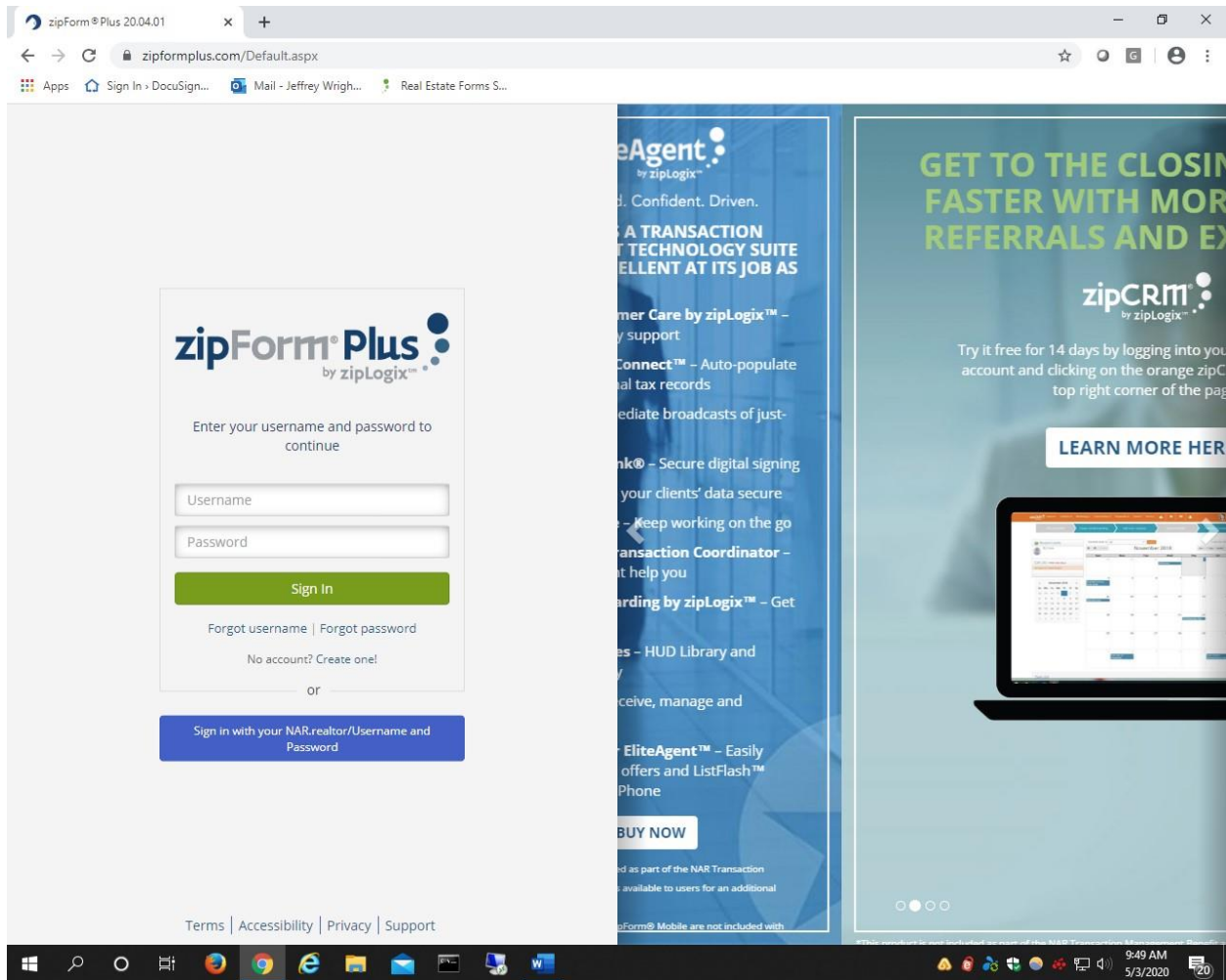


Zip Logix Listing Transaction Process

A Listing from Start to Finish

1. Log in to Zip Logix (www.zipformsplus.com).



Zip Logix Listing Transaction Process

- Depending on how you have set up your profile you will either have the “Dashboard” as your home page, or you will have “Transactions” as your home page. Either way, you will need to be in “Transactions” to create a new transaction. If your home page is indeed the “Dashboard,” click on the “Transactions” icon.

zipForm Plus 20.04.01

zipformplus.com/Default.aspx

Apps Sign In > DocuSign... Mail - Jeffrey Wrigh... Real Estate Forms S...

zipForm Plus

Dashboard Transactions Admin Partners Help

All Offices

New Listings 1 \$400,000

Closed Txns 0

Expired Txns 2

Fell Through 0

Number of Transactions

Day of Month

Recent Activity

Jeffrey F. Wright, II created transaction [For Release Notes](#) 14 mins. ago

Bill Mamak created transaction [Narayanan Hariharan](#) 18 hours ago

Neena Mehta created transaction [NINA](#) Yesterday

Lauren Spina created transaction [40 Wedgewood Dr](#) Yesterday

Nina Nyrop created transaction [155 Corona Dr, Milford](#) Yesterday

DJ Dube created transaction [Meaghan Sullivan & Andrew Pizzoferrato](#) Yesterday

DJ Dube created transaction [Stone](#) Yesterday

Lydia Liburd approved document [Fully Executed Contract.PDF](#) Yesterday

Lydia Liburd approved document [Fully Acknowledged Property Condition Disclosure.PDF](#) Yesterday

Lydia Liburd approved document [Fully Acknowledged Property Condition Disclosure.PDF](#) Yesterday

7 Transactions to approve

91 Documents to approve

0 Tasks to approve

74 Tasks not started

0 Tasks in progress

18 Overdue tasks

Terms Accessibility Privacy Support

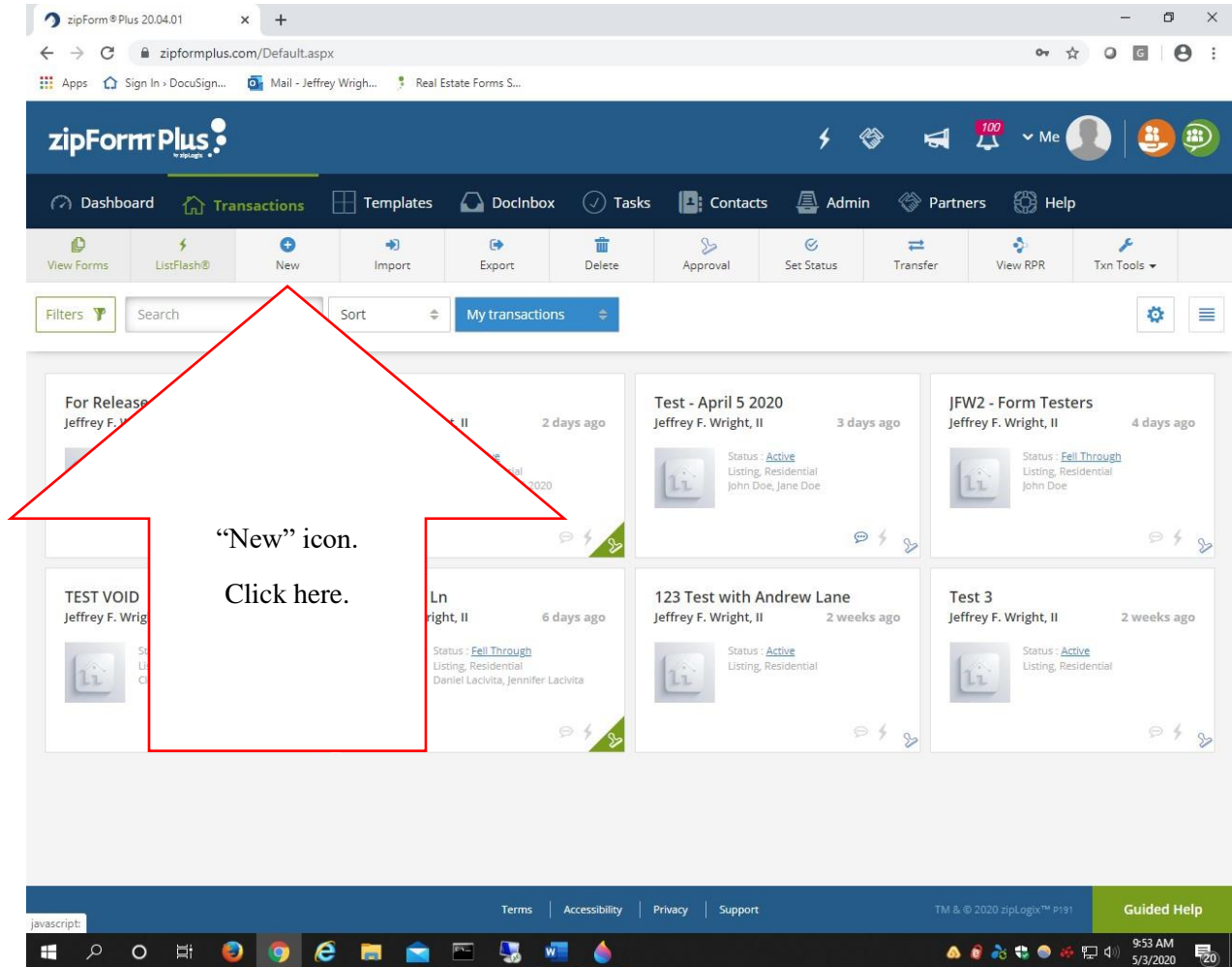
TM & © 2020 zipLogix™ P191

Guided Help

9:52 AM 5/3/2020

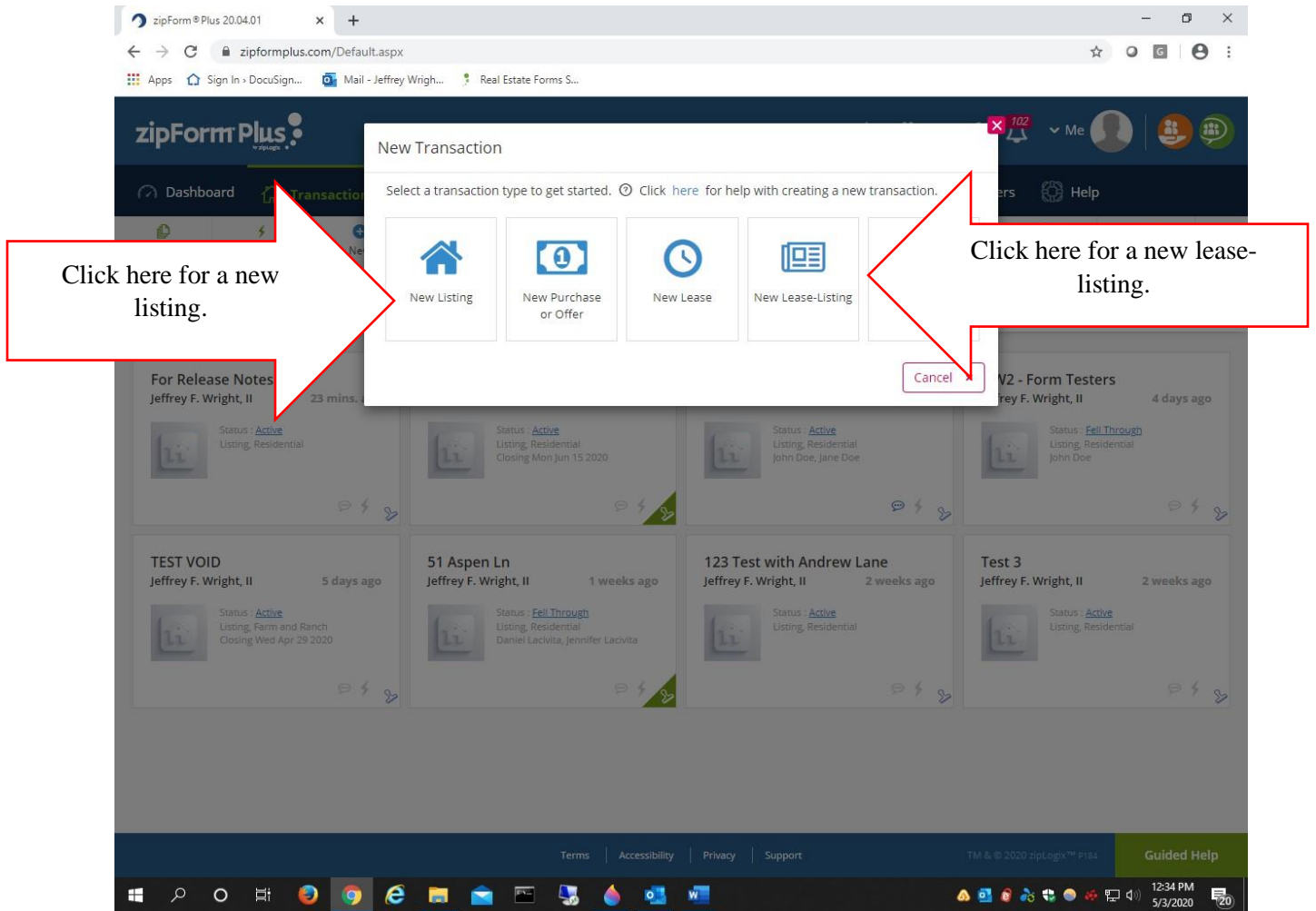
Zip Logix Listing Transaction Process

3. Click on the “New” icon to start the process of creating a new transaction.



Zip Logix Listing Transaction Process

4. Choose the type of transaction you are creating. As this is the process for a listing, you should choose “New Listing” or “New Lease-Listing.”



Zip Logix Listing Transaction Process

5. Fill out the basics of your transaction.
 - a. Transaction Name (Property address is recommended and preferred.)
 - b. Category
 - c. Template (Should be automatically applied.)
 - d. Save

The screenshot shows the ZipLogix web application interface for creating a new listing transaction. The form is titled "Name*" and includes a text input field for "Enter Name or Property Address". Below this is a "Select your location" dropdown menu showing "RE/MAX Right Choice - Corporate, 105 Technology Drive, Suite 1A". The "Import Property Information" section includes a checkbox for "zipForm Record-Connect™" and a "Category*" dropdown menu. The category options are: Residential, Farm and Ranch, Industrial, Manufactured Home, Multiunit, Co-Op, Condominium, Unlisted, Commercial, Other, and Vacant Land. The "Status" section has radio buttons for Active (selected), Pending, Prospect, Inactive, and Fell Through. The "Agent" field shows "Jeffrey F. Wright, II controller@rightchoicerealestate.com". The "Select Template" dropdown shows "My Templates". The "Comments" section has a text area for "Transaction Comments". At the bottom right, there are "Cancel" and "Save" buttons. Annotations with red arrows point to various fields: "Transaction name. For a listing of any sort, property address is preferred." points to the Name field; "Choose 'Residential' for any type of residential transaction. Choose 'Commercial' for any type of commercial transaction. Do not choose any other category." points to the Category dropdown; "This should be automatically applied." points to the Template dropdown; and "Save or you will have to start over." points to the Save button.

Transaction name. For a listing of any sort, property address is preferred.

Choose "Residential" for any type of residential transaction. Choose "Commercial" for any type of commercial transaction. Do not choose any other category.

This should be automatically applied.

Save or you will have to start over.

*Note: There are other functions available on this page such as adding an image, MLS-Connect, and Record-Connect. These functions are all helpful but unnecessary for a quick start. Other options you see in this photo are because I am an administrator, and this is what I see. You will not see these options.

Zip Logix Listing Transaction Process

- When you click “Save” your transaction will be created and you will be brought to the Transaction Summary page.

The screenshot shows the zipForm Plus 20.04.01 web application interface. The top navigation bar includes a 'Summary' icon, which is highlighted in a light gray box. A red arrow points to this icon with the text 'The “Transaction Summary” page.' The main content area displays a 'Property Summary' form with various fields for transaction details. The 'Active' status is highlighted in the top navigation bar. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 10:45 AM on 5/3/2020.

*Note: You can always tell where you are in a transaction by which icon is highlighted in a light gray box. In this case, you are on the transaction summary page as the “Summary” icon is highlighted.

Zip Logix Listing Transaction Process

**For the rest of this guide, we will be using a Residential Listing. The process is virtually the same for any other transaction you will do.*

7. Upload all required listing documents and any other pertinent information. You will do this from the “Checklist” we have created to ensure that we have the proper documentation necessary for compliance with Connecticut state law and E&O Liability protection.

zipForm Plus 20.04.01

zipformplus.com/Default.aspx

Apps Sign In DocuSign... Mail - Jeffrey Wright... Real Estate Forms S...

zipForm Plus

For Release Notes
TID 62149232
Retained until May 03, 2029

Summary Parties Documents Checklist Notes History My Partners

ALL FORMS

E-Sign ListFlash® MLS-Connect Record-Connect™ Add Doc Apply template Send

Modified 1 hour ago

Jeffrey F. Wright, II
controller@rightchoicerealestat
e.com
TC:

Signatures In Progress
View all signature packets

Required Tasks
Overdue: 17
To Do: 17/17
View checklist

Parties

Prospect Active Pending Closed
Fell Through

Documents

Property Summary RPR

MLS Number Unit Number

Street Address
1234 Test Lane

State Zip
CT 00001

Subdivision School District Municipality

Zoning Block Number Page Number

Assessors Parcel # Parcel/Sidwell # Year Built

Click here to upload your documents.

Recent activity on this transaction is not available at the moment. Click the button below to see most recent entries.

See More

Terms Accessibility Privacy Support

TM & © 2020 zipLogix™ P191

Guided Help

10:45 AM
5/3/2020

Zip Logix Listing Transaction Process

8. On the “Checklist” page you will see one long checklist with three (3) different categories: Listing, Transaction, and Show Me the Money. We will start with Listing paperwork since this is where we are in the process. On this page there are several things to take note of:
 - a. Status – Where are you in the process of completing this task?
 - b. Task Name – What document do you need to upload here?
 - c. Due Date – When should you upload this document?
 - d. Required – *We made them all required.
 - e. Documents – When you upload a document its name will show here.
 - f. Responsible Party – You, the agent, are responsible.
 - g. Description – In case you do not know what something is.

zipForm® Plus 20.05.01 | DocuSign Transaction Rooms W... | zipformplus.com/#

Paperwork - Checklist* [+ New Category](#)

Listing Paperwork - Category

A. STATUS	B. TASK NAME	C. DUE DATE	D. REQUIRED	E. DOCUMENTS	F. RESPONSIBLE PARTY	G. DESCRIPTION
✓ Not started	Signed Listing Agreement Submit for review	1 day after Listing Date	Yes	--	Unassigned	Signifies the creation of an agency relationship between the Seller(s) and the Brokerage.
✓ Not started	Seller's Property Condition Disclosure Report Submit for review	1 day after Listing Date	Yes	--	Unassigned	Provides the Buyer(s) with background information on the property. A credit can be given in lieu of completion.
✓ Not started	Seller's Lead Paint Disclosure Submit for review	1 day after Listing Date	Yes	--	Unassigned	Informs the Buyer(s) if the property has been tested for Lead-Based Paint hazards and the results of said test, if applicable.
✓ Not started	Seller's Mold Disclosure Submit for review	1 day after Listing Date	Yes	--	Unassigned	Informs the Buyer(s) if the property has been tested for Mold and the results of

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3:49 PM 5/9/2020

Zip Logix Listing Transaction Process

9. To upload a document, scroll through the checklist to find the Task which is associated with your document. Place your cursor over the task name and when the correct task is underlined, click on the task.

zipForm® Plus 20.05.01 x DocuSign Transaction Rooms W... x | +

zipformplus.com/#

Apps Sign In + DocuSign... Mail - Jeffrey Wrigh... Real Estate Forms S...

Paperwork - Checklist* + New Category

Listing Paperwork - Category

Create a new task

STATUS	TASK NAME						
✓ Not started	<u>Signed Listing Agreement</u> Submit for review						
✓ Not started	Seller's Property Condition Disclosure Report Submit for review	1 day after Listing Date	--		Unassigned		Provides the Buyer(s) with background information on the property. A credit can be given in lieu of completion.
✓ Not started	Seller's Lead Paint Disclosure Submit for review	1 day after Listing Date	Yes	--	Unassigned		Informs the Buyer(s) if the property has been tested for Lead-Based Paint hazards and the results of said test, if applicable.
✓ Not started	Seller's Mold Disclosure Submit for review	1 day after Listing Date	Yes	--	Unassigned		Informs the Buyer(s) if the property has been tested for Mold and the results of

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4:03 PM 5/9/2020

You can click on a task to upload your document once you have moved your cursor over the task name. When the task is underlined, click on it.

Zip Logix Listing Transaction Process

10. The upload screen has an expanded view of the information that can be found on the checklist. In the bottom left-hand corner of the screen you can attach a document.

[illegible]

Zip Logix Listing Transaction Process

11. You will be able to choose a document from multiple places:
- Select an existing document – A document you already have in your transaction (including Fillable forms).
 - Browse for new document – Uploading a document from your computer, google drive, Dropbox, etc.
 - Create Placeholder – **Do not use this option.** Thank you.

The screenshot shows the ZipForm Plus web application interface. A modal window titled 'Paperwork > Edit Task' is open. The 'Task Name' field contains 'Signed Listing Agreement' and the 'Category' is 'Listing Paperwork'. The 'Due Date' is set to 'Relative' with a value of '1' day 'After' the 'Listing Date'. The 'Required' checkbox is checked. The 'Responsible Party' is 'Unassigned'. A red arrow points to the 'Attach Documents' dropdown menu, which is open and shows three options: 'Select an existing document', 'Browse for new document', and 'Create placeholder'. A text box with a red border and a red arrow pointing to the dropdown menu contains the text: 'Choose an attachment option to upload your document. Then click save.' The background shows a list of tasks with status indicators like 'Not started' and '1 day after Listing Date'.

*To ensure clarity for all, your document should be named as a combination of the task and the property address. Ex. Signed Listing Agreement – 123 Main Street, Trumbull.

Repeat this process for each document you need to upload.

Zip Logix Listing Transaction Process

**An Aside: Any document you upload to a task in the checklist will automatically end up in the “Documents” section of the transaction as well.*

You may also notice that in the Documents section we have created several folders for you to toss your documents into so you don't get overwhelmed by the sheer amount of information that may end up here.

The screenshot displays the zipForm Plus web application interface. At the top, the navigation bar includes a 'Back to List' button, a 'Documents' tab, and a 'Summary' button. Below the navigation bar, there is a toolbar with icons for 'Add Doc', 'Add folder', 'Move', 'Apply template', 'Print', 'Send', 'Save as PDF', 'Download', 'Preview Docs', 'Copy', and 'More'. The main content area is titled 'DOCUMENTS' and features a search bar, a 'Filters' button, and a 'Sort' dropdown. Below this, there are several document thumbnails, including a 'Cover Sheet - [COVER_A]' and a 'Pure Imagination - A'. A red box highlights the 'Documents' tab in the navigation bar, with a callout stating: 'I uploaded this into my checklist and showed up here in “Documents” as well.' Another red box highlights the 'Folders' section, which includes 'Listing Paperwork', 'Transaction Paperwork', 'Show Me The Money', and 'Archive'. A third red box highlights the 'Folders' section, with a callout stating: 'Folders to keep my documents organized, if, and only if, I want them to be organized.'

I uploaded this into my checklist and showed up here in “Documents” as well.

Folders to keep my documents organized, if, and only if, I want them to be organized.

Zip Logix Listing Transaction Process

12. After uploading your document, click the “Submit for Review” stamp located below the task name.

The screenshot shows the zipForm Plus 20.05.01 web application interface. The main content area is titled 'Listing Paperwork - Checklist' and contains a table with the following columns: STATUS, TASK NAME, DUE DATE, REQUIRED, DOCUMENTS, RESPONSIBLE PARTY, and DESCRIPTION. The first row of the table is highlighted with a red box, and a red arrow points to the 'Submit for review' link under the 'TASK NAME' column. A text box is overlaid on the screenshot, asking 'Is your document ready for review? Click the “Submit for Review” stamp.'

STATUS	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	DESCRIPTION
Not started	Signed Listing Agreement Submit for review	1 day after Listing Date	Yes	--	Unassigned	Signifies the creation of an agency relationship between the Seller(s) and the Brokerage.
		1 day after Listing Date	Yes	--	Unassigned	Provides the Buyer(s) with background information on the property. A credit can be given in lieu of completion.
		1 day after Listing Date	Yes	--	Unassigned	Informs the Buyer(s) if the property has been tested for Lead-Based Paint hazards and the results of said test, if applicable.
		1 day after Listing Date	Yes	--	Unassigned	Informs the Buyer(s) if the property has been tested for Mold and the results of said test, if applicable.

Zip Logix Listing Transaction Process

13. You will be given the option to choose as many documents to send for review at one time as you wish to do so. After you choose the documents you are sending for review, click the “Next” button in the upper right-hand corner of the page.

The screenshot displays the zipForm Plus interface. At the top, there's a navigation bar with the logo and user profile. Below it, a section titled "Select Tasks To U..." is visible. A large red arrow points from the text "After document selection, click next." to the "NEXT >" button in the top right corner. Below this, a section titled "Financial Milestones" shows "No Contingency". The main area is a table titled "Listing Paperwork - Category". The table has columns: STATUS, TASK NAME, DUE DATE, REQUIRED, DOCUMENTS, RESPONSIBLE PARTY, and DESCRIPTION. The first row shows a task with a green checkmark in the status column. The second row shows a task with a dropdown menu set to "Not started". A red arrow points from the text "First, select the documents you are submitting for review." to the dropdown menu. The footer contains links for Terms, Accessibility, Privacy, and Support, along with a "Guided Help" button.

After document selection, click next.

First, select the documents you are submitting for review.

STATUS	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	DESCRIPTION
<input checked="" type="checkbox"/>						Signifies the creation of an agency relationship between the Seller(s) and the Brokerage.
<input type="checkbox"/> Not started	Seller's Property Condition Disclosure Report	1 day after Listing Date	Yes	--	Unassigned	Provides the Buyer(s) with background information on the property. A credit can be given in lieu of completion.
	Seller's Lead Paint Disclosure	1 day after				Inform the Buyer(s) if the property has been tested for Lead-

Zip Logix Listing Transaction Process

14. “Select an approval stamp.” The default option of “Needs Review” has been pre-selected for you. If you need to write a message to the administrator reviewing your documents, you can do this here as well.

**Even if you are submitting multiple documents at the same time, you only have one comment box. So, if you are noting something, be extra specific with which document(s) you are communicating to us about.*

Comment box.

Always save your work.

The screenshot displays the zipForm Plus interface. A modal window titled "Select an approval stamp" is open, featuring a "Needs Review" button and a text area for comments. A red arrow points to the comment box with the text "Comment box." Another red arrow points to the "Save" button with the text "Always save your work." The background shows a list of transactions with columns for status, task name, date, and assigned user.

STATUS	TASK NAME	DATE	ASSIGNED TO
Not started	Signed Listing Agreement	Mar 02, 2020	Yes
Not started	MLS Data Input Sheet	Mar 02, 2020	Yes
Not started	Property Condition Disclosure Report	Mar 02, 2020	Yes
Not started	Lead Paint Disclosure	Mar 02, 2020	Yes

Zip Logix Listing Transaction Process

After saving, your checklist will now show that your items “Need Review.”

Listing Expiration Date ★ Sep 01, 2020

Listing Date ★ Mar 01, 2020

Document/Transaction Checklist [+ New Category](#)

Listing Paperwork - Category

Create a new placeholder

STATUS	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	DESCRIPTION
✓ Needs review	Signed Listing Agreement Submit for review	⚠ Mar 02, 2020	Yes	(Required) Exclusive Right to Sell Listing Contract	Unassigned	
✓ Needs review	MLS Data Submit for review					
✓ Needs review	Lead Paint Disclosure Submit for review	⚠ Mar 02, 2020	Yes	(Required) Lead Paint Disclosure (Sellers)	Unassigned	
✓ Needs review	Mold Disclosure Submit for review	⚠ Mar 02, 2020	Yes	(Required) Mold Disclosure (Sellers)	Unassigned	

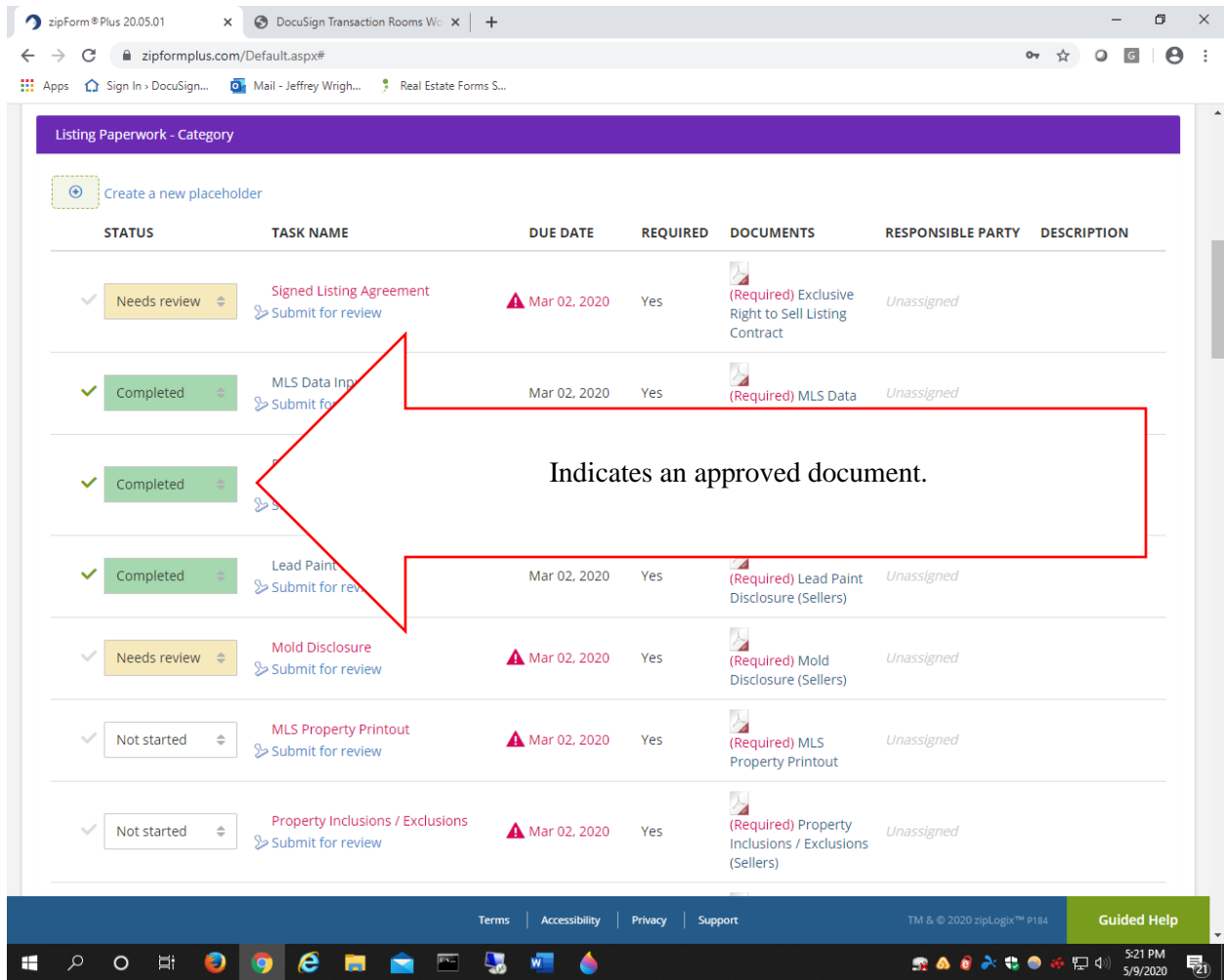
Terms | Accessibility | Privacy | Support

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5:14 PM 5/9/2020

Zip Logix Listing Transaction Process

So, how do you know if a document has been approved or denied? If the dropdown menu has turned green and says “Completed,” your document is approved.



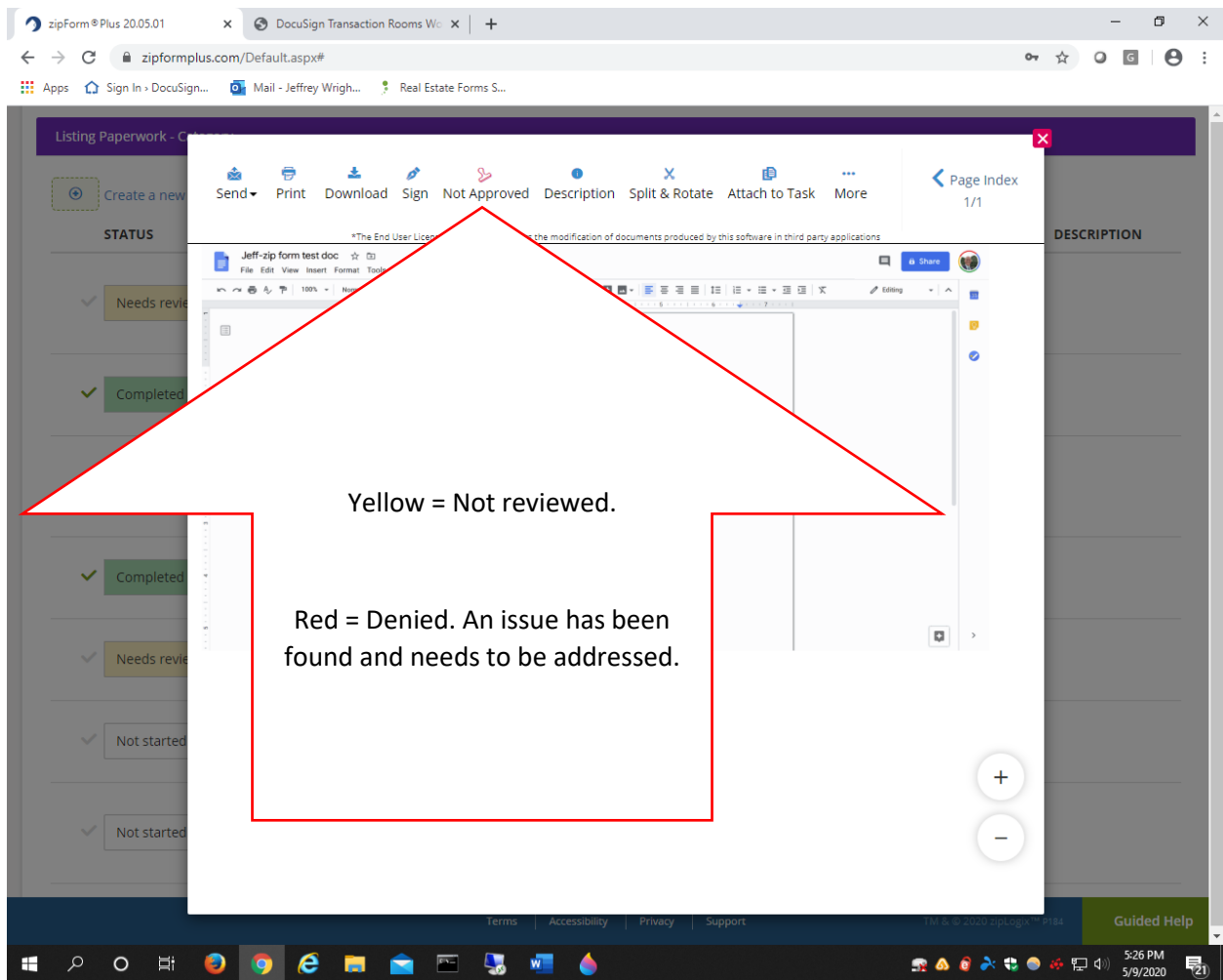
The screenshot displays the 'Listing Paperwork - Category' page in the ZipLogix Plus 20.05.01 application. The page features a table with the following columns: STATUS, TASK NAME, DUE DATE, REQUIRED, DOCUMENTS, RESPONSIBLE PARTY, and DESCRIPTION. The table lists several documents, including 'Signed Listing Agreement', 'MLS Data Input', 'Lead Paint Disclosure (Sellers)', 'Mold Disclosure', 'MLS Property Printout', and 'Property Inclusions / Exclusions'. The 'STATUS' column shows dropdown menus for each document. A red arrow points to the 'Completed' status dropdown for the 'MLS Data Input' task, with a text box stating 'Indicates an approved document.'

STATUS	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	DESCRIPTION
Needs review	Signed Listing Agreement Submit for review	Mar 02, 2020	Yes	(Required) Exclusive Right to Sell Listing Contract	Unassigned	
Completed	MLS Data Input Submit for review	Mar 02, 2020	Yes	(Required) MLS Data	Unassigned	
Completed						
Completed	Lead Paint Disclosure (Sellers) Submit for review	Mar 02, 2020	Yes	(Required) Lead Paint Disclosure (Sellers)	Unassigned	
Needs review	Mold Disclosure Submit for review	Mar 02, 2020	Yes	(Required) Mold Disclosure (Sellers)	Unassigned	
Not started	MLS Property Printout Submit for review	Mar 02, 2020	Yes	(Required) MLS Property Printout	Unassigned	
Not started	Property Inclusions / Exclusions Submit for review	Mar 02, 2020	Yes	(Required) Property Inclusions / Exclusions (Sellers)	Unassigned	

Zip Logix Listing Transaction Process

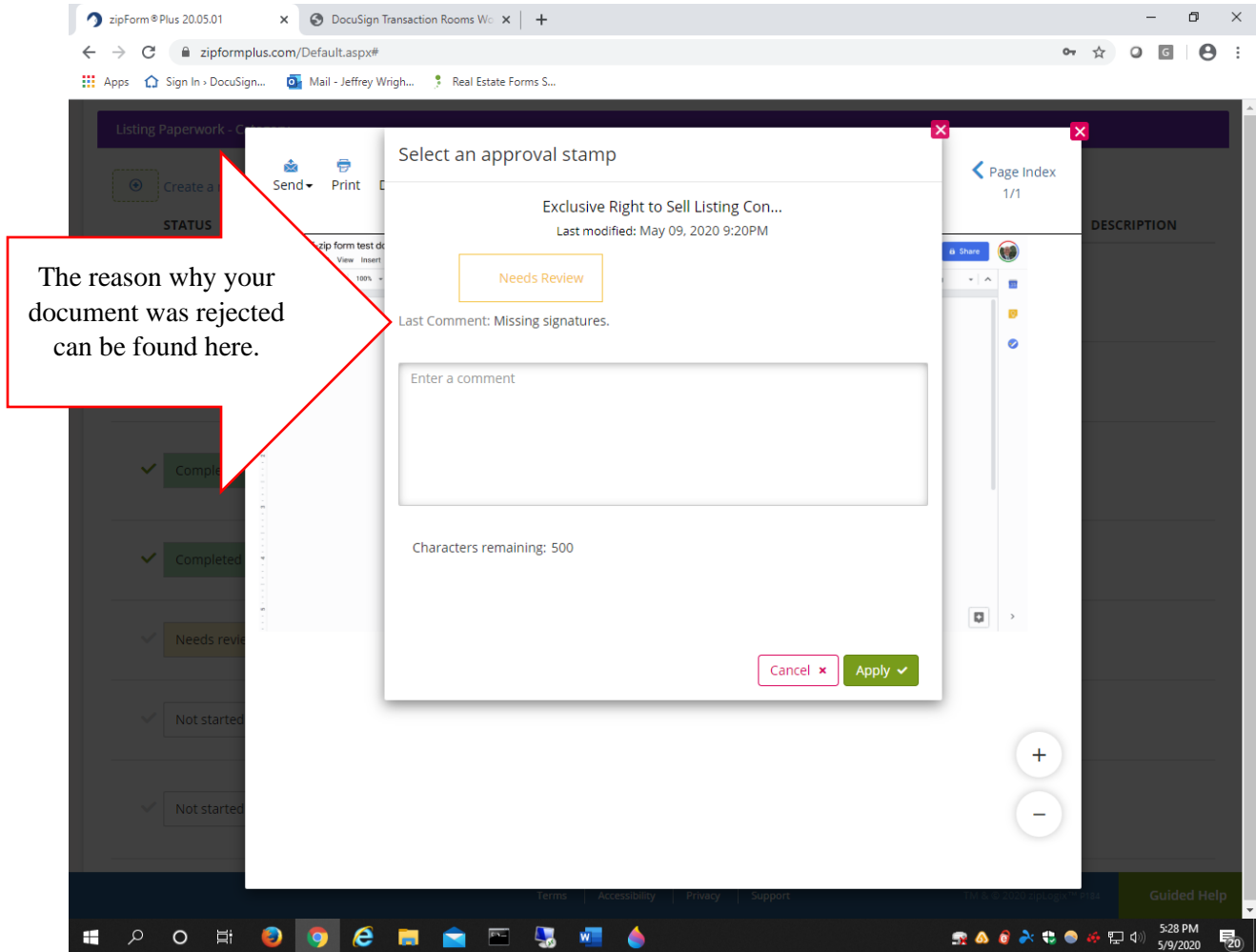
If your documents still say “Needs Review” they have not been approved. This means one of two things. One, an administrator has not reviewed your document yet. Or, two, something is wrong with your document.

Click on the document and look for the approval stamp on the icon bar above the document. If the stamp is still yellow, it has not been reviewed. If the stamp is red, it has been denied, and there will be a comment to tell you why.



Zip Logix Listing Transaction Process

If you have red stamp denial, click on the stamp icon to see the reason why.



Please address any issues and re-submit as soon as possible.

Zip Logix Listing Transaction Process

15. With your listing paperwork uploaded, please return to the Transaction Summary page and be sure that the Property Summary and Listing Summary sections are filled out. **Note: If you are using fillable forms from Zip Logix, this information should automatically transfer here. If you are using pdf forms, you will need to fill this out yourself.*

The screenshot displays the ZipLogix Plus 20.05.01 web application interface. A red box highlights the 'Property Summary' section, which is a form for entering property details. The form includes fields for MLS Number, Unit Number, Lot Number, Street Address, City, State, Zip, County, Subdivision, School District, Municipality, Zoning, Block Number, Page Number, Assessors Parcel #, Parcel/Sidwell #, Year Built, and Legal Description. A red arrow points from the 'Property Summary' label to the form. The interface also shows a sidebar with navigation links like 'Back to List', 'E-Sign', 'ListFlash', and 'MLS-Connect'. A 'Recent Documents' section is visible on the right, and a 'Recent Activity' section is at the bottom right. The footer contains links for Terms, Accessibility, Privacy, and Support, along with a 'Guided Help' button.

Property Summary

Modified 57 mins. ago

Jeffrey F. Wright, II
controller@rightchoicerealestate.com
TC:

Signatures In Progress
[View all signature packets](#)

Required Tasks
Overdue: 0
To Do: 0/0
[View checklist](#)

Parties
[More Parties](#)

Property Summary RPR

MLS Number Unit Number Lot Number

Street Address City

State Zip County

Subdivision School District Municipality

Zoning Block Number Page Number

Assessors Parcel # Parcel/Sidwell # Year Built

Legal Description

Recent Documents

Recent Activity
Recent activity on this transaction is not available at the moment. Click the button below to see most recent entries.
[See More](#)

Submit for review

Terms Accessibility Privacy Support

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Guided Help

5:50 PM 5/9/2020

Zip Logix Listing Transaction Process

The screenshot shows the ZipLogix Plus 20.05.01 web application. The browser address bar shows the URL zipformplus.com/Default.aspx. The page has a sidebar with a 'Parties' section containing a 'More Parties' link. The main content area features a 'Listing Summary' form. A red box highlights the 'Listing Summary' section, and a red arrow points from it to the 'Listing Summary' form below.

Listing Summary

Listing Date Listing Expiration Date Listing Price

1st Trust Deed Balance 2nd Trust Deed Balance

HOA Dues HOA Name

Other Liens Other Lien Description

Leasing Items

Includes

Excludes

Comments (INTERNAL USE ONLY)

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Guided Help

5:54 PM 5/9/2020

Once you have uploaded and received approvals for all listing paperwork and filled in the Property Summary and Listing Summary on the Transaction Summary Home Page, it is time to move on to the transaction paperwork portion of the transaction.

Zip Logix Listing Transaction Process

A deal has been put together, congratulations. This next section of the transaction must be done in a timely fashion. It is our expectation that within 24 hours of an offer being accepted that the following steps will take place to ensure that our accounting and transaction records accurately reflect the business we are doing as a firm.

16. The remaining sections of the Transaction Summary Page, except the “Closing – brokerWOLF” section, must be filled out.

The screenshot displays the zipForm Plus 20.05.01 web application interface. The browser address bar shows the URL zipformplus.com/Default.aspx. The main content area features a 'Purchase Summary' section, which is highlighted by a red arrow. This section contains several input fields for transaction details, including dates, prices, and amounts. The fields are organized into three columns:

Offer Date	Offer Expiration Date	Offer Acceptance Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Purchase Price	Total Amount Financed	Initial Deposit
<input type="text"/>	<input type="text"/>	<input type="text"/>
Deposit Increase 1	Deposit Increase 2	Deposit Increase 3
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contract Date	Closing Date	Possession Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Escrow Number		
<input type="text"/>		
Comments (INTERNAL USE ONLY)		
<input type="text"/>		

The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 6:07 PM on 5/9/2020. The application footer includes links for Terms, Accessibility, Privacy, and Support, along with a 'Guided Help' button.

Zip Logix Listing Transaction Process

zipForm® Plus 20.05.01

zipformplus.com/Default.aspx

Apps Sign In DocuSign... Mail - Jeffrey Wrigh... Real Estate Forms S...

Contract Date Closing Date Possession Date

Escrow Number

Comments (INTERNAL USE ONLY)

Closing - brokerWOLF Feedback

Classific Property Type
RESIDENTIAL LEASE

0

This section is for administrators only.
DO NOT TOUCH!
Thank you.

Terms Accessibility Privacy Support TM & © 2020 zipLogix™ P103 Guided Help

6:09 PM 5/9/2020

Zip Logix Listing Transaction Process

The screenshot shows a web browser window displaying the ZipLogix Plus 20.05.01 interface. The browser's address bar shows the URL 'zipformplus.com/Default.aspx'. The page contains two main sections: 'Listing Side Commission Summary' and 'Buying Side Commission Summary'. The 'Listing Side Commission Summary' section includes fields for 'Commission %', 'Commission \$', 'Net Office Commission \$', 'Admin/TC Fee \$', 'Other Deductions \$', and a 'Deduction Details' text area. Below these are fields for 'Agent 1 Name', 'Agent 1 Split %', 'Agent 1 Split \$', 'Agent 1 Net Commission \$', 'Agent 2 Name', 'Agent 2 Split %', 'Agent 2 Split \$', and 'Agent 2 Net Commission \$'. The 'Buying Side Commission Summary' section includes fields for 'Commission %', 'Commission \$', 'Net Office Commission \$', 'Admin/TC Fee \$', and 'Other Deductions \$'. A red arrow points from the text 'Listing Side Commission Summary' to the 'Listing Side Commission Summary' section. Another red arrow points from the text 'Buying Side Commission Summary' to the 'Buying Side Commission Summary' section. The browser's taskbar at the bottom shows various application icons and the system clock indicating 6:11 PM on 5/9/2020.

Listing Side Commission Summary

Buying Side Commission Summary

For the Listing Side Commission Summary, as the listing agent you will know exactly what to put here. If you have an in-house referral to pay, put them in the Agent 2 boxes. If you have a referral to pay out, put it in the deduction details. Do not fill out the “Net Commission” boxes.

For the Buying Side Commission Summary, please just fill out the “Commission %” box. If a different RE/MAX Right Choice agent brought the buyer, you can fill out their name in the “Agent 1” box.

Zip Logix Listing Transaction Process

17. After filling out the remainder of the Transaction Summary page, please return to the top of the page and change the property from “Active” to “Pending.” *This will indicate to the administrator working with your file to fill out the “Closing – brokerWOLF” section of the transaction summary page.*

zipForm® Plus 20.05.01

zipformplus.com/Default.aspx

Apps Sign In > DocuSign... Mail - Jeffrey Wrigh... Real Estate Forms S...

Back to List TID 62359639 Retained until May 09, 2027 Summary Parties Documents Checklist Notes History My Partners

ALL FORMS

E-Sign ListFlash® MLS-Connect Record-Connect™ Add Doc Apply template Send Email to txn Fax coversheet

Modified 57 mins. ago

Prospect **Active** Pending Closed Inactive Submit for review

Fell Through

Jeffrey F. Wright, II
controller@rightchoicerealestat
e.com
TC:

Signatures In Progress
View all signatures

Lot Number

Recent Documents

Recent Activity

Recent activity on this transaction is not available at the moment. Click the button below to see most recent entries.

See More

Overdue: 0
To Do: 0/0
View checklist

Parties
More Parties

Change from active to pending.

Quality
Number
Built

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Zip Logix Listing Transaction Process

18. Now is the time to make sure the following “Parties” are accounted for:

- a. Buyer(s), Seller(s), Other Agent
- b. Everyone else can be entered later

There are two ways to upload these parties to the transaction. One, you have already entered this information in any fillable form (Cover Sheet Bonus on the next page). Two, click on the “Parties” icon and upload the data from there.

Click here to add “Party” information.

Click on a specific party to upload their information.
*Note: If you are using your fillable forms, these will be filled out for you.

Zip Logix Listing Transaction Process

**Aside 2: A Pro Tip Bonus!*

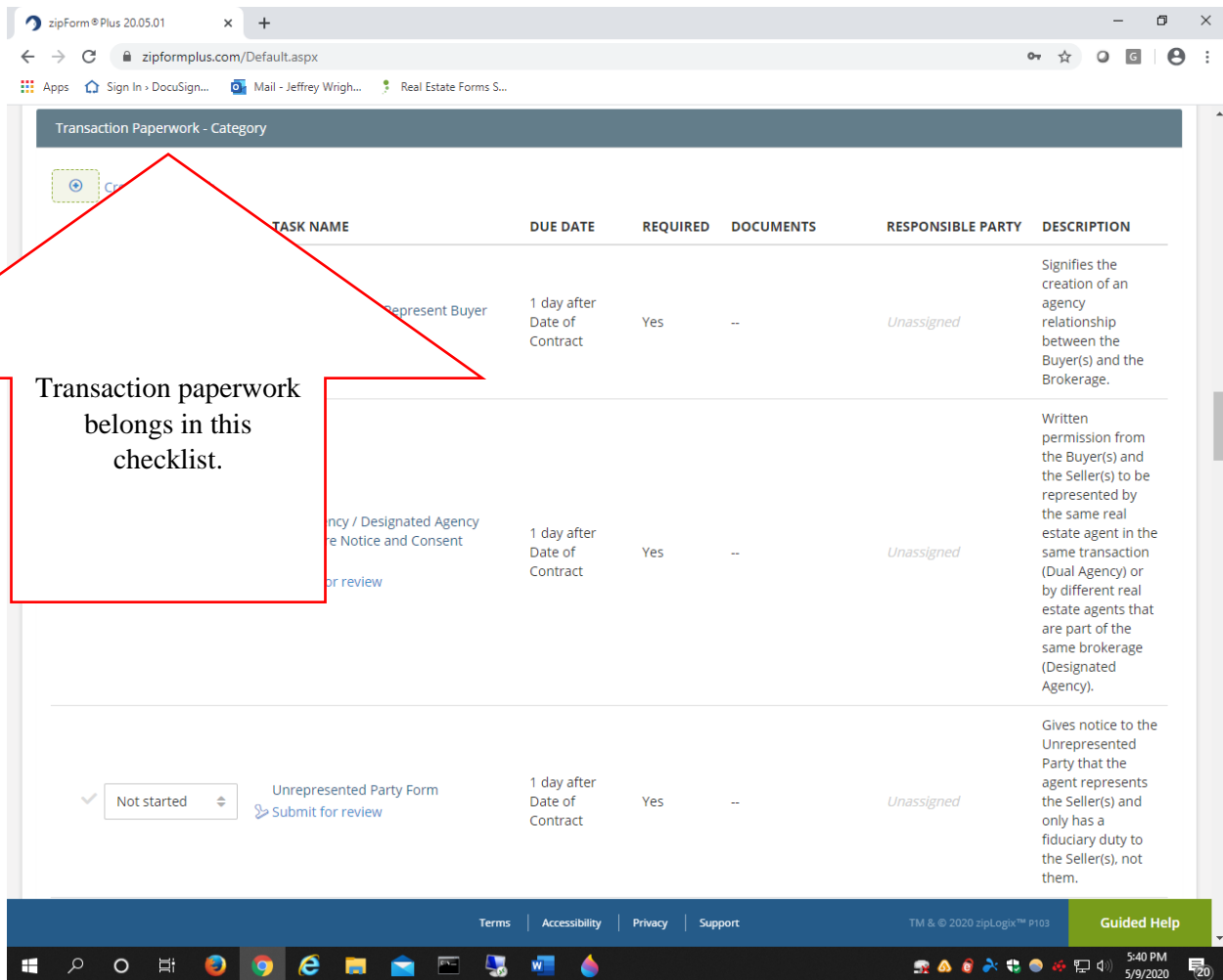
Use the Cover Sheet. In the “Documents” section of every transaction there is a Cover Sheet. It is a fillable form that is linked with everything in your transaction. If you are already using fillable forms, this will fill as you go. However, if you are only using pdfs or other non-fillable documents this form will help you to minimize your data entry.

The screenshot shows the zipForm Plus web application interface. The browser address bar displays 'zipformplus.com/#'. The application header includes the 'zipForm Plus' logo, a 'Back to List' button, and a navigation menu with 'Summary', 'Parties', and 'Documents' tabs. The 'Documents' tab is active. Below the header, there is a toolbar with various actions like 'Add Doc', 'Add folder', 'Move', 'Apply template', 'Print', 'Send', 'Save as PDF', 'Download', 'Preview Docs', 'Copy', and 'More'. A 'FOLDERS' sidebar on the left lists 'Listing Paperwork', 'Transaction Paperwork', 'Show Me The Money', and 'Archive'. The main content area shows a document titled 'Cover Sheet - [COVER_A]' with a 'SET DUE DATE' dropdown. A red arrow points from the 'Documents' tab in the header to a text box that says 'Click here to access the “Documents” page.' Another red arrow points from the 'Cover Sheet - [COVER_A]' document to a text box that says 'Click here to access and edit your fillable Cover Sheet.' The footer of the application includes links for 'Terms', 'Accessibility', 'Privacy', and 'Support', along with a 'Guided Help' button. The system clock at the bottom right shows '4:26 PM 5/9/2020'.

Data seamlessly flows between the fillable forms, the transaction summary page, the parties page, and brokerWolf.

Zip Logix Listing Transaction Process

19. Transaction paperwork. After previously uploading your Listing Paperwork, we know you are experts at doing this. The process for Transaction Paperwork is identical, you just need to use the section of the checklist that is under the heading “Transaction Paperwork.” **This checklist is located directly under the Listing Paperwork checklist. Scroll down and you are sure to see it.*



Transaction Paperwork - Category

TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	DESCRIPTION
Represent Buyer	1 day after Date of Contract	Yes	--	Unassigned	Signifies the creation of an agency relationship between the Buyer(s) and the Brokerage.
Agency / Designated Agency Notice and Consent or review	1 day after Date of Contract	Yes	--	Unassigned	Written permission from the Buyer(s) and the Seller(s) to be represented by the same real estate agent in the same transaction (Dual Agency) or by different real estate agents that are part of the same brokerage (Designated Agency).
<input checked="" type="checkbox"/> Not started Unrepresented Party Form Submit for review	1 day after Date of Contract	Yes	--	Unassigned	Gives notice to the Unrepresented Party that the agent represents the Seller(s) and only has a fiduciary duty to the Seller(s), not them.

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Upload documents, submit for approvals, make corrections (if necessary), receive approvals.

Zip Logix Listing Transaction Process

The deal has closed, and now it is time to get paid!

20. You need to go back through your Listing Paperwork and Transaction Paperwork checklists to confirm that all required documents have been approved. If they still have not been approved, address the outstanding issue so we can pay you.
21. Upload your “Show Me the Money” paperwork. If these things are uploaded before the accounting department receives your commission check then processing can happen in a timely manner. As a reminder, we should not have to chase you down to pay you.
 - a. Commission Check – Will be uploaded by accounting if sent in the mail. If you, the agent, are picking up your check, please upload a copy before dropping it off for processing.
 - b. CDR – Fill this out ahead of time. If it matches the check we receive, we can process said check asap. If it does not match your commission check, we can figure out the discrepancy and correct it right away.
 - c. Referral Agreement Paperwork – You got this referral before you got the client, this should be uploaded at the beginning of your journey.
 - d. Referral Brokerage W-9 – If we ever pay any other Broker, for any reason, we a W-9 form filled out and signed by that brokerage. Ask for it when you sign the referral agreement.
22. After you have been paid, an administrator will archive the file after they have changed it from “Pending” to “Closed.”