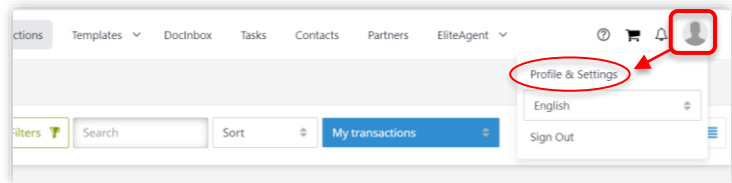


Authentisign is the member benefit digital signing service in your individual zipForm account. Follow the steps in this guide to create, send, track, and edit a signing packet using Authentisign.

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.

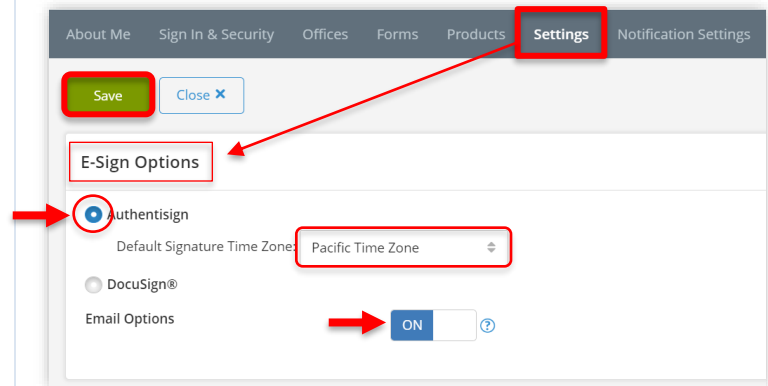
1. Inside your zipForm account, click the photo in the top right corner.
2. Select **Profile & Settings** from the menu.



3. Click the **Settings** tab in the gray navigation bar.

4. In the **E-Sign Options** section, do the following:

- **Authentisign** – click the 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.

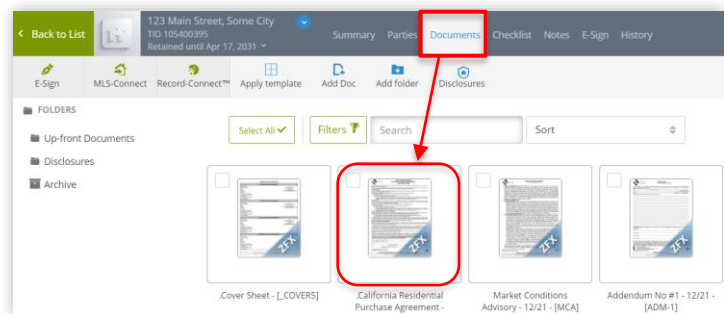
6. Click **Close** at the top left to exit your profile.

Start a Signing Packet inside the Form Editor

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.

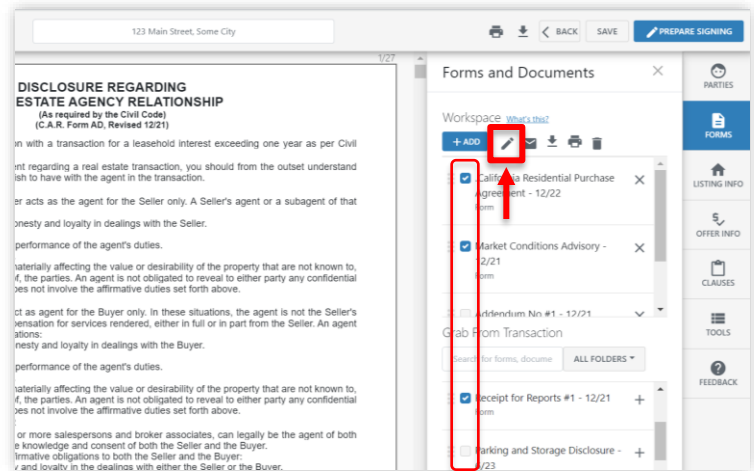


SELECTED FORMS

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*.

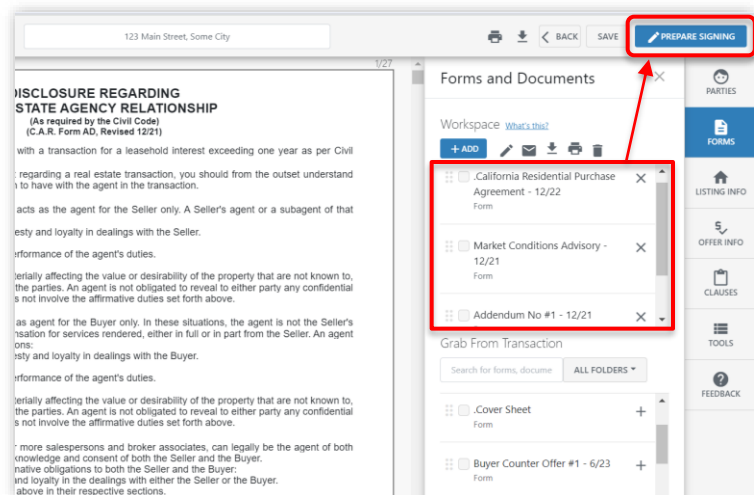
Go to the next section labeled “Create and Send a Signing Packet” to continue with your signing packet.



ALL FORMS IN THE WORKSPACE

1. Click  **PREPARE SIGNING** 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.

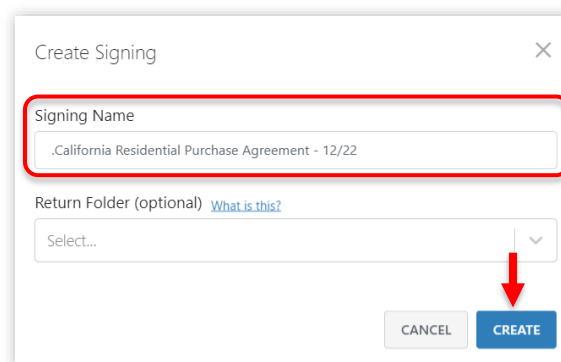
Create Signing

1. **Signing Name** – (*recommended*) edit the Signing Name for the packet – this is the subject line of the email invitation that the participants will receive.

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

2. **Return Folder** – (*optional*) 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.

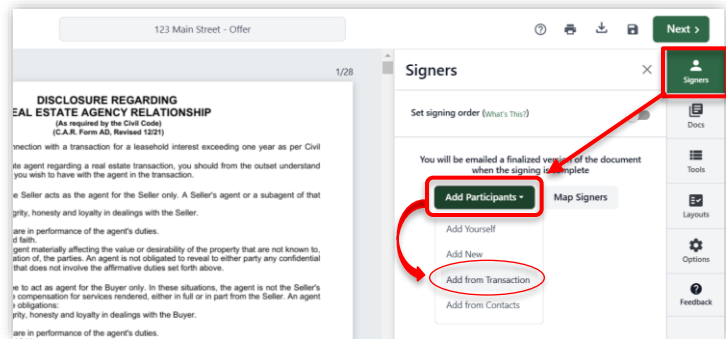


Signers

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

Add Participants ▾

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

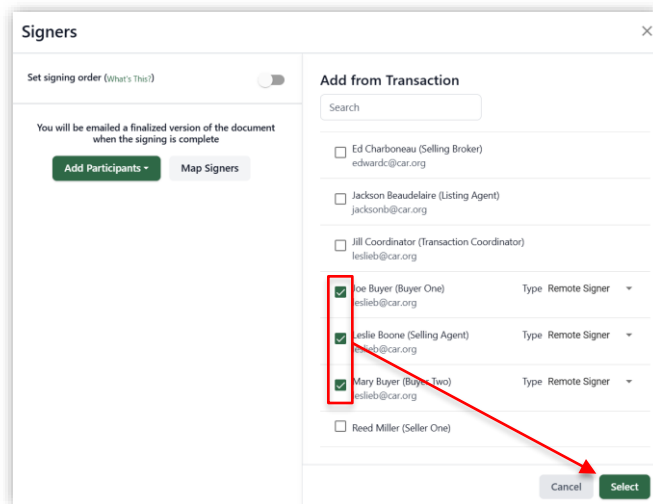


2. Check the box next to each party who needs to sign documents.

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

Select

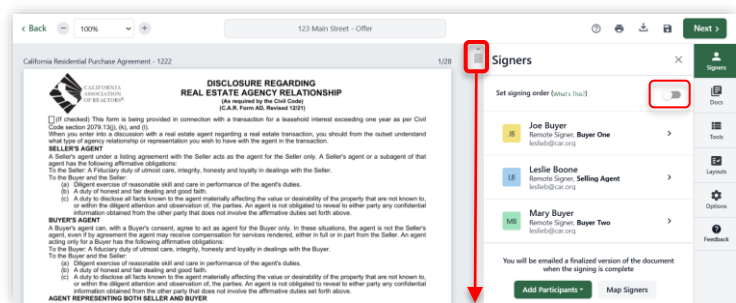
3. Click **Select** at the bottom right, and the system will automatically place the signature, date, and initial tags on most forms for you.



4. **Set Signing Order** = (optional) click the slider above the signer names to turn on the numbering order, if desired.

It is recommended to scroll through the documents and do a visual check to see if there are any documents that require tags to be placed manually.

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



Docs

Add and remove forms and documents, rearrange the order of the documents, upload PDF files, if needed.

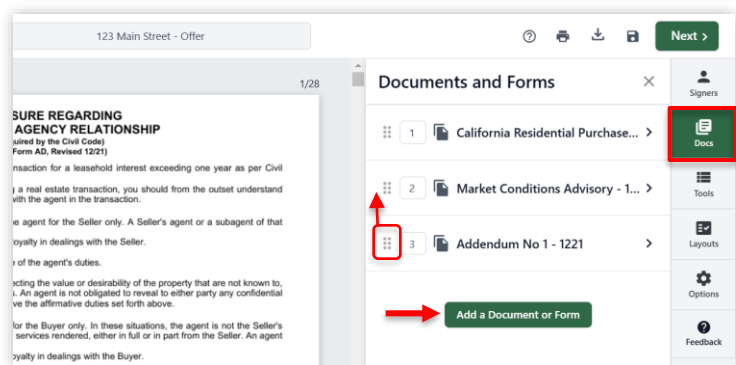
DOCS

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

Add a Document or Form

2. Click **Add a Document or Form** to add a form from your transaction or upload a PDF file.

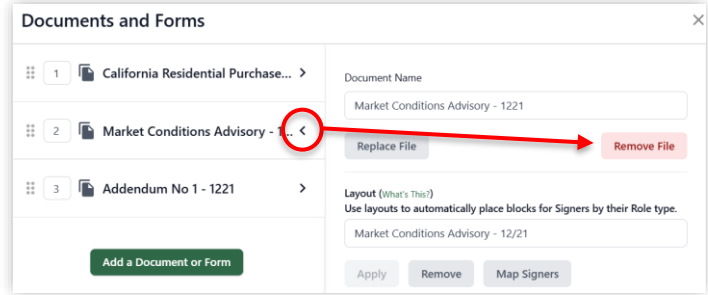
3. **To rearrange the order** – click and drag the dots to the left of the document name to rearrange the order of the documents.



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

Remove File

NOTE: This removes the form/document from your signing packet only, not from your transaction.



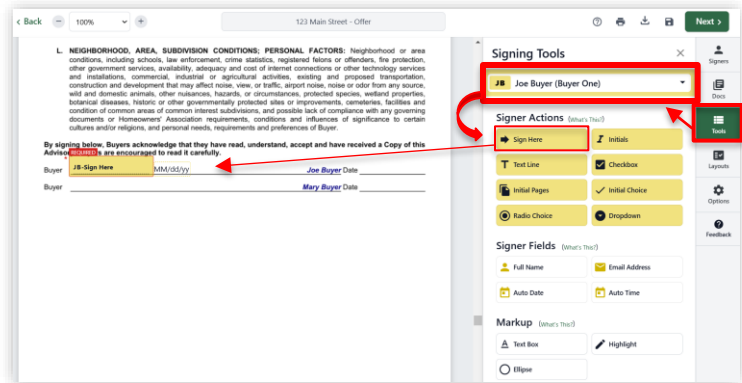
Tools

Place tags manually for individual signers, if needed.



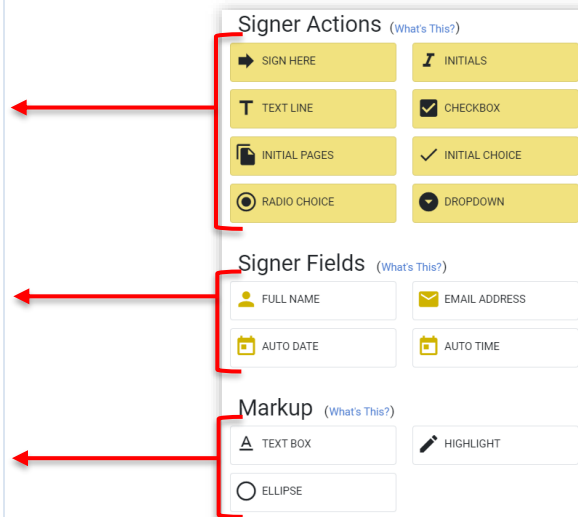
1. Click **TOOLS** on the right side.
2. Select the signer from the dropdown menu at the top.
3. Click and drag a tag from **Signer Actions** or **Signer Fields** over to the document.

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:

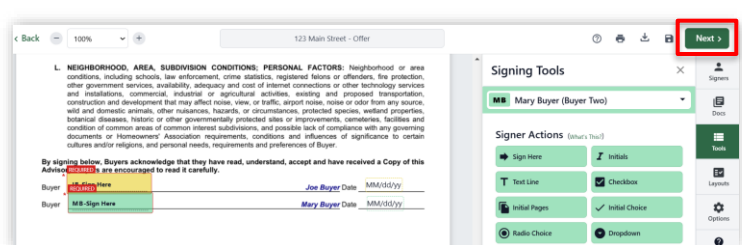
- **Signer Actions**
 - Click and drag to the document
 - *Signer specific*
 - Requires signer interaction to complete
- **Signer Fields**
 - Click and drag to the document
 - *Signer specific*
 - Does not require signer interaction to complete
- **Markup**
 - Click the markup item, then click on the 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

Next >

1. Click **Next >** at the top right when you are ready to send your documents for signature.

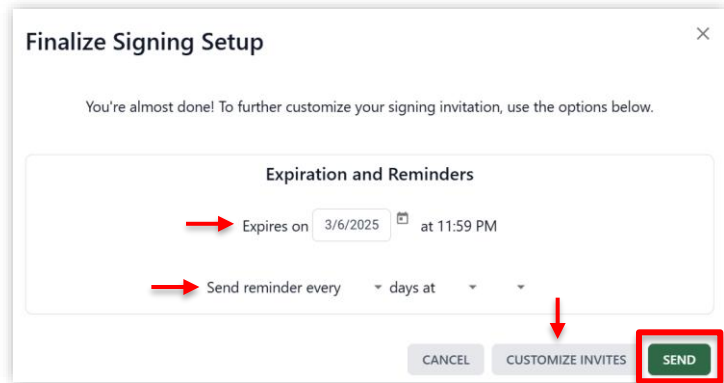


2. **Expires on** – (optional) click the **calendar icon** to set an expiration date for the signing packet. Default is 30 days.

3. **Send reminder** – (optional) 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 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

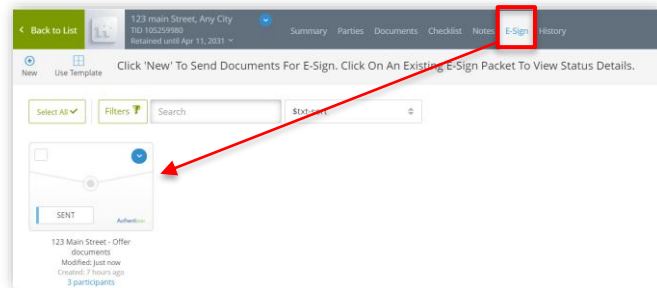
Expires on 3/6/2025 at 11:59 PM

Send reminder every [dropdown] days at [dropdown]

CANCEL CUSTOMIZE INVITES SEND

Track the Status of a Signing Packet

1. From the **E-Sign** tab inside your transaction, click on a signing envelope to open it.



123 main Street, Any City
TID 105259980
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.

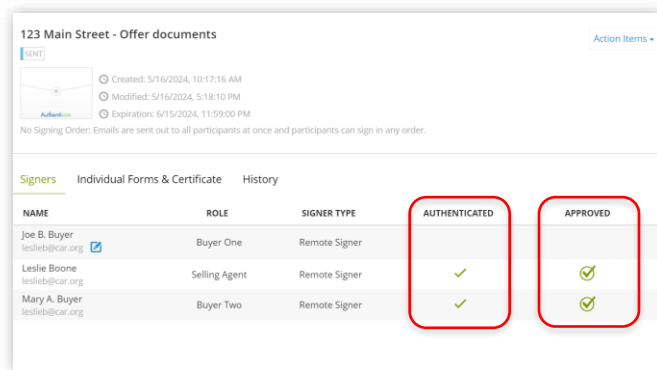
Select All Filters Search \$0.00

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

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

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

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



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

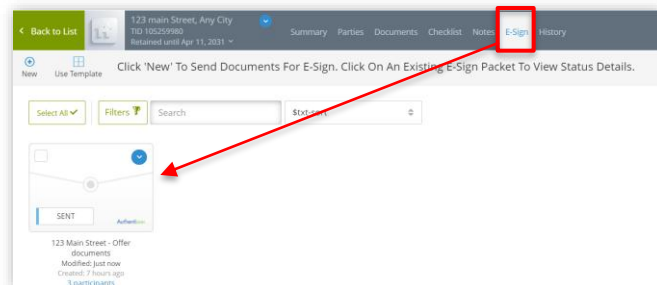
No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

Signers Individual Forms & Certificate History

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

Edit a Signing Packet

1. From the **E-Sign** tab inside your transaction, click on a signing envelope to open it.



123 main Street, Any City
TID 105259980
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.

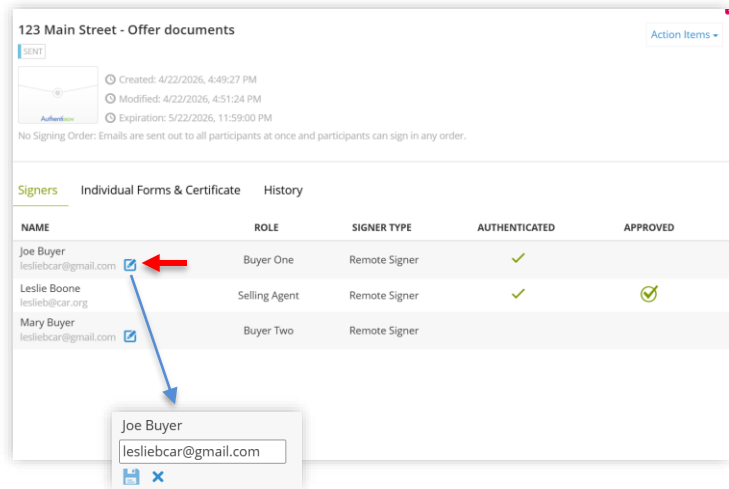
Select All Filters Search \$0.00

SENT 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*.
2. Click  to save your changes.



123 Main Street - Offer documents

Created: 4/22/2026, 4:49:27 PM
Modified: 4/22/2026, 4:51:24 PM
Expiration: 5/22/2026, 11:59:00 PM


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

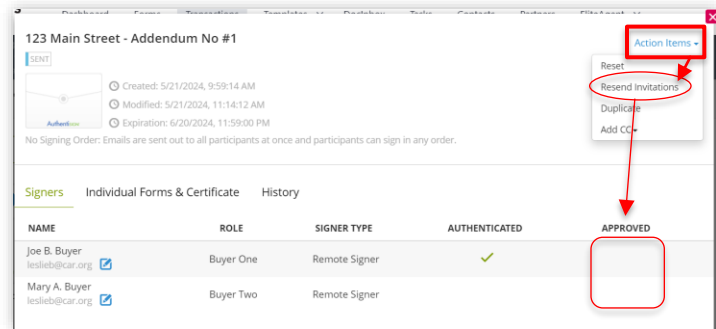
NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe Buyer lesliebcar@gmail.com	Buyer One	Remote Signer	✓	
Leslie Boone leslieb@car.org	Selling Agent	Remote Signer	✓	✓
Mary Buyer lesliebcar@gmail.com	Buyer Two	Remote Signer		

Joe Buyer
lesliebcar@gmail.com

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 (no checkmark in the Approved column)*.



123 Main Street - Addendum No #1


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.

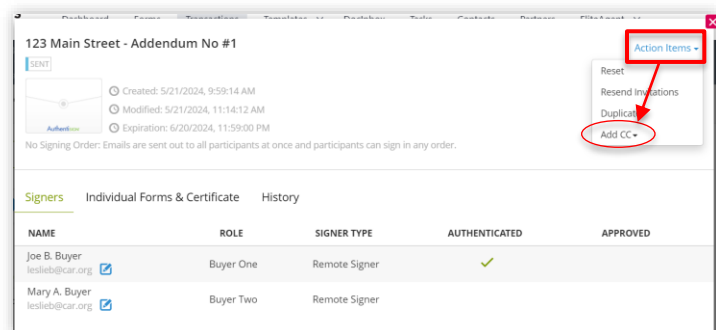
NAME	ROLE	SIGNER TYPE	AUTHENTICATED	APPROVED
Joe B. Buyer leslieb@car.org	Buyer One	Remote Signer	✓	
Mary A. Buyer leslieb@car.org	Buyer Two	Remote Signer		

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 menu and complete the necessary fields.

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



123 Main Street - Addendum No #1


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

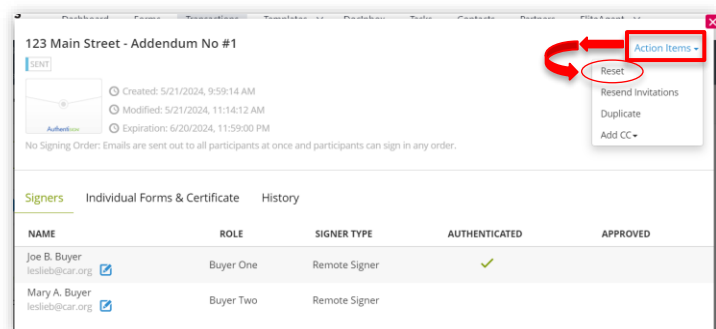
No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

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/Remove Documents or VOID

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

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



123 Main Street - Addendum No #1

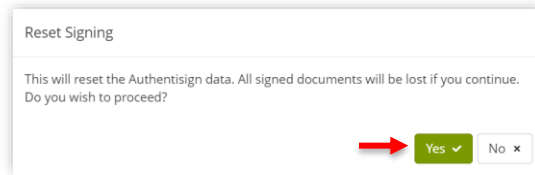
Created: 5/21/2024, 9:59:14 AM
Modified: 5/21/2024, 11:14:12 AM
Expiration: 6/20/2024, 11:59:00 PM

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

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 **Yes** to continue.

NOTE: Resetting the signing packet will remove all participant fields from the documents, including signatures and fillable answers for all participants, even those who have already signed.

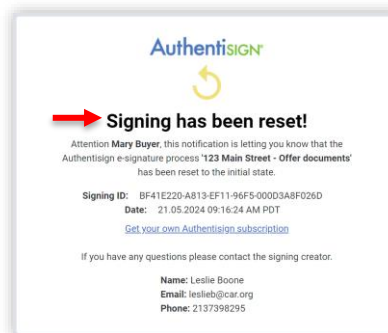


The system will immediately open the signing packet allowing you to edit the packet.

3. If you don't want to edit the signing packet right now, click **< Back** at the top left and select **Don't Save** from the menu to return the packet to DRAFT status in the E-Sign tab of your transaction.



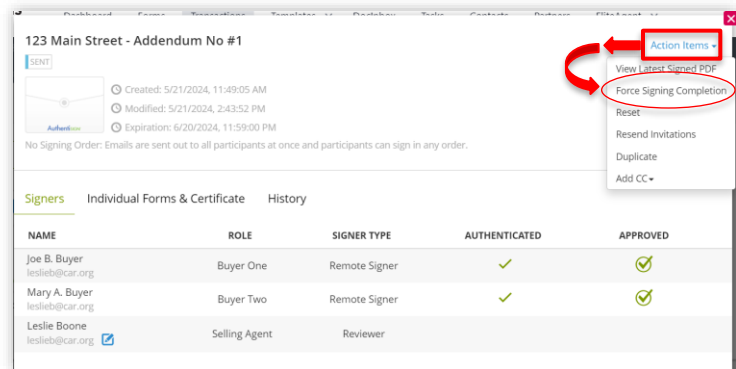
If any participant starts the signing again from the original email invitation they received, Authentisign will notify the participant that the signing has been reset.



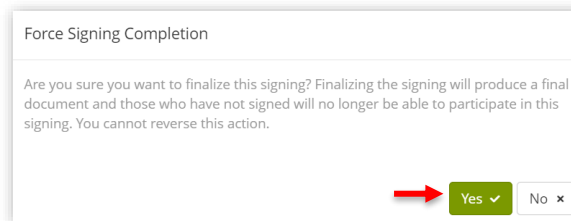
Force Signing Completion

You will have the option to "Force Signing Completion" after at least one participant has signed. This function allows you to complete the signing packet and produce a final document with only the participants who have already signed.

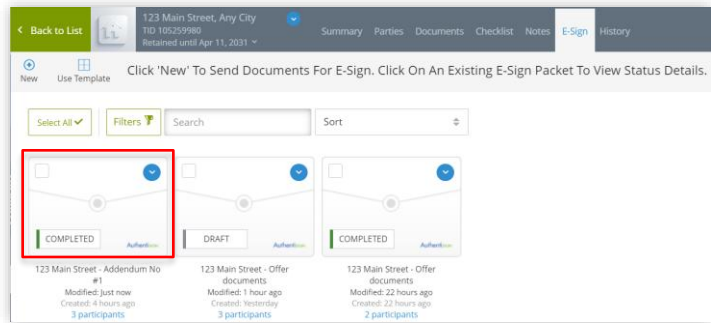
1. Click **Action Items** at the top right and select "Force Signing Completion" from the menu.



2. Click **Yes** to continue.




3. The system will finalize the signing packet and show the status “COMPLETED”.



Delete a Signing Packet – DRAFT

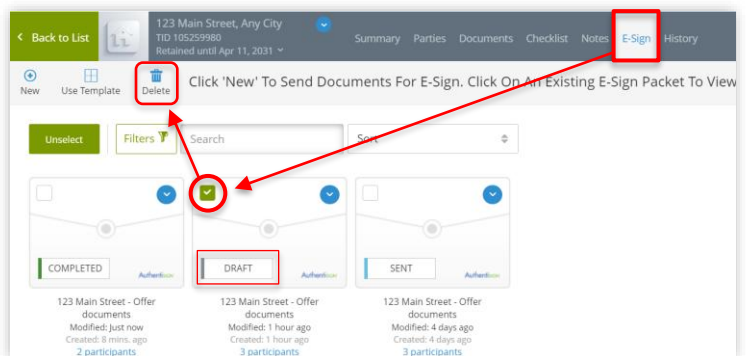
IMPORTANT: Only signing packets with a status of “DRAFT” can be deleted from your transaction.

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

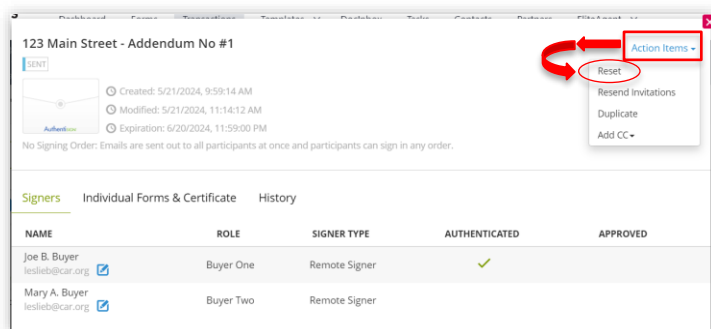
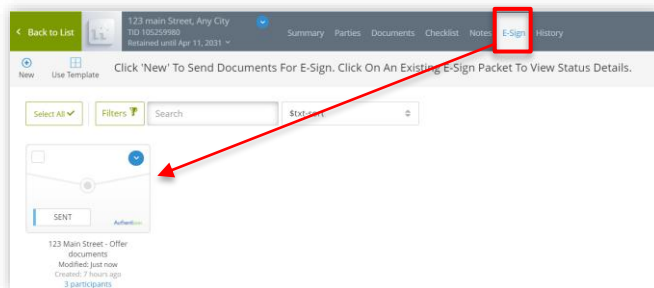


Delete a Signing Packet – SENT

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.

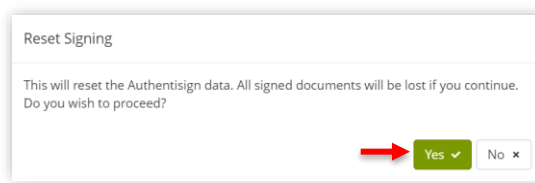
1. From the **E-Sign tab** inside your transaction, click to open the signing packet you sent for signature.

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 all participants, even those who have already signed.




The system will immediately open the signing packet.

4. Click  at the top left 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.

