



After clicking the e-Sign>Sign option and selecting the documents to be signed, add signers during the **Select Parties** step in order to set up the list of people who are signing or initialing at least one page in the selected packet of contracts at this time.









First click on the Add Person button on the Select parties stage of the signing process




Next Select an option to browse where the contact is coming from.

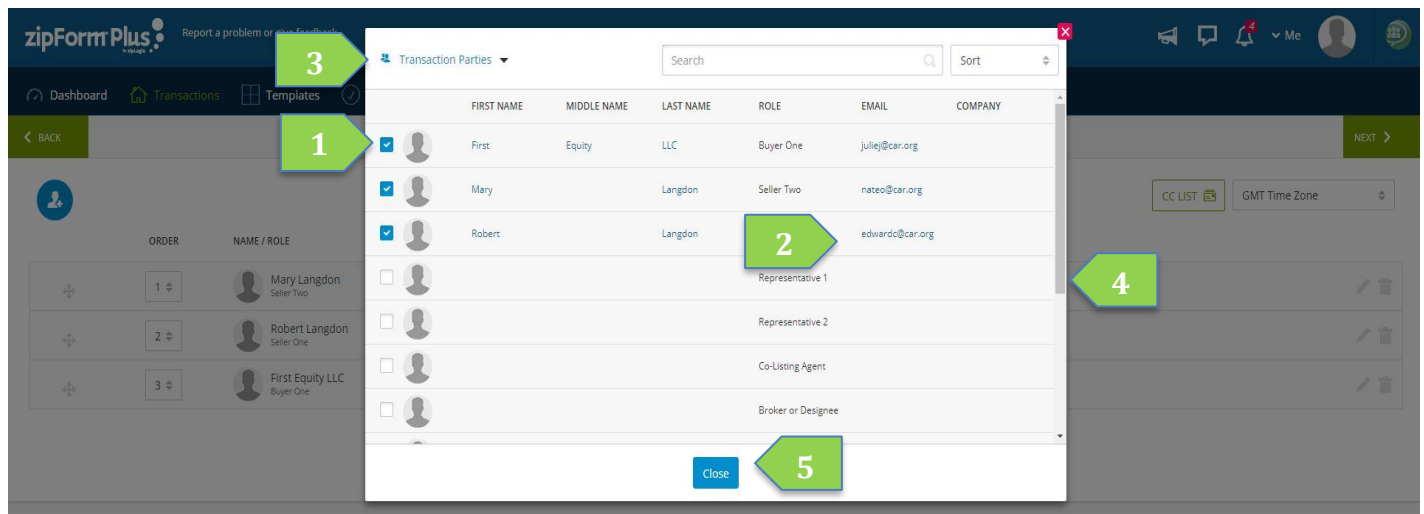
## Add person

Select an option below to browse for a contact

|  |  |   |   |
|--|--|---|---|
| <br>Transaction Parties | <br>Service Providers | <br>zipCRM™ Contacts | <br>zipLogix™ Contacts |
| <br>Top Producer        | <br>Google Contacts   | <br>Microsoft        | <br>Yahoo Contacts     |

  
Create New

Close



## Select Signers

1. Click the **check box** next to the signer's name
2. **Click and type** to edit a signer's name and email address  
*Note: Editing a signer's information will not change what is entered in zipForm® forms. Editing information will only change the signer's contact information for delivering this packet of documents sent for signing.*
3. Use the **Transaction Parties, Service Providers, zipCRM™, zipLogix™ Contacts, Top Producer, Google Contacts, Microsoft, Yahoo Contacts and New** tabs to add a signer not on this list
4. Use the **scroll bar** to scroll down to additional signers, if necessary
5. Click **Close** when finished in order to select signer options

**Tip:** Use the **Transaction Parties** to select signers. The **Transaction Parties** are signers with areas to sign, initial, or fill out text or check boxes on the document. zipForm® automatically imports their information from the forms or the **Parties** tab, including the signer's email address. The signer's role indicates that they will sign or initial and areas on the form marked for that role (Seller One, for example).



Once you have selected the signers, you can adjust the delivery order, add the CC and identity verification options, and add people who are not signing documents to the CC List. Anyone on the CC List will automatically receive an email with the fully executed documents attached as PDFs after all parties have signed.

**Tip:** Click and drag a signer on top of another signer to have two (or more) signers emailed their link to start signing at the same time. All selected signers must finish signing before the packet of contracts will continue to the next party on the list.

## Signing Party Options

1. The signer's order number will determine when documents are delivered to this signer for their signatures  
**Note:** *Contracts continue to the next signer only once the signers before them have signed.*
2. **Click and drag** to change the signing order  
**Note:** *If one signer is dragged on top of another signer, they will be assigned the same signing order, and provided the link to start signing at the same time.*
3. Check the **CC box** next to a signer to automatically send this signer an email with the fully executed documents attached as a PDF once all signatures are completed.
4. Click the **CC list** to add the email address of a non-signer who should be automatically emailed a copy of all documents as a PDF attachment once the signing is complete.
5. Check the box for **Text Message Authentication** and enter a cell phone number in order to text a code to the signer's cellphone which they must enter before they are able to sign.
6. Click **Next** to continue to the Add Signatures page and identify where signers will click to sign or initial.