.

- **zipFormMLS-Connect®** auto populates listing information from your MLS straight into your transaction.

1. While editing any form, click or tap the  **MLS-Connect®** button. *If required, insert your MLS ID and password.*
2. Select a **Listing Type** and provide the MLS number for the property.
3. Click or tap **Find** and the listing information will populate for review.
4. Click or tap **Import** to duplicate this info throughout the transaction.



- **Utilizing Text Overflow**

The RPA-CA will automatically place any surplus text you are typing, if you run out of room, into a **Text Overflow Addenda** (C.A.R. TOA).

1. Type/paste your text in a text field like **example**: Section 3E.

E. ADDITIONAL FINANCING TERMS:

2. Click **Save as PDF** from the tools above the form.



3. A new PDF copy of the RPA will appear in the Transaction with an additional page attached at the end that includes your surplus text.



Note:

The original field you were typing in will display a footnote to "See Text Overflow Addendum" which will be attached at the end of this PDF.

TOA is also used in sections:

5(A)
6
7(A1-A3)
8(B-C).

- **Service Providers** are conveniently listed for you while using zipForm® Plus. While completing **Natural Hazard Zone** fields or **Warranty** fields, click on the drop-down arrow to see what services are available and your client can choose the vendor he or she desires.

Example 1. Section 4, Item A4 of RPA

Example 1 shows a dropdown menu for 'Disclosure Source' in Section 4, Item A4 of RPA. The menu lists several options: 'MyNHD \$74.95', 'Disclosure Source', 'First American Natural Hazard Disclosure', and 'JCP-LGS Disclosures.com'. A red arrow labeled '1' points to the dropdown arrow.

Example 2. Section 4, Item D6 of RPA

Example 2 shows a dropdown menu for 'Old Republic Home Protection' in Section 4, Item D6 of RPA. The menu lists several options: 'Fidelity National Home Warranty' and 'First American Home Buyers Protection'. A red arrow labeled '2' points to the dropdown arrow.

- **Attaching Photos to a Form** can be done inside any document in zipForm® Plus and zipForm® Mobile. Provide valuable information to all transaction participants with quick and easy visual reference.

The screenshot shows the zipForm Plus interface with the 'Attach Photo' button highlighted. A 'Right Click' context menu is open, showing options like 'Attach photo', 'Show all photos', 'Hide all photos', 'Delete all photos', and 'Detach all photos'. A red arrow labeled 'Caption' points to the 'Caption' field in the 'Edit Attached Photos' dialog.

Photos will appear as an extra page on the document you add them to and as a clickable, mobile tag for reference. They are included when you Print, Email, Save as PDF, eSign, or Collaborate with this form.

● Add Forms Automatically: Smart Form Features Guide for RPA-CA

If a box on a form is checked indicating the inclusion of a different form in the transaction, then zipForm® Plus will import that form into the transaction automatically, while you continue to work on the initial form. If the box is then unchecked by the user, zipForm® Plus will still leave the new form included.

Auto Add Addenda

For example, on Section 5B (Addenda and Advisories) of the RPA, if you mark an “X” for the Statewide Buyer and Seller Advisory (SBSA), this form will be automatically added to the transaction. If you remove the “X” from section 5B, the SBSA will not be removed from the transaction. Users will need to remove it manually from their transaction’s forms list.

Other sections where auto-add addendum is used are:

- Section 3 (D) – Seller Financing
- Section 4 – Sale of Buyer’s Property
- Section 5 – Addenda and Advisories
- Section 9 (C & D) – Closing & Possession
- Section 31 – Expiration of Offer
- Section 32 – Acceptance of Offer

Mutually Exclusive Checkboxes

Users can avoid incorrectly checking multiple boxes in a particular section of the RPA with this new feature. For example, in paragraph 2B the Listing Agent cannot simultaneously represent the seller exclusively and also represent both the buyer and seller. Or if All Cash is selected in section 3C, then sections H, I, and J are disabled related to loan information.

Sections where the mutual exclusive feature is used are:

1. Paragraph 2B:
 - a. Immediately below the line beginning with the words “Listing Agent,” the boxes for “the Seller exclusively” and “both the Buyer and Seller” are mutually exclusive
 - b. Immediately below the line beginning words “Selling Agent,” the boxes for “the Buyer exclusively” and “the Seller exclusively” and “both the Buyer and Seller” are mutually exclusive
2. Paragraph 3A(1): in the second line the boxes for “cashier’s check” and “personal check” and “other” are mutually exclusive
3. Paragraph 3A (2): if the box for this paragraph is checked, all of the fields and boxes in 3A (1) should be disabled.
4. Paragraph 3C: if the box for this paragraph is checked, all of the fields and boxes for paragraph 3D, 3H and 3J should be disabled.
5. Paragraph 3D(1): the boxes for “FHA” and “VA” and “Seller financing” and “assumed financing” and “Other” are mutually exclusive
6. Paragraph 3D(2): the boxes for “Seller financing” and “assumed financing” and “Other” are mutually exclusive
7. Paragraph 3H: if the box for “Verification attached” is checked, the field for “3 (or ___) Days” should be disabled
8. Paragraph 3I: if the box for “(or ___ is NOT)” is checked, the field for “17(or ___)Days” should be disabled
9. Paragraph 3J(1): if the box for “Letter attached” is checked, the field for “3 (or ___) Days” should be disabled
10. Paragraph 7B(1): the boxes for “Buyer” and “Seller” are mutually exclusive
11. Paragraph 7B(2)(i): the boxes for “Buyer” and “Seller” are mutually exclusive
12. Paragraph 7B(2)(ii): the boxes for “Buyer” and “Seller” are mutually exclusive
13. Paragraph 7D(9)
 - a. The boxes for “Buyer” and “Seller” are mutually exclusive
 - b. If the box for “OR [] Buyer waives ...” is checked, the remaining boxes and fields in 7D (9) should be disabled.
 - c. If either box for “Buyer” and “Seller” is checked, then the box for “OR [] Buyer waives ...” should be disabled.
14. Paragraph 9B:
 - a. In 9B(i), the boxes for AM and PM are mutually exclusive
 - b. In 9B(iii), the boxes for AM and PM are mutually exclusive
 - c. If any box or field in (i) is completed then all boxes and fields for (ii) and (iii) should be disabled
 - d. If any box or field in (ii) is completed then all boxes and fields for (i) and (iii) should be disabled
 - e. If any box or field in (iii) is completed then all boxes and fields for (i) and (ii) should be disabled
15. Paragraph 9C: the boxes for “CAR Form SIP” and “CAR Form RLAS” are mutually exclusive
16. Paragraph 9D: if the box for “OR [] Tenant to remain ...” is checked, the field for “5(or ___)” should be disabled
17. Paragraph 31: the boxes for AM and PM are mutually exclusive
18. On page 10: Paragraph beginning with “(____/____) (Do not initial ...” below signatures following paragraph 32, the boxes for AM and PM are mutually exclusive
19. In the Escrow Holder box on page 10, boxes for Department of Business Oversight, Department of Insurance and Bureau of Real Estate are mutually exclusive

● Parties Tab

Contacts for the Transaction you're working on are streamlined with the **Parties** and **Property** tab. Enter the individual's information in here and watch it flow through the transaction forms.

1. Click the **Parties** tab inside your transaction.
2. Click the **New** button to add a party manually.
3. Select a **Party Type** and enter the required information.
4. Click **Save**.

Click **Add Contact to add someone from your zipForm® **Contacts** page.*

The screenshot shows the 'Transaction Party' form in a web application. The interface includes a top navigation bar with tabs: Documents, Parties (highlighted), Contact, Services, and History. Below the navigation bar, there are buttons for '+ New', 'x', and 'i'. A sidebar on the left displays the profile of 'GUADYS PEREZ, Listing Broker, CENTURY 21 CITRUS REALTY INC'. The main form area is titled 'Transaction Party' and features a dropdown menu for 'Buyer One' (callout 3). To the right of this dropdown are 'Import' and 'Add Contact' buttons (callout 4). The form contains several input fields: 'Role' (set to 'Buyer One'), 'Street Address', 'City', 'State', 'County', 'Zip Code', 'Email', 'Business Fax', 'First Name', 'Middle Name', 'Last Name', 'Full Name', 'Home Phone', 'Business Phone', and 'Cell Phone'. A 'Save as Contact' checkbox is located below the phone fields. At the bottom right, there is a 'Save' button (callout 4) and an 'Add Photo' button with a person icon. A red asterisk icon is also visible on the right side of the form.

● Property Tab

This tab helps fill out property information without distraction by removing the verbiage from forms that have relevant property fields.

1. Click the **Property Tab** inside your transaction.
2. Upload the property picture.
3. Complete the fields thoroughly.
4. Click **Save**.

The screenshot shows the 'Property' tab selected in the top navigation bar. Below the navigation bar, there are three icons: a floppy disk labeled 'Save' (callout 4), a house with a plus sign labeled 'Transaction Info' (callout 1), and an information icon. To the right, there is a blue house icon labeled 'Add Photo' (callout 2). The main form area contains several input fields: 'MLS Number', 'Street Address', 'City', 'Township', 'County', and 'State'. Each field has a dropdown arrow on the right side (callout 3). A red triangle with the number 1 points to the 'Property' tab in the navigation bar.

● History Tab

View the log of all the activity in your Transaction with the **History Tab**. Find when forms were changed, faxed, or emailed using this tab.

The screenshot shows the 'History' tab selected in the top navigation bar. Below the navigation bar, there is a search bar labeled 'Enter Keyword(s)' and a 'Sort' dropdown menu. The main area displays a list of transaction activities, each with a blue icon, a description, and a timestamp. The activities are: 'Nate Osollo has updated the transaction details.' (02/12/2016 4:36 PM), 'Nate Osollo has added the form "RPA Financing Worksheet"..' (02/12/2016 1:13 PM), 'Nate Osollo has added the form "Seller Failure to Deliver Documents"..' (02/05/2016 2:46 PM), 'Nate Osollo has added the form "Charges for Required Homeowner Association Documents - 11/14"..' (02/05/2016 2:46 PM), and 'Nate Osollo has added the form "4_Homeowner's Guide to Earthquake Safety"..' (02/05/2016 2:41 PM). A 'Show More' link is visible next to the first activity.

4. Storage & Organization

Document Storage Inside zipForm® Plus

zipForm® transaction files save automatically for 14 months. Adding documents to your file also activates **zipVault®** and it's extended storage up to 5 years or customized expiration dates.

● zipVault® Extended Storage Features



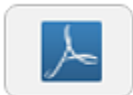
Add Document

Click this button to upload a file from your computer.



Send

Email or Fax any document(s) to your colleagues or clients.



Save as PDF

Create PDF versions of any form(s) in your transaction.



Collaborate

Give editing or viewing access to other zipForm® users.



Listing, Residential
Modified Just now
Expires

Wed Dec 16 2020

Expiration Date

Transaction Files will be available until you delete them or until they expire (whichever comes first).



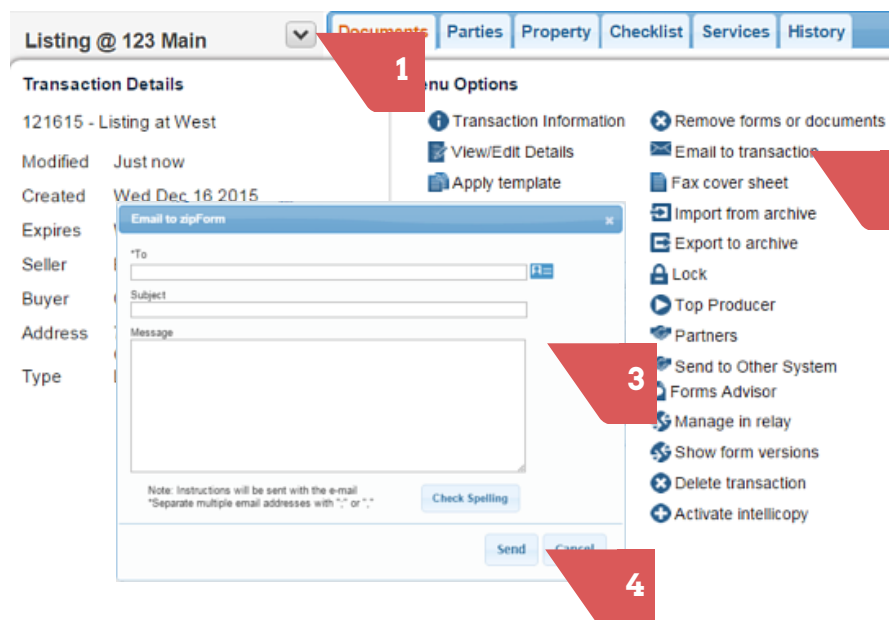
Signed 1/5
10:21:24am

Signed Forms

Any documents that have been signed will always automatically be saved in a new folder inside your transaction. This folder will show the Date and Time these forms were signed.

● Email Directly into zipForm®

zipForm® users and others can insert documents, files, and signed forms straight into your Transaction via email. Inside any transaction:

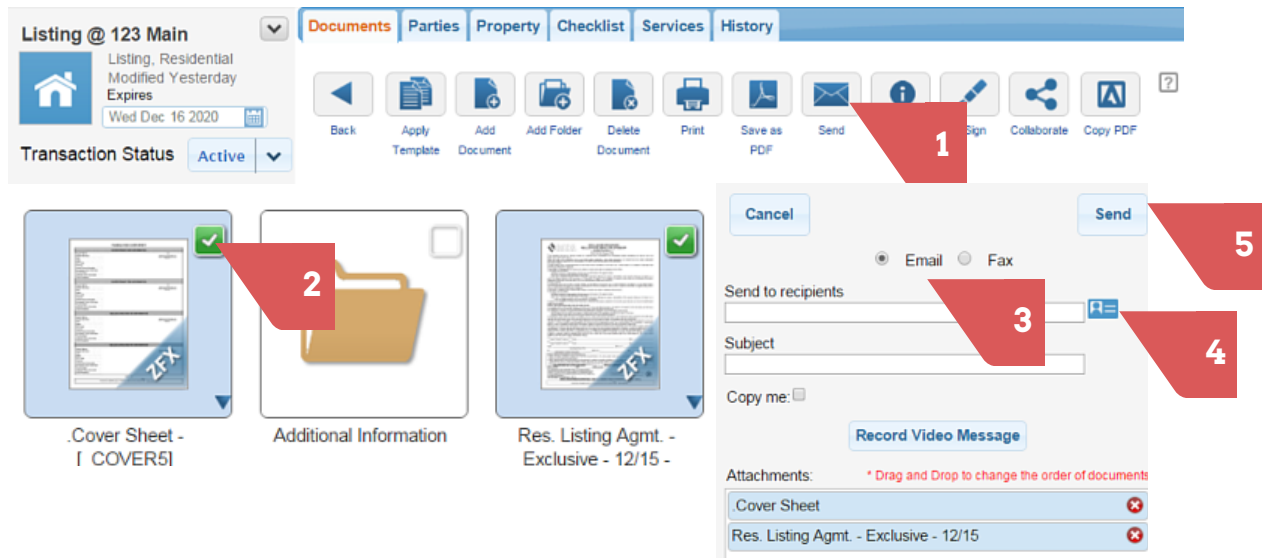


1. Click the file's drop-down arrow.
2. Select **Email to Transaction**.
3. Enter email information.
4. Click **Send** and advise clients to follow the instructions in the email.

● Send Documents via Email or Fax

Email or fax any document you're working on directly from zipForm®.

1. Click the **Send** icon on your toolbar.
2. Select the forms you wish to send.
3. Click and choose to either **Email** or **Fax**.
4. Enter in client information manually or use your **Contacts** shortcut.
5. Click the **Send** button.



● Set Due Dates/Tasks and Stay On Schedule with zipTMS™

The zipTMS™ Tasks menu helps track deadlines, complete contracts, and manage important events one easy location.

TASKS

Select **New Task** while in **Tasks** (or **Checklist** inside a transaction) and edit the features below:

1. Task Name
2. Where to assign the task
3. Required/Status
4. Comments if any
5. Deadline
6. Attach relevant forms, if any

5. Tips & Tricks

Customize Your Account and Make It Your Own

Customize your account before you start creating transactions or emailing to save time and create consistency. All this can be maintained inside your profile under **About Me**.

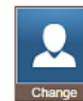
● Add Your Photo

Brand all your emails from zipForm® by adding a photo at any time.

1. Click on your name, the drop-down arrow, or the avatar placeholder in the top right corner.



2. In the profile information window that opens, click on the avatar icon labeled "**Change**" and upload a desired photo.



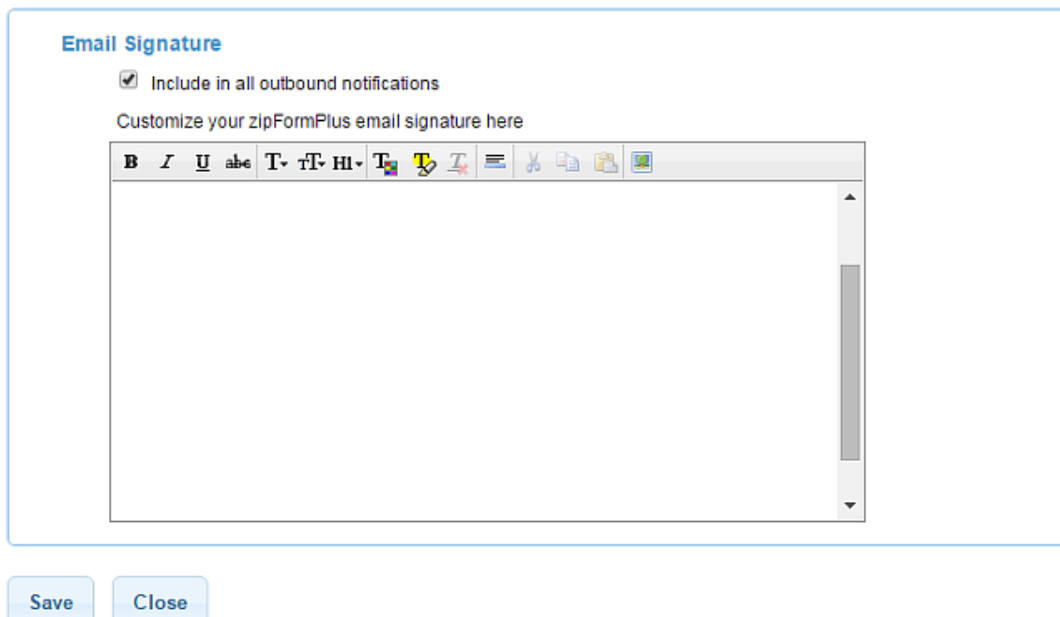
BONUS: Avatars can be changed any time in the **About Me** section by clicking on the photo itself or the links below it.

● Email Signatures

1. Click on your name, the drop-down arrow, or the avatar placeholder in the top right corner.



2. Click **View Profile**, scroll down to the Email Signature window to begin making changes. Remember to click **Save** when finished.



● How to Add Contacts

The **Contacts** tab in zipForm® organizes contact information used for filling out forms, emailing, faxing, or even sending documents for signatures. The **Import/Export** buttons help transfer CSV or Vcard contact list files to and from other contact systems (Outlook, Gmail).

1. Click on **Contacts**.
2. Click on **New**.
3. Select a **Category**, or click and type to create a new category.
4. Enter agent information manually and click **Save**.

BONUS: Import a Contact File with the **Import Contact** button at the bottom of this window.

The screenshot shows the 'CONTACTS' tab selected in the top navigation bar. Below the navigation bar, there are buttons for 'New' (marked with a red '2'), 'Delete', and 'Import'. A search bar labeled 'Enter Keyword(s)' and a 'Sort' dropdown are also visible. The 'Add Contact' form is open, showing a list of existing contacts on the left and a form for adding a new contact on the right. The form includes fields for 'Category' (marked with a red '3'), 'Prefix', 'Suffix', 'First Name', 'Middle Name', 'Last Name', 'Company Name', 'Email', 'Home Phone', 'Home Fax', 'Business Phone', 'Business Fax', 'Mobile Phone', 'Web Page', 'City', 'State' (a dropdown menu), 'Zip Code', and 'Notes'. There is an 'Add Photo' button and an 'Import Contact' button at the bottom right. A red '4' is placed near the 'Save' and 'Cancel' buttons at the bottom of the form.

● Create Time-Saving Templates

Templates represent packets of forms with information you frequently use that can be applied to a transaction file to save time. Click on the **Templates** tab, click the **New** button, name the Template and select the **Template Type**, **Property Type**, and **Save**. Add forms, fill out the forms as you see fit so it's ready apply to a Transaction (see **Section 2**).

The screenshot shows four template cards arranged in a 2x2 grid. Each card has a colored square icon with a white letter, followed by the template name, type, and modification time.

- Condo @ 123 Main St Template**: Listing, Condominium, Modified 1 minute ago. Icon: Green square with white 'C'.
- Residential @ 123 Main... Template**: Listing, Residential, Modified 1 minute ago. Icon: Green square with white 'R'.
- Commercial @ 123 Mai... Template**: Listing, Commercial, Modified 19 minutes ago. Icon: Blue square with white 'C'.
- Vacant Lot @ 123 Main... Template**: Listing, Vacant Land, Modified 20 minutes ago. Icon: Gray square with white 'V'.

● Using the Forms Button



If you need to quickly reference a form but don't want to save an entire transaction, use the **Forms** button. Forms can be selected from the **All Forms** menu on the right.

Bonus: Click the **Select Library** drop-down menu to use other C.A.R.-related forms and worksheets: Sample Letters, Foreclosure Prevention, BRE Forms, and more.

● Using Forms Advisor™



Curious about which forms to use in a transaction? Answer the questions from **Forms Advisor™** pertaining to clients, property, and the transaction, to get recommended forms.

1. Click the **Forms Advisor™** button in the Transaction screen to start.
2. Click **Create New** and/or select a **Transaction Phase** on the left.
3. Answer each question appropriately.
4. Select **Accept Selected Items** after each section.
5. Under **Summary/Get Forms** tab click **I Accept** to confirm answers.
6. Click **Get Recommended Forms** to review.
7. Click **Create New Transaction** (name the file) or **Apply to Existing**.

The screenshot shows the Forms Advisor™ interface. At the top is a toolbar with icons for Forms, New, Delete, Import, Export, Forms Advisor (labeled 1), LookUp Manager, Mortgage Calculator, Vault Statistics, and Create Digital Ink. The main window has a 'Forms Advisor™' title bar with 'Help | Print | Close' links. Below the title bar are tabs: 'Me', 'Property', 'My Client', 'Transaction', and 'Summary/Get Forms'. The 'Transaction' tab is active. On the left, there's a 'File List' section with a 'Select...' dropdown and a 'Create New...' button (labeled 2). Below this is a 'Transaction Phase' list with options: Purchase, Buyer Representation (selected), Listing, Offer, Post Contract / Escrow, Cancel, Lease, and Other. The main area contains a series of questions with radio button answers. Question 1: 'Who do you represent?' with 'buyer exclusively' selected. Question 2: 'Are you the agent a member of the MLS?' with 'YES' selected. Question 3: 'Are you confirming or changing the compensation promised in the MLS listing?' with 'YES' selected. Question 4: 'Is there a co-listing or have two brokers agreed to work with the same buyer?' with 'NO' selected. Question 5: 'Do two licensees in the same office have an agreement to work with same buyer or seller?' with 'NO' selected. Below the questions are buttons for 'Accept Selected Items' (labeled 4) and 'Restore Previous Choices...'. At the bottom right, there's a button labeled 'I Accept' (labeled 5). Below the questions is a section titled 'Get Recommended Forms (31)' (labeled 6) which contains a table of recommended forms. The table has columns for a status icon, a form name, and a document icon. The forms listed are: SPT (Notice of Y... - 10/05), TC• (Transaction Checklist - 1/06), TDS required (Real Estate Transfer Disclosure Statement - 4/14), and WHSD• required (Water Heater and Smoke Detector Statement of Compliance - 11/10). At the bottom of the table are buttons for 'Select/Clear All' and 'Create New Transaction/Apply to Existing' (labeled 7).

Status	Form Name	Document Icon
✓	SPT Notice of Y... - 10/05	[Icon]
✓	TC• Transaction Checklist - 1/06	[Icon]
✓	TDS required Real Estate Transfer Disclosure Statement - 4/14	[Icon]
✓	WHSD• required Water Heater and Smoke Detector Statement of Compliance - 11/10	[Icon]

● Forms Tutor (inside Forms Advisor™)



While Forms Advisor™ supplies you with each form you may need during a transaction, Forms Tutor® is available with information and explanations for each document. Click on the Forms Tutor® icon on your list of Recommended Forms from Advisor and find out what functions and relevance each form has. Use the key and navigation buttons to listen or read various explanations for forms.

FORM: AD

PAGE

→ Page 1 ▼

ZOOM

+ - 100% ▼

MOVE

◀ ▶ ▲ ▼

RESET

↺

DISCLOSURE REGARDING
REAL ESTATE AGENCY RELATIONSHIPS

(As required by the Civil Code)
(C.A.R. Form AD, Revised 4/06)

When you enter into a discussion with a real estate agent regarding a real estate transaction, you should from the outset understand what type of agency relationship or representation you wish to have with the agent in the transaction.

SELLER'S AGENT

A Seller's agent under a listing agreement with the Seller acts as the agent for the Seller only. A Seller's agent or a subagent of that agent has the following affirmative obligations:

To the Seller:

- A fiduciary duty of utmost care, integrity, honesty and loyalty in dealings with the Seller.

To the Buyer and the Seller:

- (a) Diligent exercise of reasonable skill and care in performance of the agent's duties.
- (b) A duty of honest and fair dealing and good faith.
- (c) A duty to disclose all facts known to the agent materially affecting the value or desirability of the property that are not known to, or within the diligent attention and observation of, the parties.

An agent is not obligated to reveal to either party any confidential information obtained from the other party that does not involve the affirmative duties set forth above.

BUYER'S AGENT

A selling agent can, with a Buyer's consent, agree to act as agent for the Buyer only. In these situations, the agent is not the Seller's agent, even if by agreement the agent may receive compensation for services rendered, either in full or in part from the Seller. An agent acting only for a Buyer has the following affirmative obligations:

To the Buyer:

- A fiduciary duty of utmost care, integrity, honesty and loyalty in dealings with the Buyer.

To the Buyer and the Seller:

- (a) Diligent exercise of reasonable skill and care in performance of the agent's duties.
- (b) A duty of honest and fair dealing and good faith.
- (c) A duty to disclose all facts known to the agent materially affecting the value or desirability of the property that are not known to, or within the diligent attention and observation of, the parties.

An agent is not obligated to reveal to either party any confidential information obtained from the other party that does not involve the affirmative duties set forth above.

AGENT REPRESENTING BOTH SELLER AND BUYER

A real estate agent, either acting directly or through one or more associate licensees, can legally be the agent of both the Seller and the Buyer in a transaction, but only with the knowledge and consent of both the Seller and the Buyer.

In a dual agency situation, the agent has the following affirmative obligations to both the Seller and the Buyer:

- (a) A fiduciary duty of utmost care, integrity, honesty and loyalty in the dealings with either the Seller or the Buyer.
- (b) Other duties to the Seller and the Buyer as stated above in their respective sections.

In representing both Seller and Buyer, the agent may not, without the express permission of the respective party, disclose to the other party that the Seller will accept a price less than the listing price or that the Buyer will pay a price greater than the price offered.

The above duties of the agent in a real estate transaction do not relieve a Seller or Buyer from the responsibility to protect his or her own interests. You should carefully read all agreements to assure that they adequately express your understanding of the transaction. A real estate agent is a person qualified to advise about real estate. If legal or tax advice is desired, consult a competent professional.

Throughout your real property transaction you may receive more than one disclosure form, depending upon the number of agents assisting in the transaction. The law requires each agent with whom you have more than a casual relationship to present you with this disclosure form. You should read its contents each time it is presented to you, considering the relationship between you and the real estate agent in your specific transaction.

This disclosure form includes the provisions of Sections 2079.13 to 2079.24, inclusive, of the Civil Code set forth on page 2. Read it carefully.

I/WE ACKNOWLEDGE RECEIPT OF A COPY OF THIS DISCLOSURE AND THE PORTIONS OF THE CIVIL CODE PRINTED ON THE BACK (OR A SEPARATE PAGE).

Buyer/Seller _____ Date _____ Time _____ AM/PM

Buyer/Seller _____ Date _____ Time _____ AM/PM

Agent _____ DRE Lic. # _____

By _____ (Salesperson or Broker-Associate) _____ DRE Lic. _____ Date _____

THIS FORM SHALL BE PROVIDED AND ACKNOWLEDGED AS FOLLOWS (Civil Code § 2079.14):

- When the listing brokerage company also represents Buyer, the Listing Agent shall have one AD form signed by Seller and one signed by Buyer.
- When Buyer and Seller are represented by different brokerage companies, the Listing Agent shall have one AD form signed by Seller and the Buyer's Agent shall have one AD form signed by Buyer and one AD form signed by Seller.

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AD REVISED 4/06 (PAGE 1 OF 2) PRINT DATE _____

Reviewed by _____ Date _____

DISCLOSURE REGARDING REAL ESTATE AGENCY RELATIONSHIPS (AD PAGE 1 OF 2)

EXPLANATIONS

INSTRUCTIONS

Key

- See the explanation of a term or phrase
- See an important note
- Hear the explanation of a section
- Go to the next page
- ← Go to the previous page
- Page 1 ▼ Go to a specific page
- + Increase the size of the form
- Decrease the size of the form
- 100% ▼ Increase the form to specific size
- ◀ Move the form left
- ▶ Move the form right
- ▲ Move the form up
- ▼ Move the form down
- To manually move the form click and hold your mouse on the form and drag it to desired position
- Return the form to its default size and position
- ☒ Close the Instructions/Explanations window
- ☐ Open the Instructions/Explanations window

Explanations

Instructions

Toggle between Instructions window & the Explanation window

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6. zipLogix Digital Ink®

Easy and Free eSignatures Inside zipForm® Plus

eSigning reduces signing errors, saves time, and money. Complete signing tasks quickly and avoid printing, faxing, and paper entirely.

● How to Send a Document for Signatures

1. Open a zipForm® transaction.
2. Click the **eSign** button.
3. Choose **Sign** from the drop-down menu.
4. Select the zipForm® documents and PDF forms you want to send.



5. Click on **Next**.

	First Name*	Middle Name	Last Name*	Role*	Email*	Company
<input checked="" type="checkbox"/>	Cesar		Cervantes	Buyer One	nateo@car.org	
<input type="checkbox"/>	Eleanor		Liarene	Seller One		
<input checked="" type="checkbox"/>	LAURIE		GABBERT	Listing Agent	nateo@car.org	

6. Click the **green check-boxes** on the left to select your recipients.
7. Click on **Done**.
8. Click, hold, and drag names to change signing order, if desired.
9. Click the **CC Box** if you'd like to send a signer a PDF copy of all the documents once signed by all parties, if desired.
10. Check **Text Message Authentication** or **Verify ID** if you'd like to confirm the signer's identity.
11. Click **Next** to assign signatures.

Order	Role	Name	Email	CC	Text Message Authentication(\$)*	Verify ID (\$)*
1	Buyer One	Billy Buyer	nateo@car.org	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Seller One	Sally Seller	nateo@car.org	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

● Adding Signature Tags to Forms

C.A.R. Forms are pre-tagged and ready to send! Always make sure to review forms and to manually add tasks for PDF documents.

1. Click the **Add Signatures/Task** button from the dashboard.
2. Locate documents with the **Document List** drop-down menu.
3. Select the first party on your list and drag and drop signature tags.
4. Click on **Send** to preview the email your client will receive.

Listing @ 123 Main - Unnamed

1 Select Forms >> 2 Select Parties >> 3 Add Signatures

Previous Add Signatures/Task Party List Billy Buyer Buyer One nateo@car.org Document List Res. Listing Agmt. - Exclusive ... Send Save Quit

working out of the same or different office locations.

Multiple Buyers: Broker (individually or through its associate licensees) may be working with many prospective buyers at the same time. These prospective buyers may have an interest in, and make offers on, the same properties. Some of these properties may be listed with Broker and some may not. Broker will not limit or restrict any particular buyer from making an offer on any particular property whether or not Broker represents other buyers interested in the same property.

... licensees) may have listings on many properties at the same of those listed properties. Some listed properties may appeal to more prospective buyers than others. Some of these prospective Broker will market all listed properties to all prospective buyers that may appeal to the same prospective buyers.

... acknowledges that broker may represent prospective buyers al agent for both seller and buyer in that transaction. If Buyer may represent sellers of property that Buyer is interested in both buyer and seller with regard to that property.

... Broker, without the prior written consent of the Buyer, will not ater than the offered price; (b) Broker, without the prior written r is willing to sell property at a price less than the listing price; gent is obligated to disclose known facts materially affecting the

... it seller or listing agent may disclose the existence, terms, or ve signed a written confidentiality agreement. Whether any such h as current market conditions, the prevailing practice in the real

estate community, the listing agent's marketing strategy and the instructions of the seller.

Buyer and seller understand that Broker may represent more than one buyer or more than one seller and even both buyer and seller on the same transaction and consents to such relationships.

Seller and/or Buyer acknowledges reading and understanding this Possible Representation of More Than One Buyer or Seller - Disclosure and Consent and agrees to the same.

Seller _____

Buyer _____

Signature _____

Signature Preview Sally Seller Billy Buyer

Date _____

Date _____

Date _____

Date _____

Send Invitation

When you are ready to start the signing process, simply click the Send Now button below. You can edit the Title and Email Message if you would like to customize the invitation sent to your parties.

Title Listing @ 123 Main

Email Message Please log into zipLogix Digital Ink and sign these documents.

Send Now

5. Adjust the **Title** of your email.
6. Edit the email to add custom text.
7. Click on **Send Now**.

● Clients Create a Signing Password

Sign forms from any desktop/mobile tablet connected to the internet.

1. Clients must open their email and click the link provided.
2. A new window will appear and they will **Agree to Legal Consent**.
3. They will click **Next** to continue.

This screenshot shows the initial consent screen. At the top, there is a green button labeled "Read Legal Consent". To its right is the text "Agree to Legal Consent?" followed by two radio buttons: "Accept" and "Decline". A red callout bubble with the number "2" points to the "Accept" radio button. Further right is a green button labeled "Next", with a red callout bubble containing the number "3" pointing to it.

4. **Create** and **Confirm** a signing password.
5. Choose on either **Signature Font** or **Draw Your Own Signature**.
6. Click **On to View/Sign**.

This screenshot displays the password and signature selection interface. It features two side-by-side password input fields: "Select your Signing Password" and "Confirm your Signing Password". Below these is a toggle switch labeled "Choose a signature font". To the right of the toggle is the text "Draw your own signature". A red callout bubble with the number "4" points to the "Confirm your Signing Password" field. Another red callout bubble with the number "5" points to the "Draw your own signature" text. Below the toggle, there is a section titled "Signature Font" containing three columns of radio buttons, each with a sample signature. A green button at the bottom right is labeled "On to View / Sign", with a red callout bubble containing the number "6" pointing to it.

Bonus: Clients can use their mouse to create a digital signature.

This screenshot shows the digital signature creation screen. At the top, there is a toggle switch labeled "Choose a signature font" which is currently turned on. To its right is the text "Draw your own signature". Below the toggle, there are two main sections: "Signature" and "Initials". The "Signature" section contains a large text box where a handwritten signature "Billy" is shown, with a mouse cursor icon pointing at it. Below this text box is a green button labeled "Clear". The "Initials" section contains a smaller empty text box, also with a green "Clear" button below it.

● Signing Forms with zipLogix Digital Ink®

Clients will choose either **Let Me Review** to scroll through and sign manually or **Go!** to jump from signature to signature (or task).

1. Clients must choose **Let Me Review** or **Go!**

Ready To Review and Sign?

Select **Go** to jump right to your first action and let us guide you through the document. If you'd rather go at your own pace, choose **Let Me Review**. Simply scroll or use the **NEXT** and **PREV** buttons at the bottom corners of the screen to jump to unfinished signatures and other tasks.

Let Me Review Go!

2. Click on the blue flags to sign the yellow, or required, fields.

Seller Click to sign Signed Date Date

Buyer Signed Date Cesar Cervantes Date

Buyer Click to initial Date

Note: Optional fields will appear as blue or purple and will be marked.

THE MATTERS INCLUDED IN THE FORMATION OF DISPUTES' PROVISION TO NEUTRAL ARBITRATION."

Buyer's Initials Click to initial / Seller's Initials /

3. Click **Finish Signing** to complete the process or **Stay Here** to review.

Finished Signing

You've completed all your document(s)! If you're finished with this document(s), tap **Finish** below to confirm your signatures and other entries on this document(s). If you want to spend more time reviewing the document(s), select **Stay Here**. Just hit **Finish Signing** when you're done.

Stay Here Finish

Clients will see a **Thank You** page and be able to **Review** the forms there. Clients will be automatically emailed PDF copies of all signed forms. Agents will find these forms in the appropriate Transaction file.

You have successfully completed all required actions.

Thank you for submitting your signature online.

Review

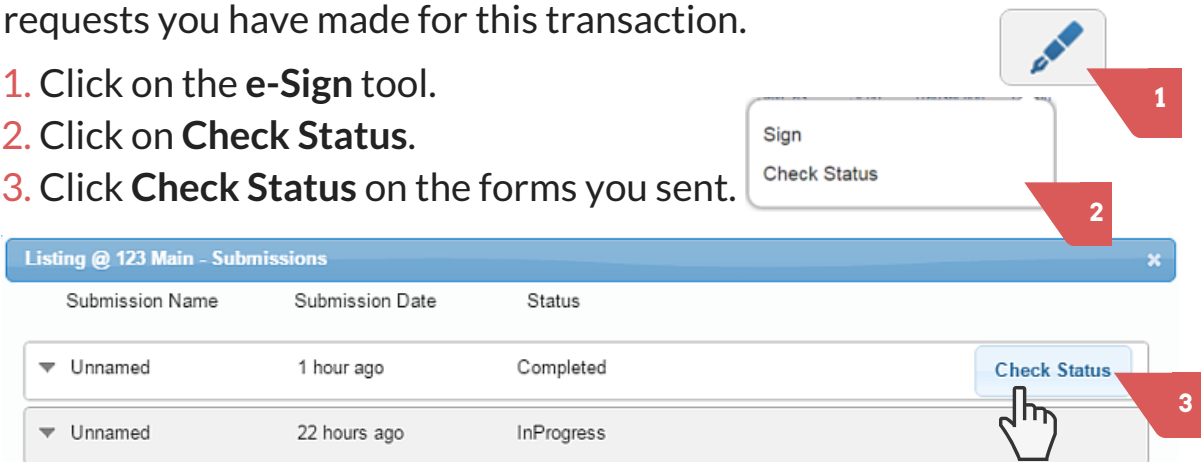
Note:

Agents will also receive an email with a link to PDF versions of the signed forms and notifications updates inside zipForm®.

● Checking the Status of Requests for Signatures

Observe the progress, resend, change, or cancel any signature requests you have made for this transaction.

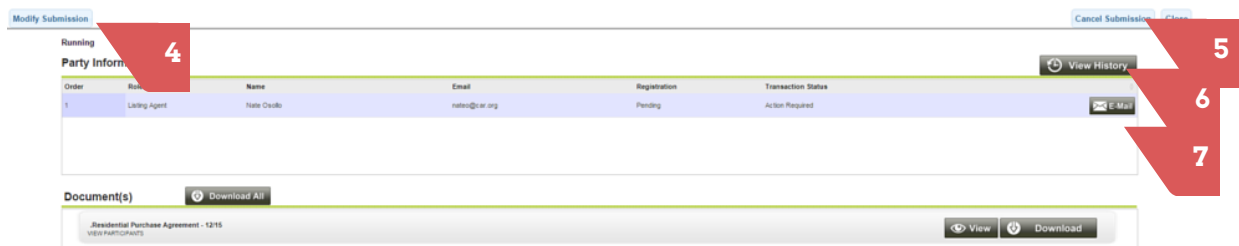
1. Click on the **e-Sign** tool.
2. Click on **Check Status**.
3. Click **Check Status** on the forms you sent.



The screenshot shows the 'e-Sign' tool interface. At the top, there is a 'Sign' button and a 'Check Status' button. A red arrow labeled '1' points to the 'Sign' button. Another red arrow labeled '2' points to the 'Check Status' button. Below this is a table titled 'Listing @ 123 Main - Submissions'. The table has three columns: 'Submission Name', 'Submission Date', and 'Status'. There are two rows of submissions. The first row is 'Unnamed' with a submission date of '1 hour ago' and a status of 'Completed'. The second row is 'Unnamed' with a submission date of '22 hours ago' and a status of 'InProgress'. A red arrow labeled '3' points to a 'Check Status' button next to the 'InProgress' submission. A hand cursor is shown clicking on this button.

Submission Name	Submission Date	Status
▼ Unnamed	1 hour ago	Completed
▼ Unnamed	22 hours ago	InProgress

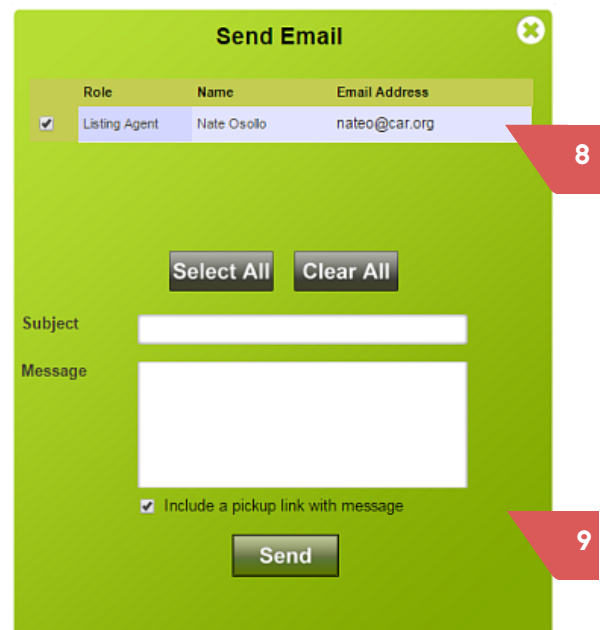
4. **Modify** signature tasks as needed.
 5. **Cancel** the request for signatures if needed.
 6. View a log of signing activities and who completed them.
- Note:** These functions are available for 30 days after sending forms.



The screenshot shows the 'Modify Submission' interface. At the top, there is a 'Modify Submission' button and a 'Cancel Submission' button. A red arrow labeled '4' points to the 'Modify Submission' button. Below this is a table with columns: 'Order', 'Role', 'Name', 'Email', 'Registration', and 'Transaction Status'. There is one row with the following data: '1', 'Listing Agent', 'Nate Osollo', 'nateo@car.org', 'Pending', and 'Action Required'. A red arrow labeled '5' points to the 'Cancel Submission' button. Below the table is a 'Document(s)' section with a 'Download All' button. A red arrow labeled '6' points to the 'View History' button. A red arrow labeled '7' points to the 'Email' button.

Order	Role	Name	Email	Registration	Transaction Status
1	Listing Agent	Nate Osollo	nateo@car.org	Pending	Action Required

7. Send a reminder email if needed.
8. Edit the email address if needed.
9. Include a link for clients to start signing.



The screenshot shows the 'Send Email' interface. At the top, there is a 'Send Email' button. Below this is a table with columns: 'Role', 'Name', and 'Email Address'. There is one row with the following data: 'Listing Agent', 'Nate Osollo', and 'nateo@car.org'. A red arrow labeled '8' points to the 'Email Address' column. Below the table are 'Select All' and 'Clear All' buttons. Below these are 'Subject' and 'Message' input fields. A red arrow labeled '9' points to the 'Include a pickup link with message' checkbox. At the bottom is a 'Send' button.

Role	Name	Email Address
<input checked="" type="checkbox"/>	Listing Agent	Nate Osollo

Helpful Links and Notes

FREE YouTube Training Videos

www.youtube.com/zipLogix

Live and Pre-recorded Webinars

car.org/education/webinars/

FREE Training Guides from C.A.R.

car.org/tools/zipform/forms/

Step by Step Instructions

car.org/tools/zipform/forms/stepbystep/

[illegible]