ZOOM
REALTY GROUP

ZOOM AI 3.0 · ZOOM REALTY GROUP

Transaction Manager

Owner's Manual

Contract to closed, with Pulse as your autonomous transaction coordinator. Talk to it, approve what it does, and spend your time with clients instead of paperwork. The step by step guide to every screen, every button and every message.

READ THIS FIRST

Every file, handled.

A contract is a promise with a calendar attached. Miss one date and your buyer can lose a deposit, your seller can lose a closing, and you can lose a client who would have sent you three more.

For most agents the file is where the joy goes to die. Forty boxes to type, a checklist nobody trusts, documents in four different inboxes, and a commission that waits on paperwork you forgot existed. That is time you are not on the phone, not in front of a buyer, not winning the next listing.

Transaction Manager 3.0 changes the deal you make with your files. You send the contract. Pulse, the assistant built into ZOOM AI, reads it, builds the deal, counts every deadline, files what comes in, watches the dates every morning, fills the forms, chases the signatures and writes the messages. It works every file by itself and answers when you say "Hey Pulse". You check what Pulse found, you approve what leaves the building, and you talk to your client. That is the job now.

How this manual works

Read the Quick Start today. Then keep this manual close and open it to the page you need. Every task is numbered steps with a real screen from ZOOM AI next to it. The people and addresses in the pictures are made up.

Quick Start TWO PAGES	Your first deal in ten minutes and your daily five minutes on your deals. If you read nothing else, read this.
Part One THE SYSTEM	What Transaction Manager 3.0 is, what Pulse does on its own and what waits for you, the deal stages, where to find it, and My Deals.
Part Two STEP BY STEP	Every task from the contract to the Welcome Home: the Deal page, deadlines, documents, email-in, the checklist, people, the client portal, Pulse's cards, compliance, the CDA, closing, the Forms Library and saved packets, ZOOM Sign (counters, the other side, in person, Spanish) and extensions.
Part Three HEY PULSE	Talking to Pulse hands-free, what it sees and remembers, car mode, and everything you can say about your deals.
The back REFERENCE	Questions and fixes, and a one-page cheat sheet.

THE ONE RULE

Nothing leaves ZOOM AI without you. Pulse works your files on its own: it drafts, files, counts, fills and reminds. Every text, every email, every signature request and every CDA waits for your tap or your "yes". Pulse never approves a document, never submits a CDA and never changes a contract date on its own.

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QUICK START

Your first deal in 10 minutes.

Open ZOOM AI and tap **Transaction Manager** in the sidebar (page **11** shows where). You land on My Deals. Have the signed contract handy as a PDF or a clear photo.

ONCE PER DEAL

Contract to a working file

1. **Tap I Have a Contract.** The big blue button in the top right of My Deals.
2. **Drop the contract on the card.** A PDF from the signing platform works best. Pulse reads it in about a minute.
3. **Check the highlighted rows.** Pulse marks every field **Read**, **Check** or **Not sure**. Fix or confirm the ones in color.
4. **Tap Approve and Build the Deal.** Pulse saves the deal, the people, the money, every deadline and files the contract in Documents. Nothing is sent to anyone.
5. **Turn on the Client Portal** on the Deal page and tap **Send Link**, so your client can follow along.
6. **Drop in what you have.** Your brokerage agreement, the compensation agreement, the deposit receipt. Drag them anywhere on the Deal page.
7. **Save deals@zoomai.app** in your phone contacts. From now on, forward every document to it.
8. **Turn on Hey Pulse** once: Pulse settings, **Hands-free "Hey Pulse"**. From then on, just talk (page **58**).

NO CONTRACT YET?

Two other ways in

1. **Say it.** "Hey Pulse, I have a contract on 123 Main." Pulse opens the same contract card for you. Drop the file on it.
2. **Start Without a Contract.** Five boxes: address, side, client name, client phone, closing date. Tap **Create Deal**. Add the rest when you know it.
3. **A new listing?** Tap Start Without a Contract, then **This is a new listing instead**. When an offer is accepted, set the stage to Under Contract and drop the contract on Pulse's card.

Whichever way you start, the Deal page is the same: Timeline, Documents, People and Money, one scroll.

QUICK START

Your daily 5 minutes.

Every morning Pulse checks every one of your deals. Your job is to open My Deals once, read what Pulse found, and tap.

EVERY MORNING

Five minutes, five moves

1. **Say "Hey Pulse".** The first time each day, Pulse greets you and gives you the roll call: how many deals, how many need you today.
2. **Read Pulse Needs You** at the top of My Deals. Red first: a deadline passed and its proof is not in the file.
3. **Answer the cards.** Each one shows the exact text and who it goes to. Tap **Approve**, **Edit** or **Skip**.
4. **Clear the red.** **Add the proof** or **Mark done**. If the document exists, forward it to deals@zoomai.app.
5. **Look at Coming Up This Week.** Any date in two days or less gets a call to your client today.

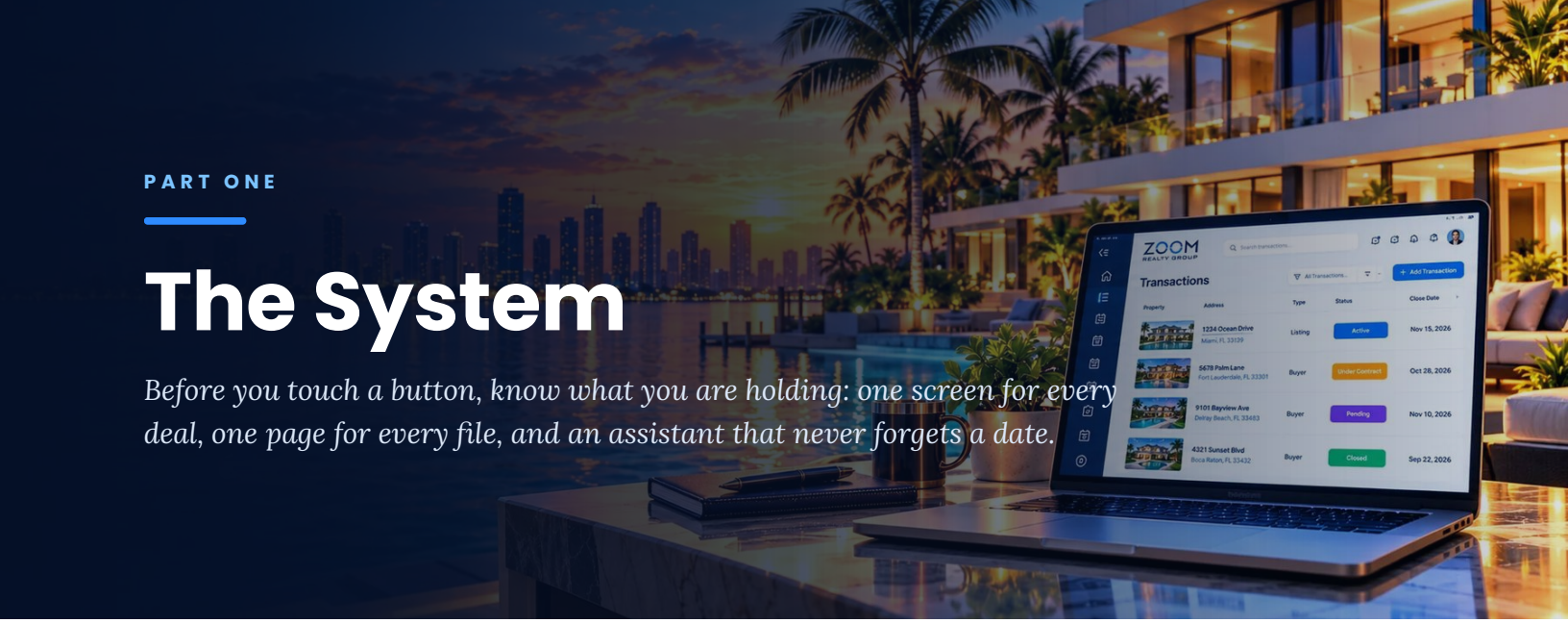
WHEN IT HAPPENS

The moments that matter

1. **A document arrives.** Forward it to deals@zoomai.app or drop it on the deal. Pulse files it and ticks the checklist.
2. **The broker sends one back.** You get a text with the reason. Fix it and file the new copy on the same deal (page **32**).
3. **Clear to close.** Pulse drafts your CDA on the Money card. Check it, tick the box, tap **Submit CDA** (page **33**).
4. **After closing.** Upload the settlement statement. Once the CDA is approved, Pulse closes the file and your client's portal says Welcome Home.
5. **Monday.** If ZOOM texts you a list of deals that look closed, close them that day (page **56**).

THE HABIT THAT PAYS

Five minutes a morning keeps every file clean, every client informed and every commission moving. The agents who close the most are not the ones who work the hardest on paperwork. They are the ones who let the system do it and spend the hour they saved on the phone.



PART ONE

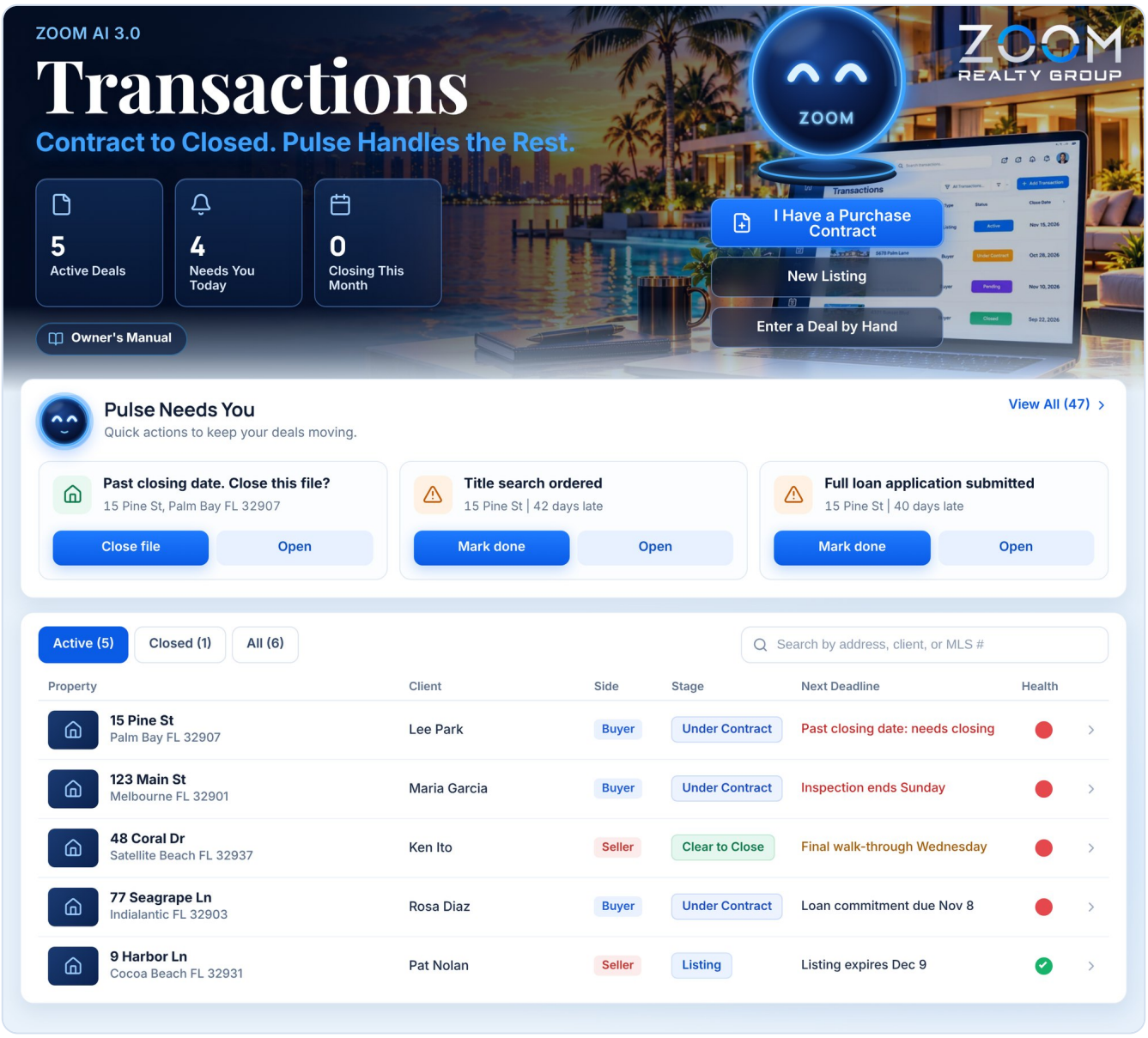
The System

Before you touch a button, know what you are holding: one screen for every deal, one page for every file, and an assistant that never forgets a date.

What Transaction Manager 3.0 is

Transaction Manager is where every deal you have under contract, every listing and every closed file lives in ZOOM AI. Version 3.0 is a new look and a new way of working over the same deals, the same documents and the same CDA you already know. Nothing you entered before is lost: every old deal opens on the new Deal page.

It is built on one idea: **you should not type what is already written in the contract.** The old way was a 41-box form, an 11-tab deal card and a 71-item checklist. The new way is one upload, one card to check and one page per deal.



MY DEALS The Transactions 3.0 home: the hero with your numbers, Pulse Needs You, and your deals

Here is what the system does for you, in the order a deal happens:

1. **Reads the contract.** Address, side, buyer, seller, price, deposits, financing, lender, title, the other agent, and every deadline counted with the Florida rules.
2. **Builds the file.** The deal, the people, the timeline, the checklist and the client portal, in one tap.
3. **Files the paper.** Drop a document on the deal or email it to deals@zoomai.app. Pulse reads each one, names its type and ticks the checklist.
4. **Watches the dates.** Every morning Pulse checks every deal and puts what needs you at the top of My Deals.
5. **Writes the messages.** Deadline reminders to your client, document requests to the lender or title, status updates. You approve each one.

6. **Pre-checks compliance.** Pulse points at missing signatures, initials and blanks for the broker. The broker decides.
7. **Drafts the CDA.** From the deal and your commission terms on the ZOOM roster. You submit it, ZOOM admin approves it.
8. **Closes the file.** When the evidence is there, Pulse closes it, flips the portal to Welcome Home and lines up your review and referral asks.

Pulse is your transaction coordinator

A great transaction coordinator reads the contract once, builds the calendar, chases the paper and tells you what is late before it is a problem. That is exactly what Pulse does on every file, every day, without a fee per file. What Pulse never does is make a decision that belongs to you or to your broker.

PULSE DOES IT	YOU APPROVE IT	THE BROKER DOES IT
Reads the contract and fills the deal, the dates, the people and the checklist	The build card, before the deal is saved	Reviews the documents Pulse flagged and the files picked for a spot check
Counts and recounts every deadline, and says where each date came from	Any text or email that leaves ZOOM AI	Approves a document, or sends it back with a reason
Files every document you drop or email, and ticks the checklist when it is sure	Every signature request and every ZOOM Sign reminder	Reviews and approves every CDA, and marks it paid
Runs the morning sweep and your roll call	A change to the closing date	Sends the Monday close-out texts
Flags missing signatures, initials and blanks for the broker	Your CDA: you read Pulse's draft and tap Submit	
Drafts the CDA, closes a file when the evidence is there, and writes every step in the deal's activity, signed ZOOM Pulse	The review and referral asks after closing	

Autonomous, with you in charge

Pulse is not a feature you open. It is a coordinator that works every one of your files every day, whether you are in ZOOM AI or at a showing. Here is a deal from the contract to the review ask, and who does each part.

A DEAL, CONTRACT TO CLOSE

Pulse carries the file. You make the calls that matter.

1 The contract — YOU, PULSE

You drop it in or say it. Pulse reads it, counts every deadline, builds the deal.

2 Every morning — PULSE, YOU

Pulse checks every deal and writes the messages. You approve each card.

3 The paper — PULSE

Email deals@zoomai.app or drop it in. Pulse files it and ticks the checklist.

4 Signatures — PULSE, YOU, CLIENT

Pulse fills the forms, you send them, they sign. The signed copy files itself.

5 Compliance — PULSE, BROKER

Pulse points at a missing initial or a blank. The broker approves or sends back.

6 The CDA — PULSE, YOU, BROKER

Pulse drafts it near closing. You tap Submit, the broker approves it.

7 Closed — PULSE, CLIENT

Pulse closes it when the proof is there (Undo for 14 days). Welcome Home.

8 After closing — PULSE, YOU

Pulse lines up the review and referral asks. You approve each one.

PULSE Pulse does it · YOU You approve · BROKER The broker decides · CLIENT Your client

A DEAL, CONTRACT TO CLOSE Blue is Pulse, gold is you, navy is the broker, green is your client

What Pulse does by itself

Everything that stays inside ZOOM AI, Pulse does without asking: it reads, counts, files, ticks, flags, drafts and closes the obvious files, and it writes each step in the deal's activity, signed ZOOM Pulse, so you can always see what it did and why. Every morning it checks every deal; every 15 minutes it looks at your signatures in ZOOM Sign; once a day it looks for files ready to close.

What waits for you

Anything that leaves ZOOM AI or changes a promise in the contract waits for your tap or your "yes": a text or an email to anyone, a signature request, a new closing date, your CDA. You get a card with the exact words and who they go to, and after you approve you still have 10 seconds to stop it.

ON ITS OWN, OR WITH YOUR TAP

Pulse works inside ZOOM AI. What leaves it waits for you.



ON ITS OWN, OR WITH YOUR TAP The line Pulse never crosses without you

How Pulse reaches you

- **Pulse Needs You** on My Deals and on each deal: the cards that need a tap.
- **The roll call** the first time you talk to Pulse each day (page **31**).
- **A text or an email signed ZOOM Pulse** for the moments that matter: the broker sent a document back, a signer declined or stalled, everyone signed, Pulse closed a file, your CDA is approved. Never during quiet hours.
- **A call from Pulse**, in Pulse's own voice, when a critical deadline is missed and you have not opened ZOOM AI. Pulse calls you, never your client.

> AUTOPILOT, WHEN THE OFFICE TURNS IT ON
>
> The brokerage can let Pulse send one type of routine message on its own, for example the client's deadline reminder, inside quiet hours and the Do Not Contact rules. Pulse settings shows you which types are on and the exact wording of each. Until a type is turned on, every message is a card you approve.

The deal stages

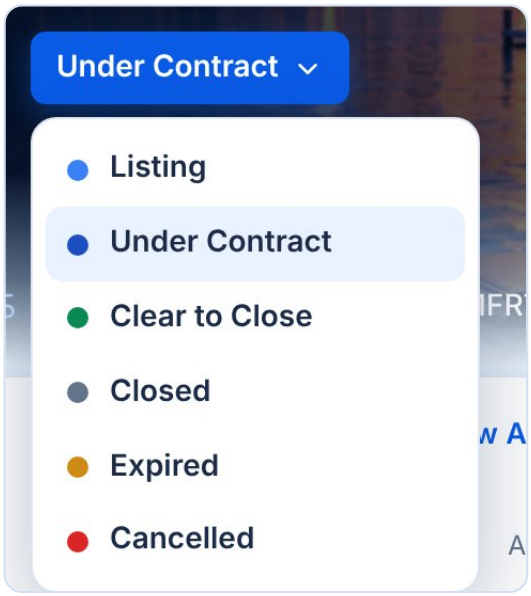
A deal is in exactly one stage. You see it as a colored chip on My Deals and as the stage button on the Deal page.

Listing YOUR LISTING, NO CONTRACT YET	Shows the list price, the list date and the listing expiration. When an offer is accepted, tap **Mark Under Contract** and drop the contract on Pulse's card.
Under Contract THE BUSY PART	From the effective date until title says you are clear. Every deadline, the checklist and Pulse's cards live here.
Clear to Close THE FINISH LINE	Set it with the stage button when title or the lender clears you. ZOOM AI saves today as the clear to close date on the timeline.
Closed DONE AND PAID	The file is closed. The client portal shows Welcome Home. Pulse may close it for you (page **35**).
Expired and Cancelled OFF THE ACTIVE LIST	A listing that expired or a deal that fell apart. ZOOM AI asks whether to archive it.

TO CHANGE THE STAGE

1. Open the deal.
2. Tap the stage button under the price (it says the current stage).
3. Pick the new stage. Closed, Expired and Cancelled ask whether to archive the file.

Clear to Close is only offered once a deal is under contract. Choosing Under Contract on a listing opens Pulse's contract card, so the contract builds the deal.



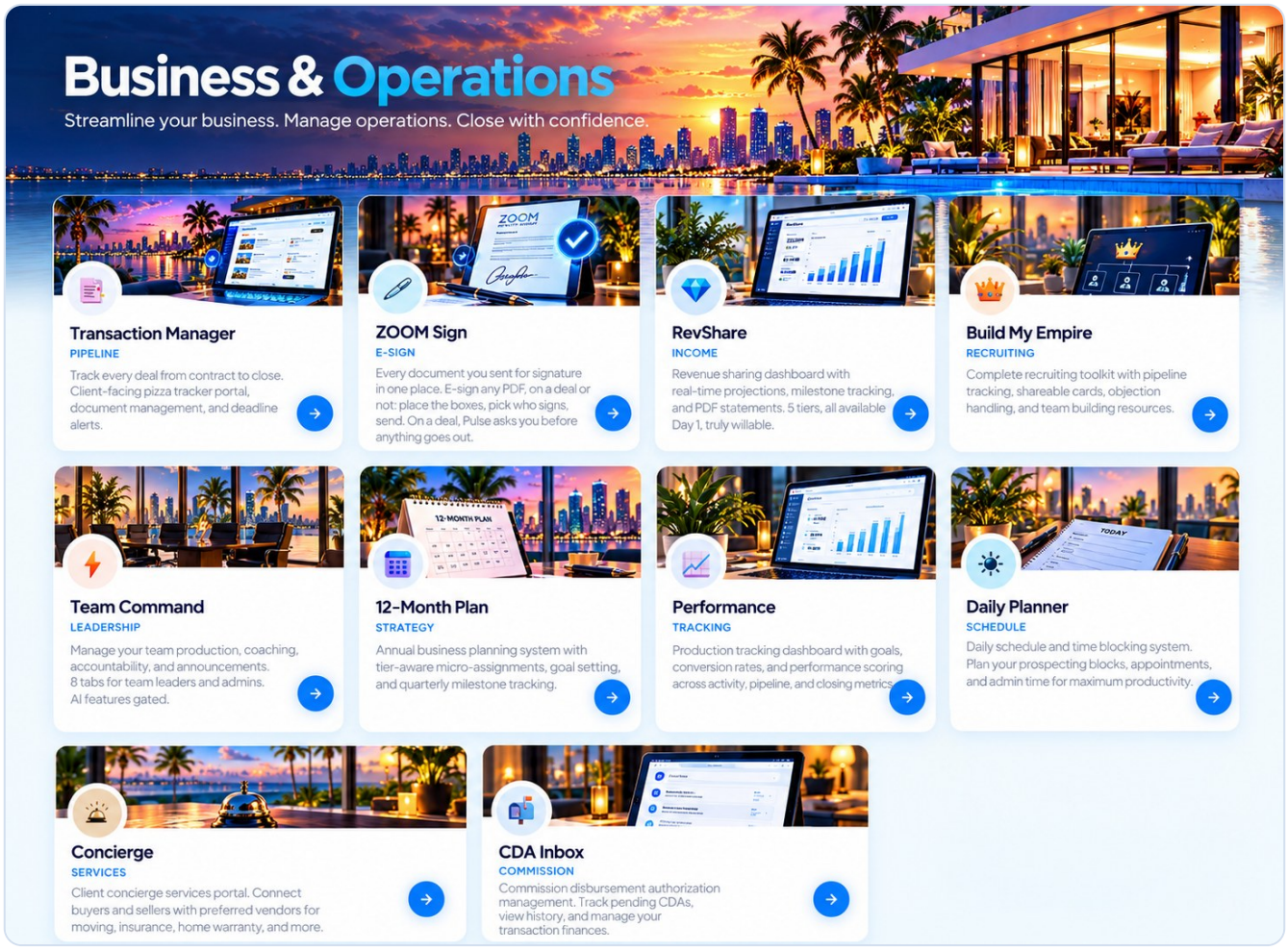
THE STAGE BUTTON Six stages, one tap

Where to find it

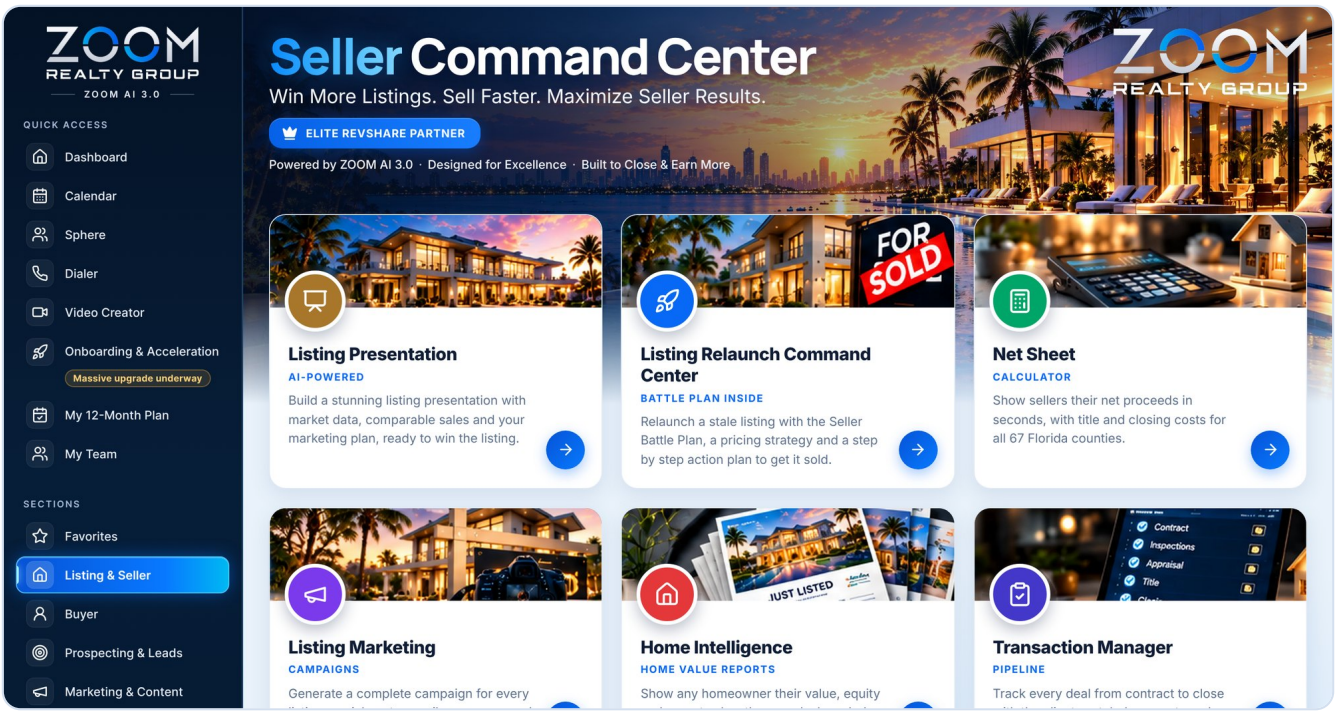
Transaction Manager is in two places in the sidebar, because a deal is both your business and your seller's sale:

- **Business & Operations.** Tap the group in the sidebar, then **Open section** on the **Transaction Manager** card. The **ZOOM Sign** card sits next to it.
- **Listing & Seller.** The Transaction Manager card is also in the Seller Command Center, next to your listing tools.

- **A link.** Every text ZOOM sends you about a deal carries a link (zoomai.app/?tx=...). Tap it and the Deal page opens.
- **Pulse.** Say "Take me to my deals."



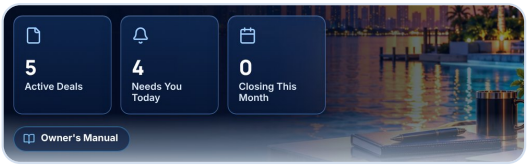
BUSINESS & OPERATIONS Tap the group in the sidebar, then Open section on Transaction Manager or ZOOM Sign



LISTING & SELLER Transaction Manager in the seller area

THIS MANUAL, ANY TIME

The **Owner's Manual** button sits in the top of My Deals, under your numbers, and next to **Back to My Deals** on every Deal page. It opens this PDF in a new tab.



OWNER'S MANUAL In the My Deals hero

My Deals, screen by screen

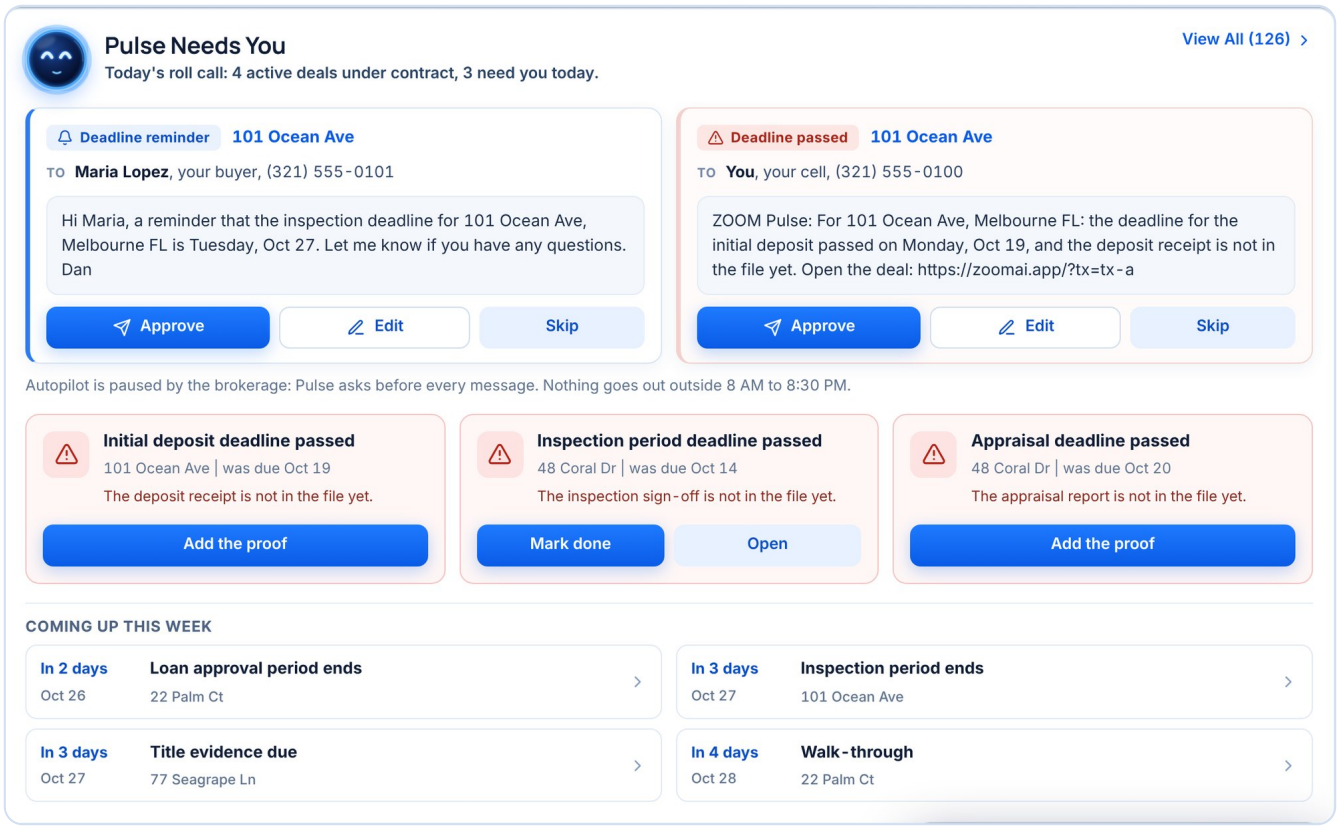
My Deals is the one list of everything you have going. Read it top to bottom.

1 · THE HERO

Three numbers: **Active Deals** (listings and deals under contract), **Needs You Today** (how many deals have something waiting for you) and **Closing This Month**. On the right, the Pulse ball, **I Have a Contract** and **Start Without a Contract**.

2 · PULSE NEEDS YOU

The short list of what needs you today, across all your deals. Pulse's message cards come first, then a deadline that passed with its proof missing (red), a file past its closing date, a required checklist item that is late, a deadline today or tomorrow, and a document whose type ZOOM AI was not sure of. Each card has one button that does the job and an **Open** button. **View All** shows the rest. Under it, **Coming Up This Week** lists every deadline in the next seven days.



PULSE NEEDS YOU Message cards, red deadline cards and Coming Up This Week

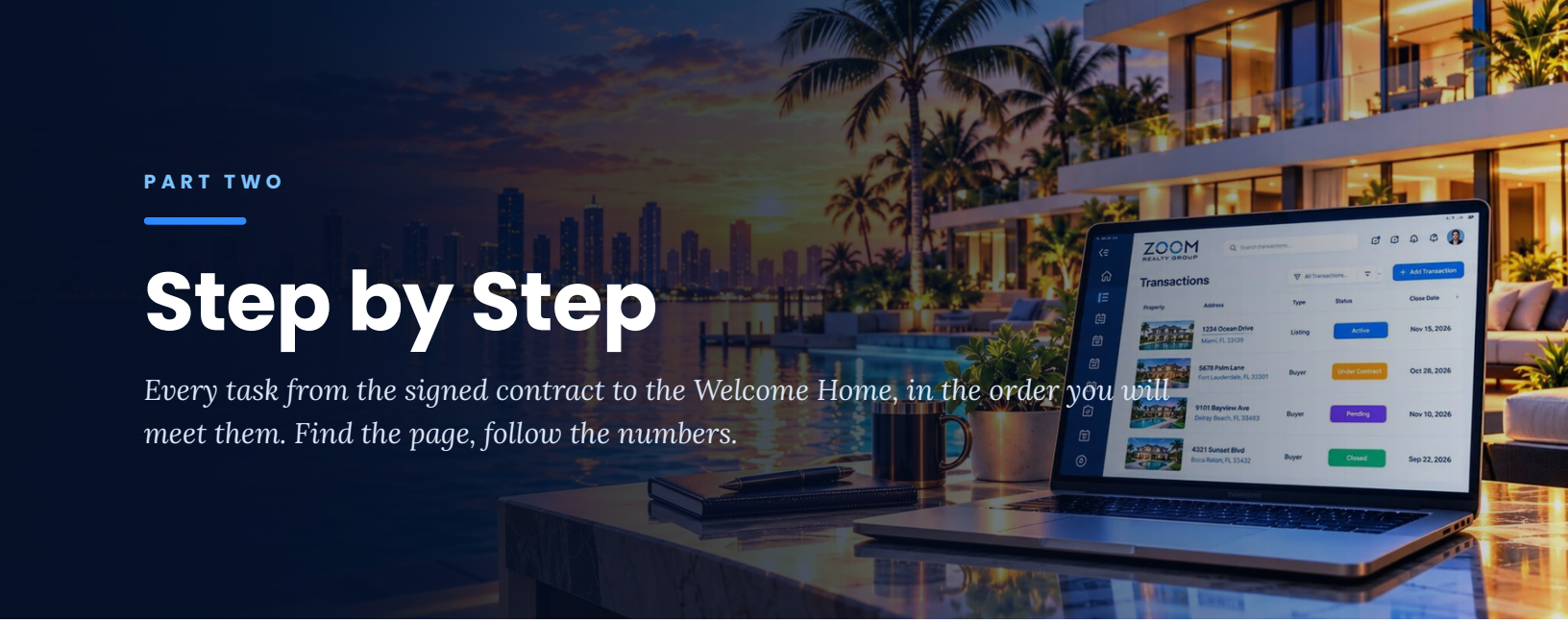
3 · EMAILED IN AND TODAY'S ROLL CALL

When you email documents to deals@zoomai.app, anything Pulse could not place waits in **Emailed In** (page **24**). **Today's Roll Call** shows each deal with what moved since yesterday, what is due and what is late (page **31**).

4 · YOUR DEALS

One row per deal: the property, the client, your side, the stage, the next deadline in plain words and the health dot. Tap a row to open the deal.

- **Active, Closed, All.** Active is the default and is sorted by the next deadline, the most urgent first.
- **Search** looks at every deal, archived ones too, by address, client or MLS number.
- **Next Deadline** and the **health dot** are explained on page **21**.



PART TWO

Step by Step

Every task from the signed contract to the Welcome Home, in the order you will meet them. Find the page, follow the numbers.

Start a deal: three ways

Pick the one that fits the moment. All three end on the same Deal page.

Way one: upload the contract and let Pulse build it

1. On My Deals, tap **I Have a Contract**.
2. Drop the signed contract on the card, or tap it to choose the file. A PDF, a JPG or a PNG photo works. On a listing, Pulse puts the contract on that same deal.
3. Wait while Pulse reads it. Then check the build card (next page) and tap Approve.

FOR A CLEAN READ

The PDF from the signing platform reads best. For a photo, take each page flat, sharp and in good light. Pulse tells you plainly when a file is too small, too large (over 32 MB), blurry, an iPhone HEIC photo, or not a purchase contract. Nothing is saved until you approve.

Way two: say it to Pulse

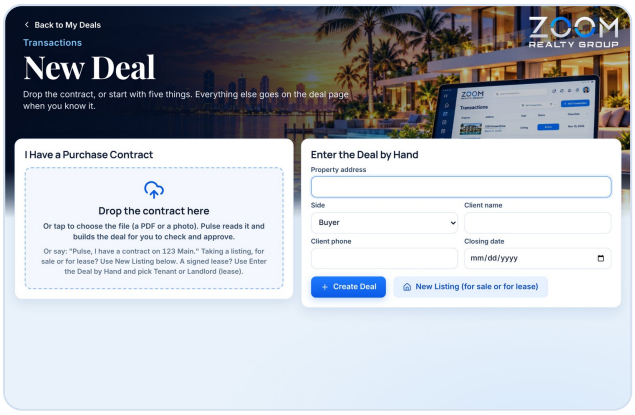
1. Say **"Hey Pulse, I have a contract on 123 Main."** ("I got a contract" and "we have a new contract at ..." work too.)
2. Pulse answers: "Great. I opened a new deal card for 123 Main. Drop the contract on it, a PDF or a photo, and I will read it and fill in the deal."
3. Drop the file on the card and check what Pulse found.

In car mode Pulse waits: it asks you to open Transactions and drop the contract when you are parked.

Way three: Start Without a Contract

1. Tap **Start Without a Contract**.
2. Fill the five boxes: property address, side (Buyer, Seller or Dual), client name, client phone and closing date. Address and client name are required.
3. Tap **Create Deal**. The Deal page opens.
4. Later, drop the contract on the deal, or set the dates on the timeline yourself.

For a **new listing**, tap **This is a new listing instead** under the form. The listing form asks for the address, the seller, list price, list date, expiration, phone and email.

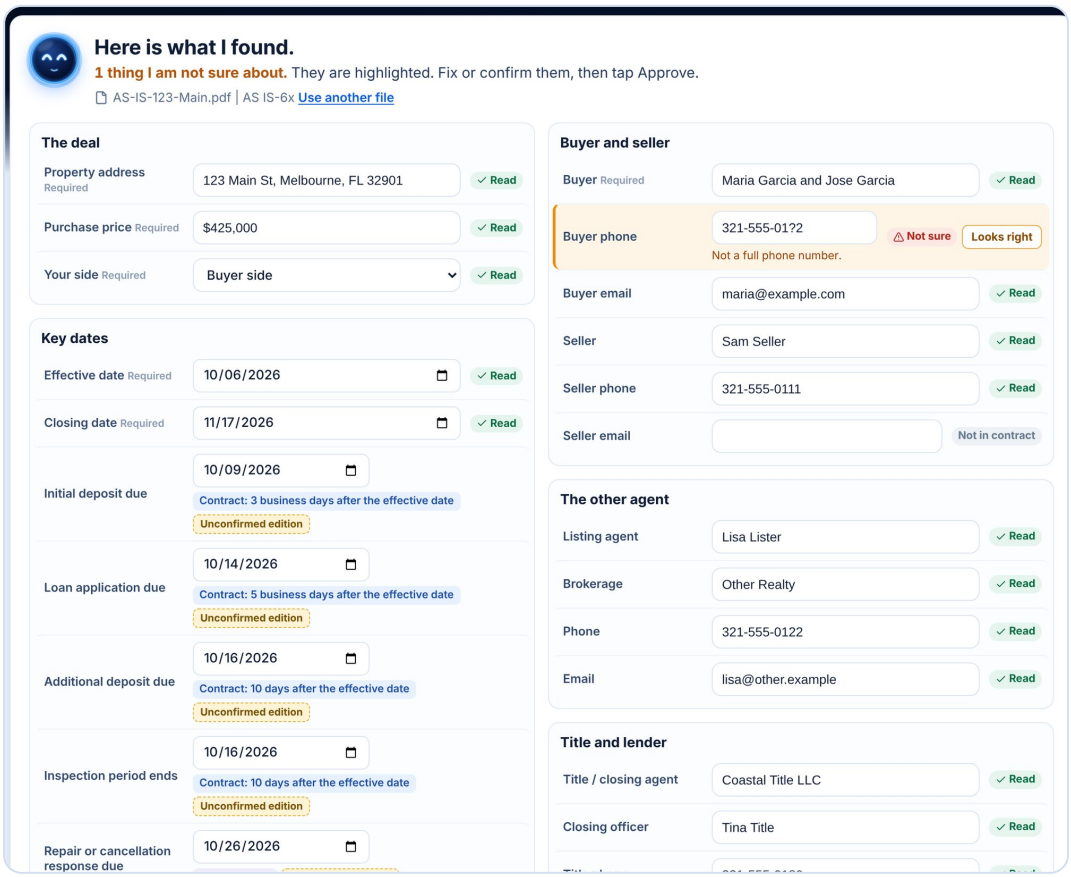


NEW DEAL Drop the contract, or start with five things

Check Pulse's build card and approve it

The build card is Pulse saying: "Here is what I found." Every field has a mark, so your eyes go only where they are needed.

MARK	WHAT IT MEANS AND WHAT YOU DO
Read	Pulse read it clearly from the contract. Glance and move on.
Check	Pulse read it but wants your eyes, for example a number of days the form prints when the blank was empty.
Not sure	Highlighted. Handwriting, a smudge or a number that does not add up. Fix the box, or tap **Looks right**.
Not in contract	The contract does not have it. Type it if you know it, or leave it.



THE BUILD CARD The deal, key dates with their source, buyer and seller, the other agent, title and lender

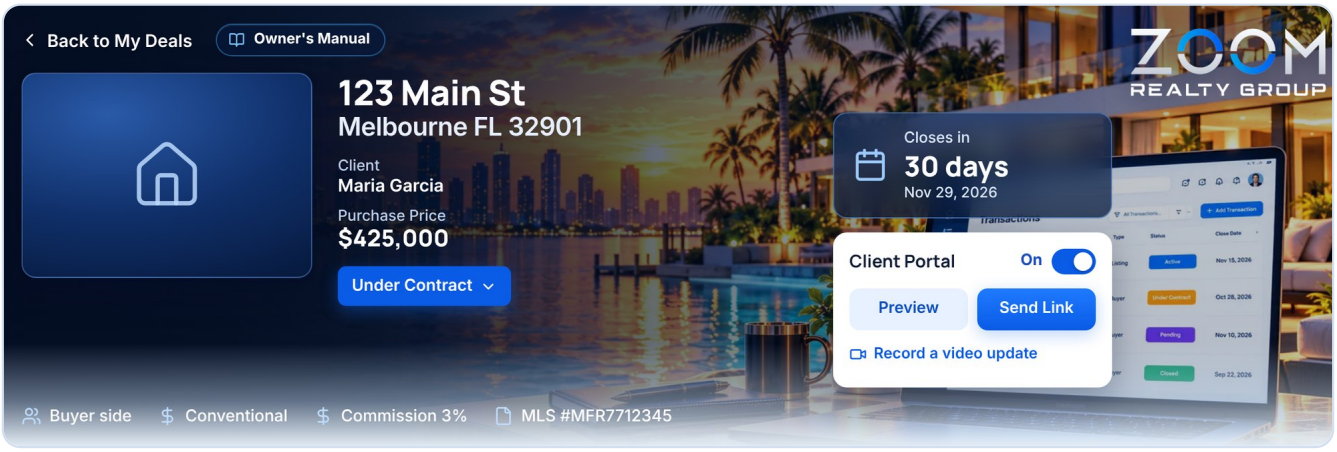
1. Read the sentence at the top: it says how many things Pulse is not sure about.
2. Fix or confirm each highlighted row. **Required** rows (address, price, your side, effective date and closing date) must be filled.
3. Look at the **Key dates**. Each counted date says how it was counted, for example "Contract: 3 business days after the effective date", or **ZOOM default** when the contract left it blank. Change any date by typing in its box.
4. Tap **Approve and Build the Deal** (on a listing: **Approve: Put It Under Contract**). If anything is still open, the line under the button says what.

THE FLORIDA COUNTING RULES

Counted dates follow the Florida rules: business days for periods of 5 days or fewer, and a deadline on a weekend or a national holiday moves to the next business day. Until the office uploads the Florida forms, each counted date also says **Unconfirmed edition**. Approve builds the deal, the people, the timeline and files the contract. Nothing is sent to anyone.

The Deal page tour

One deal, one page, one scroll. On a computer the four cards sit side by side; on a phone they stack in the same order.



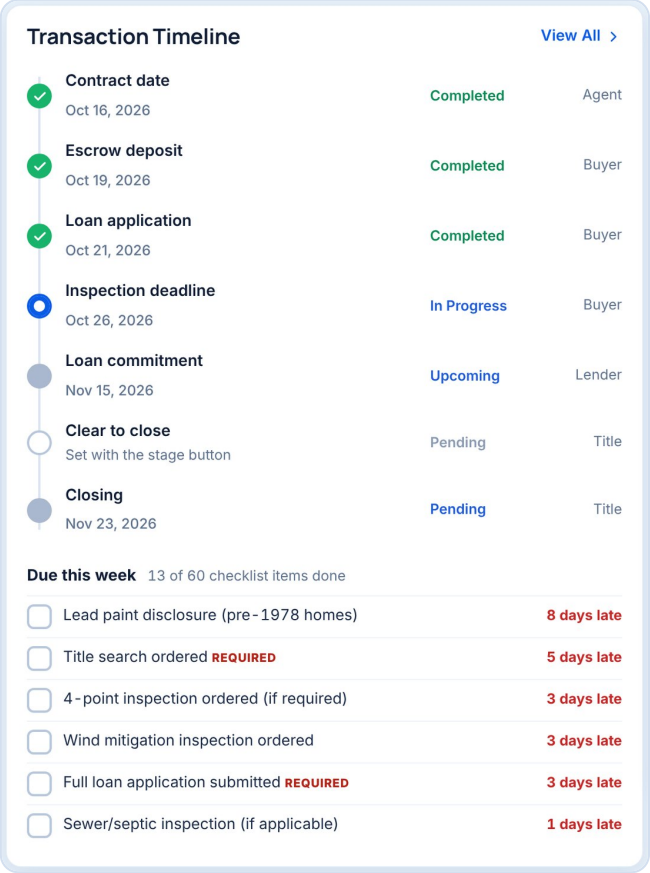
THE DEAL PAGE HERO Address, client, price, the stage button, Closes in, and the Client Portal card

THE HERO

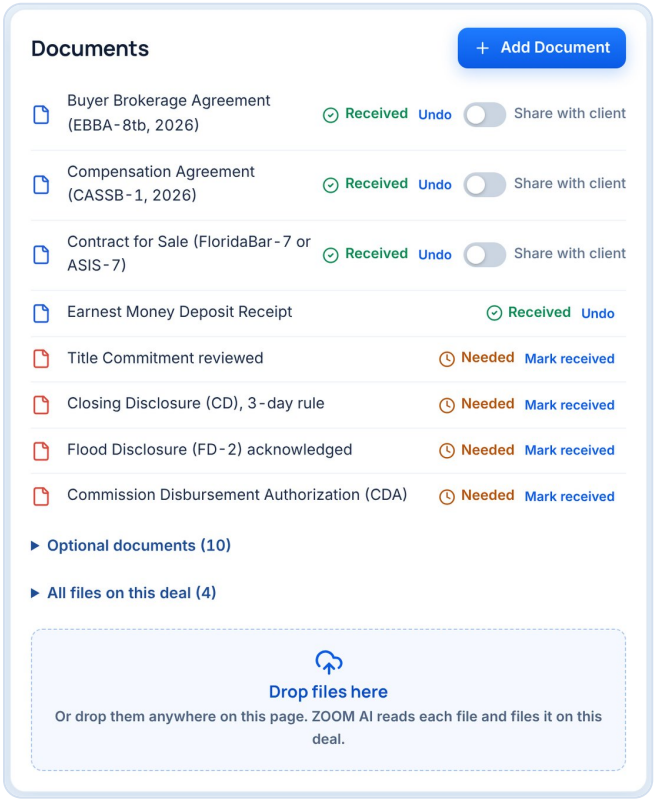
The address, the client and the price. The stage button. **Closes in** counts the days to closing (on a listing: **Listing expires in**). The **Client Portal** card turns the portal on and off (page **29**). Under it, the side, the loan type, the commission and the MLS number. At the top, **Back to My Deals** and **Owner's Manual**.

PULSE NEEDS YOU ON THIS DEAL

When Pulse has a message for this deal, the card sits right under the hero, with the exact text and who it goes to (page **30**). When documents arrive by email, **Pulse Filed Your Email** shows what was filed.



TRANSACTION TIMELINE Every date, its status and who owns it



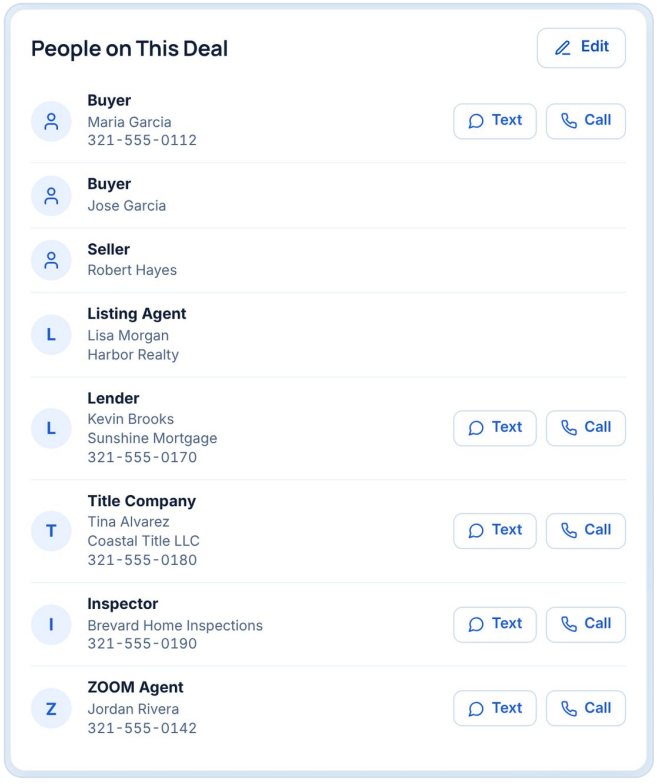
DOCUMENTS The checklist slots and your files

TRANSACTION TIMELINE

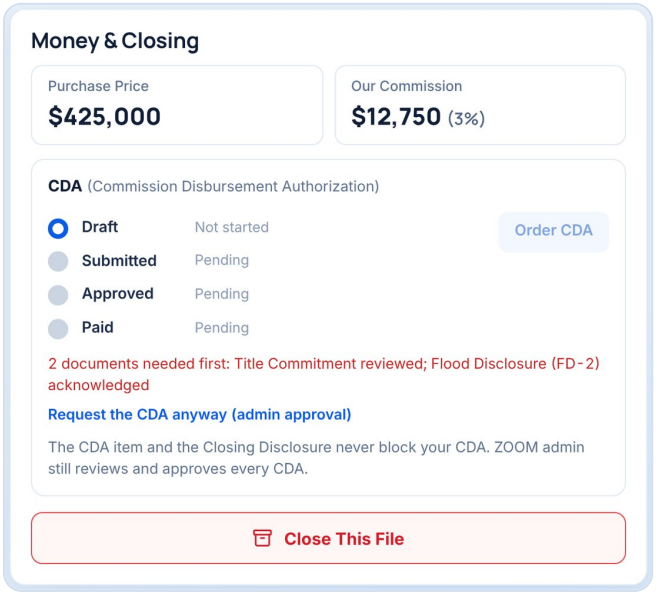
Every deadline from the contract date to possession, in order, with its status and who owns it (Agent, Buyer, Lender, Title). Under it, **Due this week**: the checklist items late or due in the next seven days. **View All** shows every date and the whole checklist (page **26**).

DOCUMENTS

Each required document is a slot: **Received** or **Needed**, with **Mark received** or **Undo**. The optional ones fold away. **All files on this deal** lists every file. The buttons at the top: **Fill a Form**, **Send for Signature** and **Add Document**.



PEOPLE ON THIS DEAL Text, Call or Email anyone on the file



MONEY & CLOSING Price, your commission and the CDA

PEOPLE ON THIS DEAL

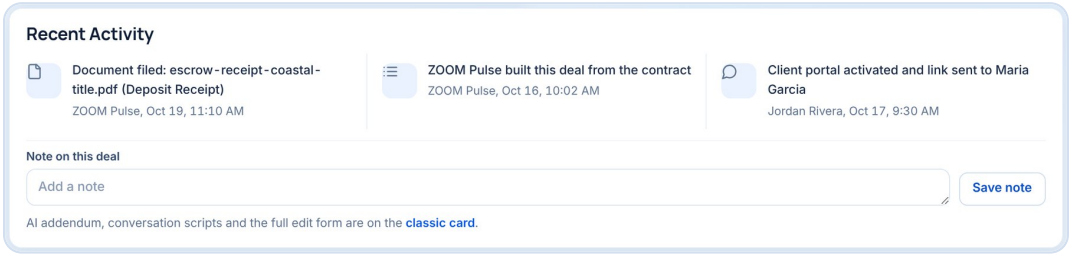
Your client, the other party, the other agent, lender, title, inspector and you. One row each with Text, Call or Email (page **28**).

MONEY & CLOSING

The purchase price and your commission in dollars. The CDA card with its four steps: Draft, Submitted, Approved, Paid (page **33**). And **Close This File** for when you close it yourself.

RECENT ACTIVITY AND YOUR NOTE

The last three things that happened on the deal, from you or from ZOOM Pulse, and **View All Activity** for the full record. Below it, one note box for the deal and **Save note**. The AI addendum, the conversation scripts and the full edit form are one tap away on the **classic card**; **Back to Transactions 3.0** brings you back.



RECENT ACTIVITY Every step on record, yours and Pulse's

Deadlines and what the colors mean

You should be able to look at My Deals for three seconds and know where the fire is. The colors do that.

Next Deadline (on My Deals)

COLOR	WHEN
Red	The next deadline is today, tomorrow or the day after, or the closing date passed and the file is still open ("Past closing date: needs closing").
Amber	The next deadline is three to seven days out. On a listing: it expires within 14 days.
Dark	The next deadline is more than a week away. You are fine.
Grey	No dates yet, or the deal is closed, expired or cancelled.

The health dot

Red	At least one checklist item is past its date.
Yellow	Something on the checklist is due in the next two days.
Green check	On track.
Grey	Closed, expired or cancelled.

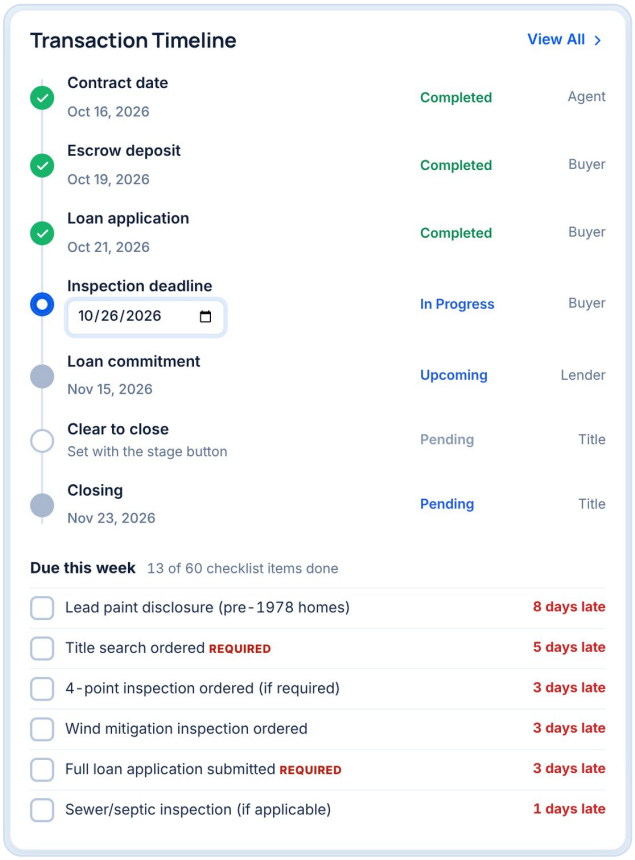
On the timeline

Each date says **Completed** (green check, the date passed), **Due today**, **In Progress** (the next one coming, blue), **Upcoming**, **Pending** or **Not set**. A date Pulse counted carries a small tag: **From the contract**, **Counted from the contract** or **ZOOM default**, plus **Unconfirmed edition** until the forms are uploaded. On the checklist, a late item says how many days late in red.

TO CHANGE A DATE

1. On the timeline, tap the date (or **Add date**).
2. Pick the new day in the calendar box.
3. It saves at once, the next deadline and the colors update, and the change goes in the deal's activity.

Clear to Close is set with the stage button, not a date box. To change the closing date with the parties' signatures, use an extension (page **55**).



CHANGE A DATE Tap it, pick the day

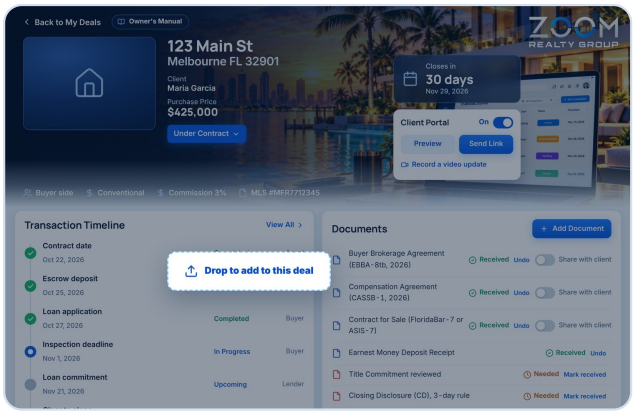
Uploading documents

Every document lands in the same place, whichever way it arrives, and ZOOM AI reads each one to name its type and fill the checklist.

Drag and drop

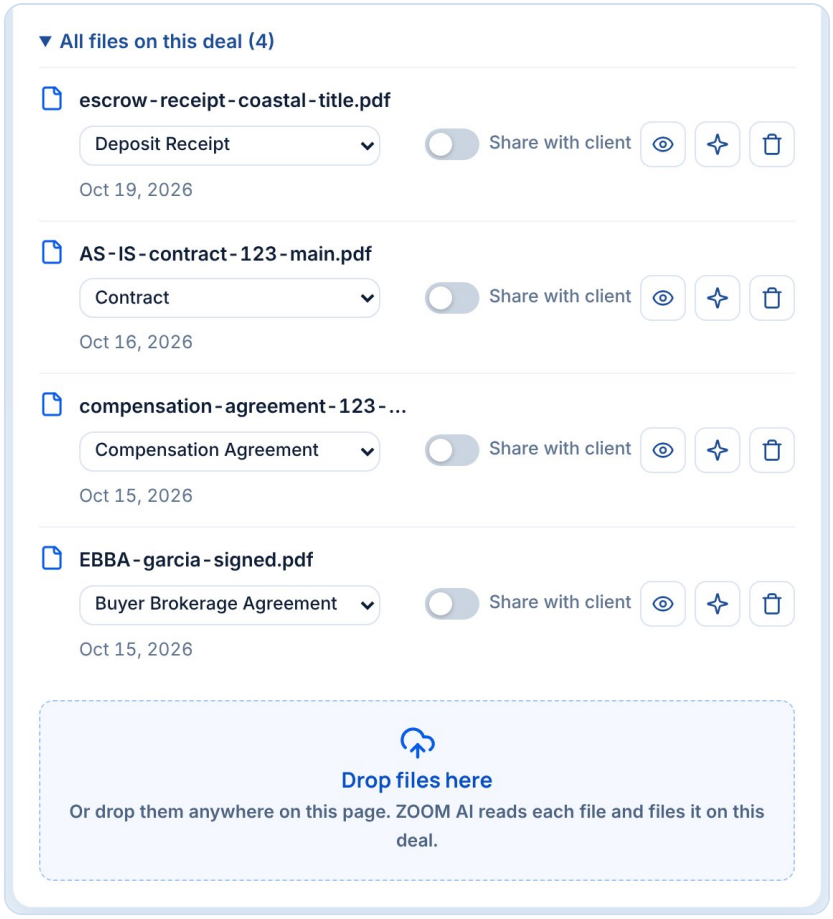
1. Open the deal.
2. Drag one file or many from your computer and drop them **anywhere on the page**. The page turns blue and says "Drop to add to this deal."
3. Or tap **Add Document**, or the **Drop files here** box, and pick the files.
4. ZOOM AI reads each file and gives it a type (Contract, Addendum, Deposit Receipt, Inspection, Closing Disclosure and so on). When it is sure, the matching checklist slot says **Received (auto)**.

PDF, Word, JPG, PNG, Excel and text files. On a phone, Add Document opens your camera roll and files.



DROP ANYWHERE The whole Deal page takes the file

Every file on the deal



ALL FILES ON THIS DEAL Type, date, Share with client, View, Read with ZOOM AI and Remove

- **Check type.** When ZOOM AI was not sure, the file says **Check type** and Pulse Needs You asks you to review it. Pick the right type in the box under the name. Your choice always wins.
- **Share with client.** The switch puts the file on your client's portal. Files are never shared until you flip it.
- **View** (the eye) opens the file in a new tab through a private link that lasts five minutes.
- **Read with ZOOM AI** (the sparkle, on PDFs) reads the document and offers what it found for the deal.
- **Remove** (the bin) takes the file off the deal.

Emailing documents to deals@zoomai.app

Most paper arrives by email. Now it can go straight into the deal without you opening a laptop. You, the title company, the lender and the other agent can all send to **deals@zoomai.app**.

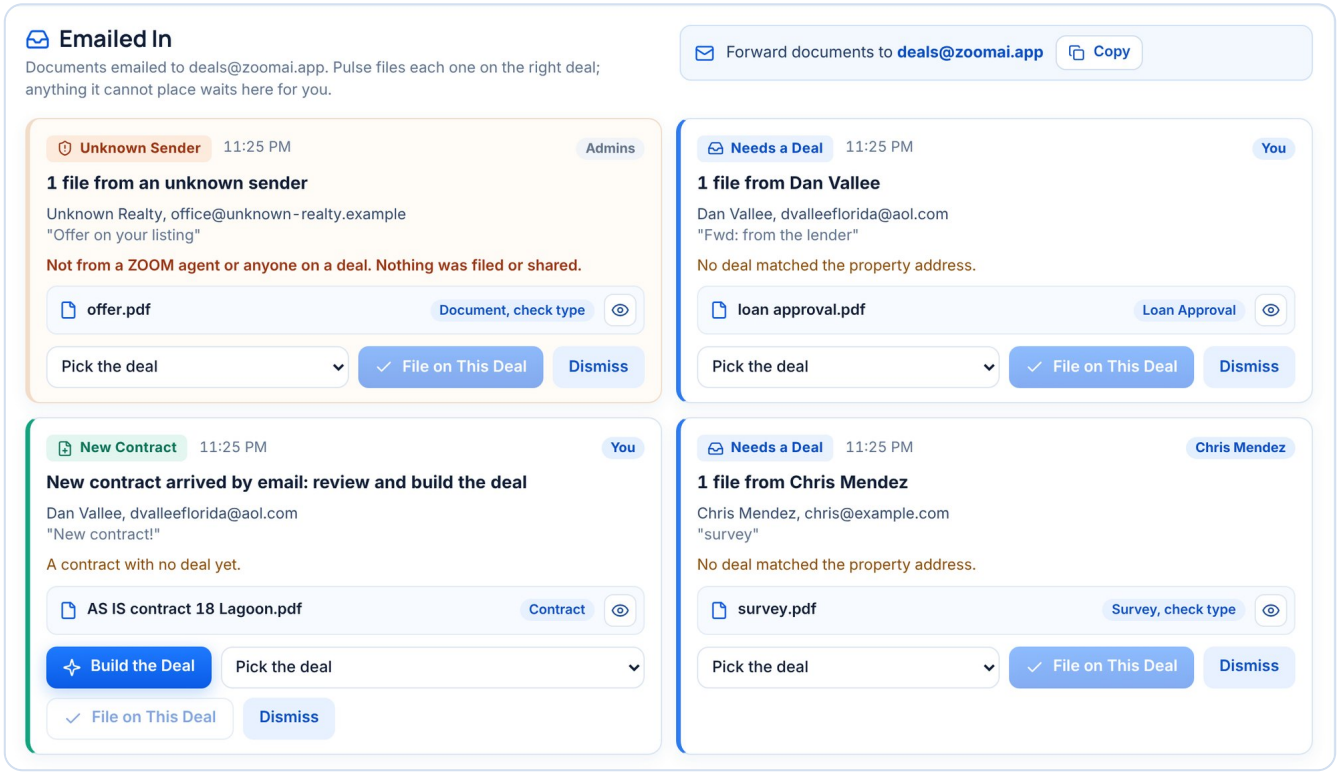
1. Forward the email with its attachments to **deals@zoomai.app**. Put the property address in the subject when you can, for example "123 Main St: inspection report".
2. Pulse reads who sent it and which deal it is for, files each attachment and names its type.

3 On the deal, **Pulse Filed Your Email** says what arrived: "3 files arrived by email from Coastal Title: Closing Disclosure filed." Tap **Got It**.

How Pulse matches a deal

WHO SENT IT	WHAT PULSE DOES
You (your ZOOM email)	Looks for the address (street number and name) in the subject, the message or the documents. Exactly one of your open deals matches: filed. None or more than one: it waits in your Emailed In box.
Someone on the deal (title, lender, your client, the other agent)	Files it on their deal when the address matches, or when they are on only one open deal and the email names no address. Otherwise it waits for you.
Anyone else	Nothing is filed or read. It goes to the office as "Unknown Sender".

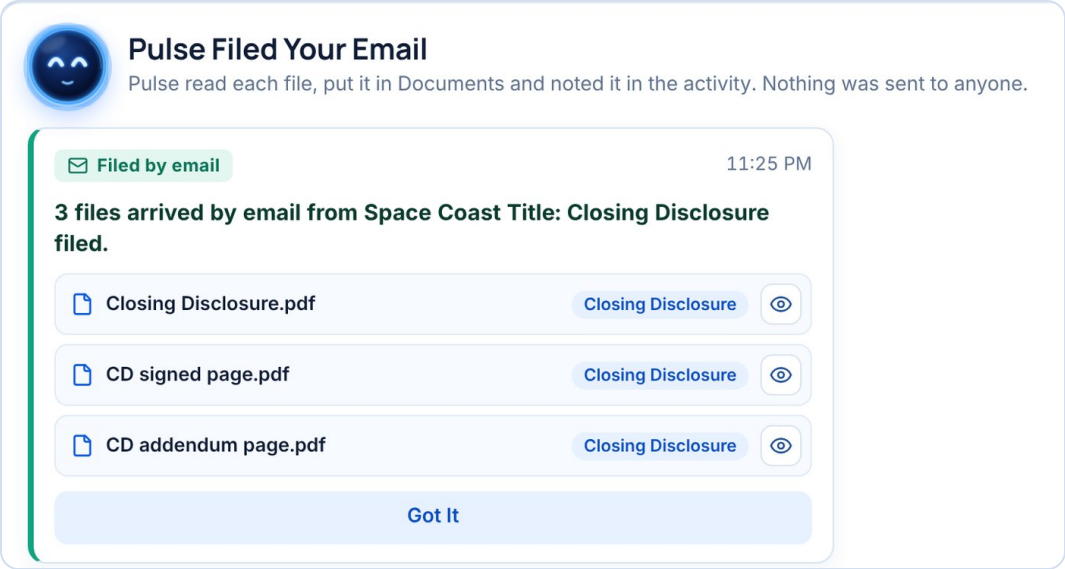
Pulse never guesses. Up to 10 files per email, 25 MB each: PDF, JPG, PNG, GIF, WebP, HEIC, DOC and DOCX. Signature logos are skipped. Nobody is texted or emailed back.



EMAILED IN Pick the deal, File on This Deal, Build the Deal from a new contract, or Dismiss

Working the Emailed In box

1. **Needs a Deal:** pick the deal in the box, then tap **File on This Deal**.
2. **New Contract:** a contract arrived with no deal. Tap **Build the Deal** and Pulse's build card opens with it.
3. Use the eye to look at a file first. **Dismiss** drops it.
4. **Copy** next to "Forward documents to deals@zoomai.app" puts the address on your clipboard.



PULSE FILED YOUR EMAIL On the deal, with each file and its type

The checklist

There are two lists on every file, and each one has a job.

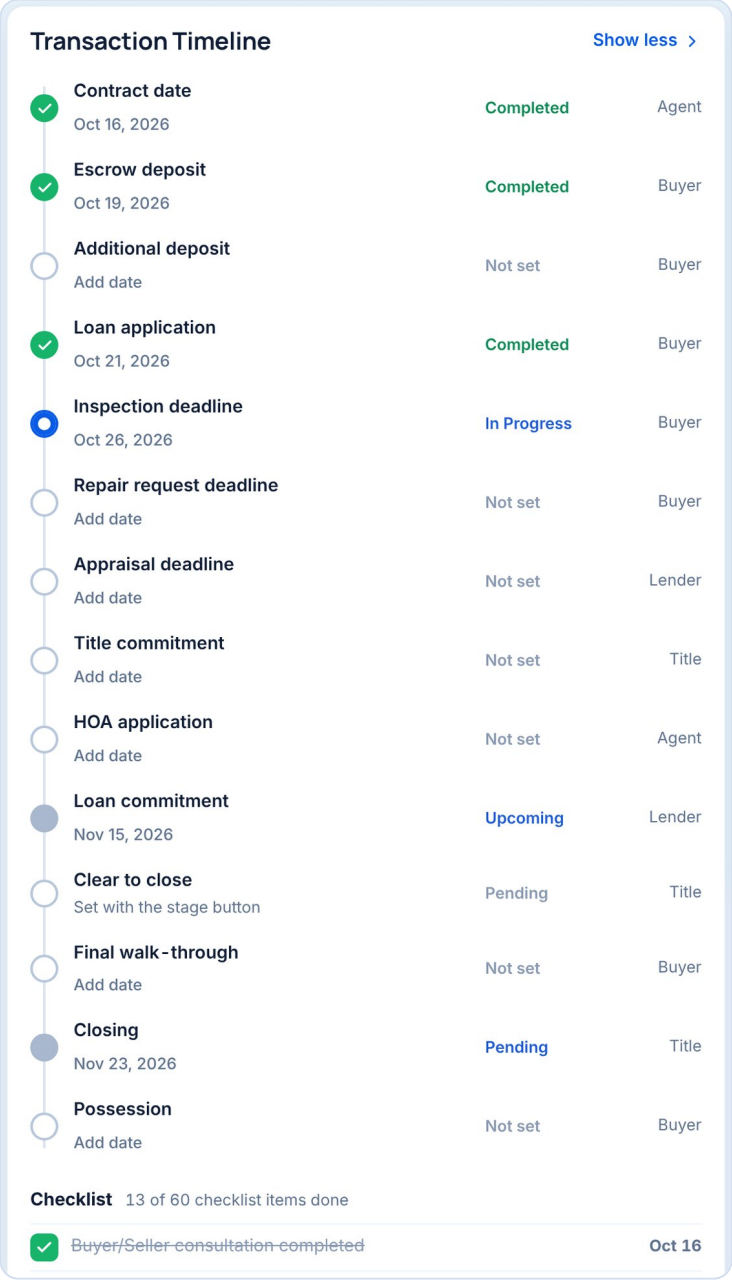
The document slots (Documents card)

The documents the brokerage needs for your side of the deal: for a buyer, the brokerage agreement, the compensation agreement, the contract, the deposit receipt, the title commitment, the Closing Disclosure, the flood disclosure and the CDA. Each slot says **Received** or **Needed**; **(auto)** means ZOOM AI ticked it from a file.

- A slot ticks itself when a file of that type arrives and ZOOM AI is sure of the type. Tap the slot name to open the file that fills it.
- **Mark received** ticks it by hand. **Undo** takes it off. Your choice always wins.
- **Optional documents** fold away (pre-approval, inspection report, appraisal, survey and more). They count when you add them.

The task checklist (Timeline card)

The steps of a Florida deal, each with a date counted from the contract. You do not have to look at all of them. **Due this week** shows only what is late or due in the next seven days; **View All** shows the full checklist with how many are done.

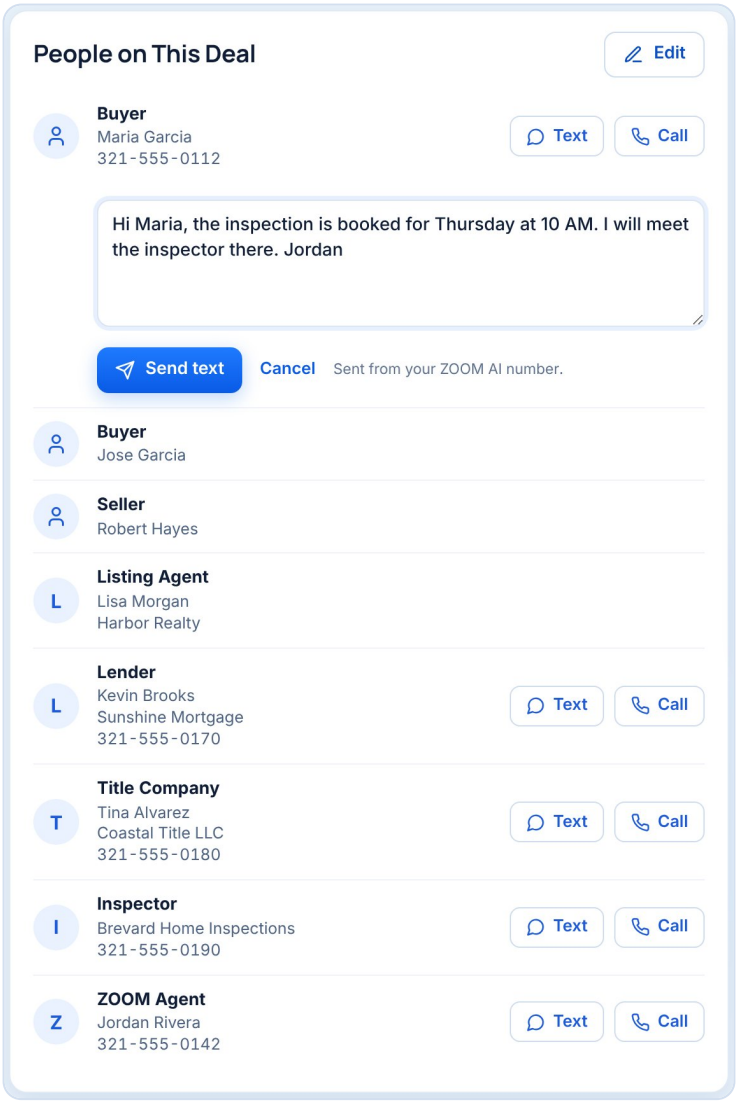


VIEW ALL Every date and the full checklist, Required marked in red

1. Tap the box next to an item to tick it. Tap again to untick.
2. **Required** items are the ones the health dot and Pulse watch most closely.
3. Or tell Pulse: "Mark the home inspection completed on 123 Main." Pulse shows a card; say yes or tap Approve (page **62**).

People on the deal

Every person on the file, one row each. Pulse fills them from the contract: your client, the other party, the other agent, the lender, the title company and you. Anyone you add later shows here too.



TEXT FROM THE DEAL Type, Send text. It goes from your ZOOM AI number and is saved on the deal

To text someone on the deal

1. Tap **Text** on their row.
2. Type your message and tap **Send text**. It goes from your ZOOM AI number, the Do Not Call list is checked, and "Text sent to Maria Garcia (Buyer)" goes in the deal's activity.

Call dials from your phone. A person with only an email gets **Email**.

To fix or add a person

1. Tap **Edit** on the People card.

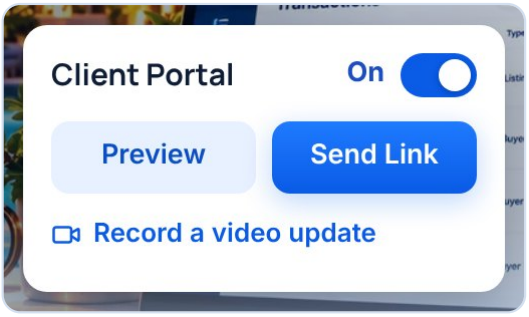
2. Change the client (name, phone, email, co-client), the lender (company, loan officer, phone, email) or title (company, closing officer, phone, email).
3. Tap **Save people**.

On a listing, Edit opens the listing form. A ZOOM co-agent sees the deal as view only.

The client portal

Your client's private page for the deal: where it stands, the dates that matter to them, the documents you share and your video updates. It answers "what happens next?" before they have to call you, and it makes you look like the most organized agent they have ever worked with.

1. On the Deal page, flip the **Client Portal** switch to **On**.
2. Tap **Preview** to see exactly what your client sees.
3. Tap **Send Link** to text your client their private link.
4. Tap **Record a video update** to put a short video from you on their page.
5. Share documents with the **Share with client** switch on each file.



CLIENT PORTAL On, Preview, Send Link, video



WHAT YOUR CLIENT SEES Under contract



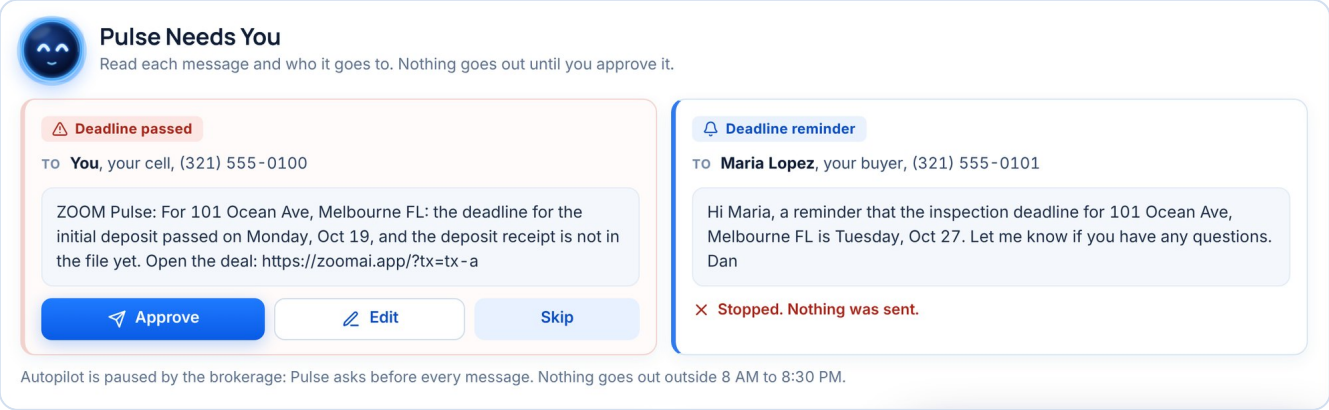
AFTER CLOSING The Welcome Home view

When the file closes, the portal flips to the Welcome Home view by itself, so the link your client saved keeps working as their homeowner page.

Pulse's approval cards

Every morning Pulse checks every deal and writes the messages a great coordinator would send. Each one becomes a card. Nothing goes out until you approve it.

CARD	WHO IT GOES TO AND WHY
Deadline reminder	Your client, before a deadline on their side: the inspection period, the deposit, the loan application.
Document request	The lender or title, when a document they owe is due: the title commitment, the appraisal, the loan commitment.
Status update	Your client, when the deal moves forward.
Deadline passed	You. A deadline passed and its proof is not in the file.
Review and referral asks	Your client, after closing (page **35**).



A CARD ON THE DEAL The kind, who it goes to with their number, the exact text, Approve, Edit, Skip

To answer a card

1. Read **To**: the name, their role and their number.
2. Read the message, word for word.
3. **Approve** sends it as written. **Edit** opens the text; change it and tap **Approve and Send**. **Skip** drops it; nothing is sent.
4. After Approve you have 10 seconds: tap **Stop** and nothing goes out. The card then says **Sent**, and the deal's activity says so.

QUIET HOURS AND SAFETY

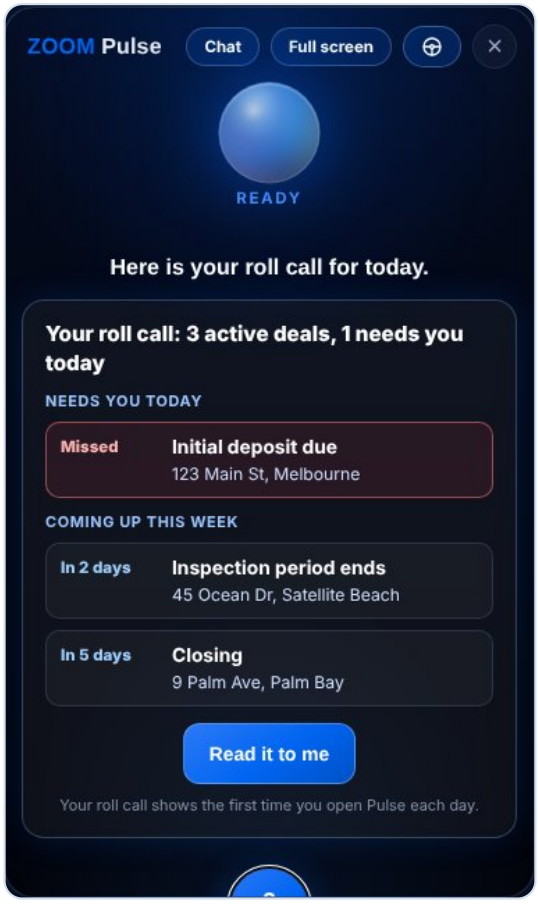
Nothing goes out before 8 AM or after 8:30 PM; a card approved at night says when it will go. Every send checks the Do Not Contact list and anyone who replied STOP at that moment. Texts go through the brokerage's one texting engine. Autopilot (Pulse sending a type of message on its own) is coming soon; until then the line under the cards says Pulse asks before every message.

The morning roll call

The roll call is your coordinator's morning stand-up in one glance.

In Pulse

The first time you say "Hey Pulse" or open Pulse each day, it greets you and gives you today's roll call: "Your roll call: 4 active deals, 2 need you today", with what was missed, what is due today and what is coming this week. On the full screen Pulse reads it out loud; in the small panel it shows the card with **Read it to me**, so a page you are working on never starts talking by itself. It shows once a day.



THE ROLL CALL IN PULSE The first open of the day

On My Deals

The top of Pulse Needs You says "Today's roll call: 4 active deals under contract, 3 need you today." The red cards are deadlines that passed with their proof missing:

- **Add the proof** opens the deal at Documents. Drop the deposit receipt, title commitment, appraisal or loan commitment and the card goes away.
- **Mark done** ticks the checklist item when the proof is a step, like the inspection sign-off.

Today's Roll Call lower down shows each deal in three columns: **What Moved** since yesterday, **Due** this week and **Late**.



TODAY'S ROLL CALL What moved, what is due and what is late, deal by deal

Compliance: what the broker reviews

Every file must be right before the money moves. The broker cannot read every page of every file, so Pulse reads them first and points at what a human should look at.

What Pulse checks

On contracts, addenda, listing and buyer brokerage agreements, compensation agreements and disclosures, Pulse looks for five things only: a **missing signature**, **missing initials**, a **blank field** that should be filled, a **date, price or address that does not match the deal**, and **possibly the wrong form**. It says how sure it is. Pulse only points; it never approves a document and never gives a legal opinion.

What the broker sees

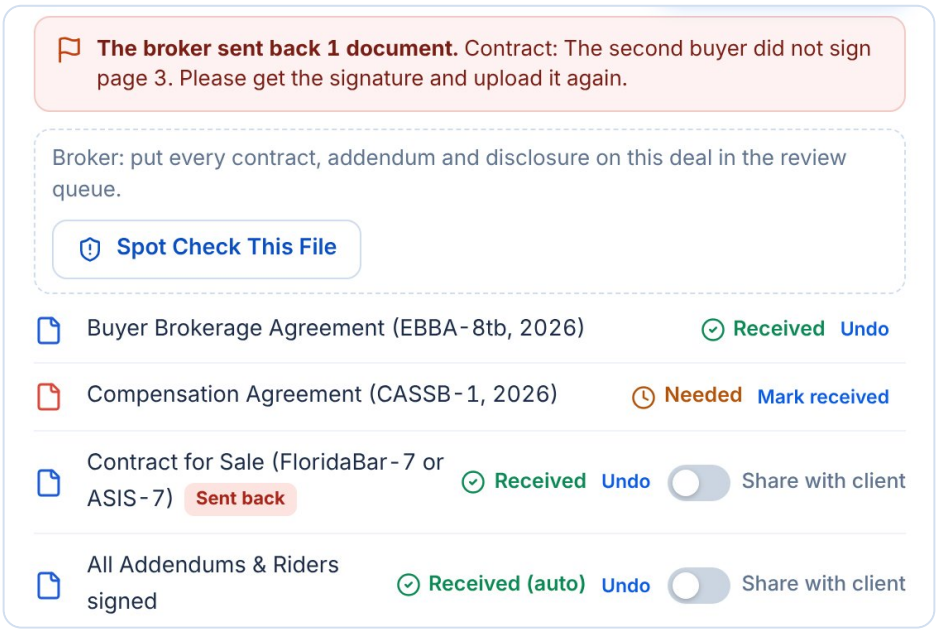
The broker's Review Queue shows only what Pulse flagged and the files the broker picked for a spot check. For each one the broker opens the document and taps Approve, or Send Back with a written reason.

What a Send Back looks like to you

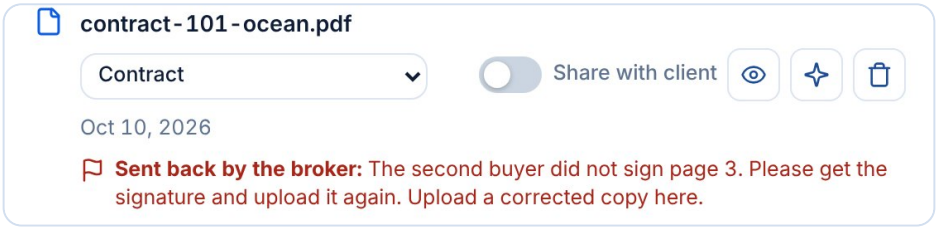
1. **A text from ZOOM Pulse**, between 8 AM and 8:30 PM:

   > *ZOOM Pulse: the broker sent back the Contract on 123 Main St. Reason: The buyer did not initial page 4. Please fix it and file the new copy on the deal: https://zoomai.app/?tx=...*

2. **On the deal**, a red banner at the top of Documents: "The broker sent back 1 document." with the reason; a **Sent back** chip on the slot; and under the file, "Sent back by the broker: *the reason*. Upload a corrected copy here."



SENT BACK The banner on Documents and the Sent back chip on the slot



ON THE FILE The broker's reason, word for word

To fix it and refile

1. Tap the link in the text. The deal opens.
2. Get the fix done (the initials, the signature, the blank).
3. Drop the corrected copy on the same deal, or email it to deals@zoomai.app. Make sure its type is the same (Contract, Addendum and so on).
4. Pulse takes the old copy off the broker's waiting list. When the broker approves, the file says **Approved by the broker**.

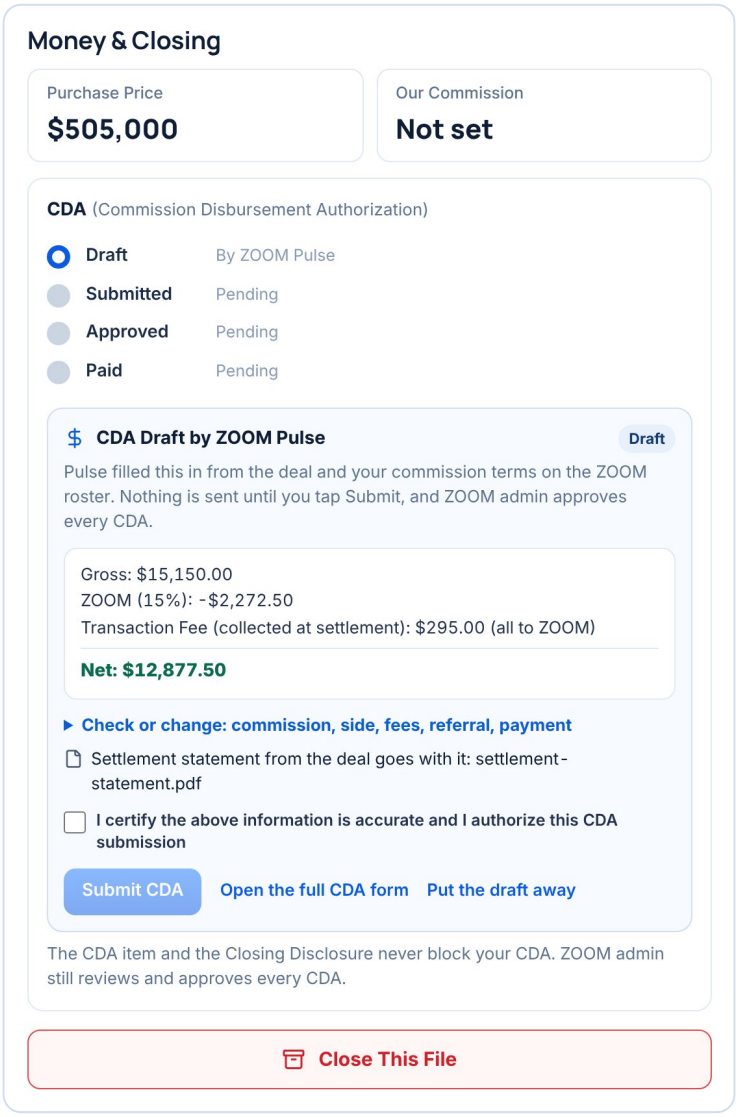
You may also see "Flagged by Pulse for the broker" or "In the broker's spot check" on a file. Those need nothing from you unless the broker sends it back.

The CDA, from Pulse's draft to the approval text

The CDA (Commission Disbursement Authorization) tells title how to pay the commission. It is the most important document in your file to you, and now it mostly writes itself.

Pulse's draft

When the deal is near closing (Clear to Close, closing in 10 days or less, or a settlement statement on file), Pulse opens a draft on the Money card: **CDA Draft by ZOOM Pulse**. The numbers come from the same CDA calculator the full form uses, with the deal and your commission terms on the ZOOM roster: the gross, ZOOM's share or your flat brokerage fee, the transaction fee and your net. Your CDA follows your money plan on the roster, which can be different from your ZOOM AI plan (for example Elite access on a flat fee per side).



CDA DRAFT BY ZOOM PULSE The numbers, Check or change, the settlement statement, the certify box and Submit CDA

PULSE NEVER GUESSES A NUMBER

If a pay term is empty on the roster (your plan, your split, your cap) or the deal is missing the price or the commission, the draft says "Pulse needs N things before it does the math" and shows each one as a blank marked **Needed**. Fill it on the draft, or ask the office to fill your roster.

To submit your CDA

1. Open the deal and read the draft on the Money card.
2. Open **Check or change** to look at the commission percent, the side, the transaction fee split, any referral fee and who it is paid to, the payment method and a co-agent split. Change what is wrong; the numbers update.
3. Check the settlement statement line. If one is on the deal, it goes with the CDA. You can submit without it.
4. Tick **I certify the above information is accurate and I authorize this CDA submission**.
5. Tap **Submit CDA**. The CDA card moves to **Submitted**.

Open the full CDA form is there when you need every field. **Put the draft away** hides the draft; the full form stays.

Documents the CDA needs first

Submit opens once the documents the CDA really needs are in: the contract, the brokerage and compensation agreements, the deposit receipt and the other required slots. The CDA item and the Closing Disclosure never block your CDA. When a document truly cannot exist yet, tap **Request the CDA anyway (admin approval)** and give the reason.

What happens next

1. Your CDA goes to the broker's CDA inbox. ZOOM admin reviews every CDA, may edit it, and approves it.
2. If it is sent back, the Money card says "Sent back:" with the reason. Fix it and tap **Fix and resend**.
3. When it is approved, you get a text:

   > *The CDA for 123 Main St is ready. Open it here: ...*

   and an email with the CDA. No dollar amounts are ever in the text.
4. The CDA card shows **Approved**, then **Paid** when the office marks it disbursed. **Open CDA** opens it.

Closing the file and the Welcome Home

A file that sits open after closing is a file that bothers the office on Monday. Pulse closes the obvious ones for you.

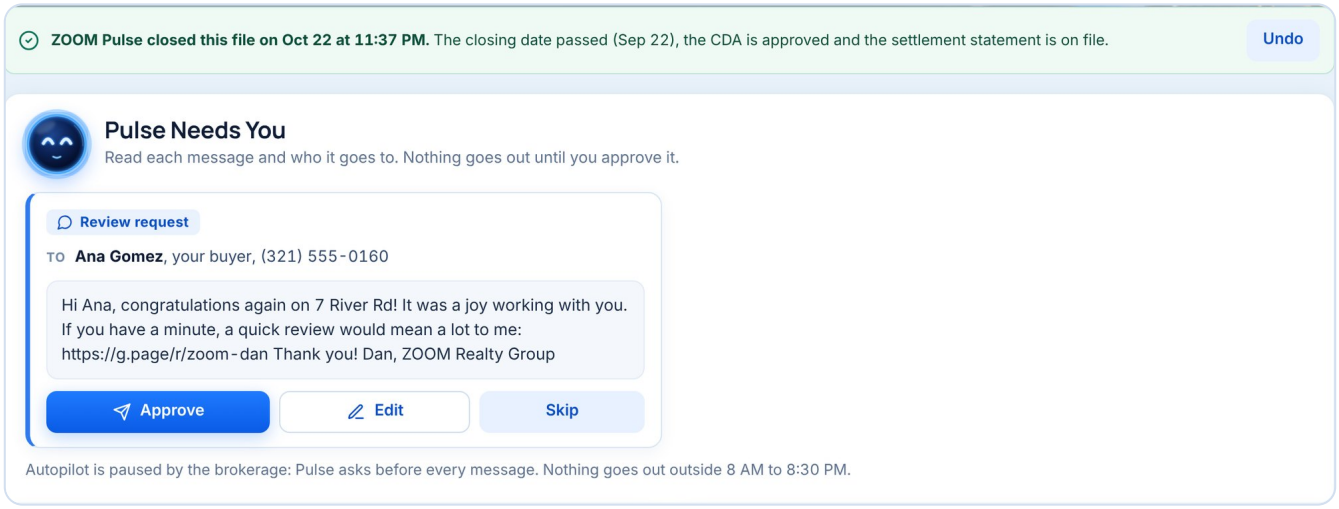
When Pulse closes a file

Once a day, between 9 AM and 6 PM, Pulse closes an open sale only when **all three** are true: the closing date has passed, the CDA is approved or paid, and a settlement statement is on file. Then it:

1. Sets the stage to Closed and writes it in the deal's activity.

2. Flips your client's portal to the **Welcome Home** view.
3. Texts you:

> *ZOOM Pulse: I closed 123 Main St in Transaction Manager because the closing date passed (Oct 30), the CDA is approved and the settlement statement is on file. Not right? Open the deal and tap Undo: ...*



CLOSED BY PULSE Who closed it, why, and Undo

Undo for 14 days

The deal shows "ZOOM Pulse closed this file" with the reasons and an **Undo** button for 14 days. Undo puts the deal back exactly as it was. A file you re-open is never closed by Pulse again.

To close a file yourself

1. Upload the final settlement statement (ALTA) in Documents.
2. Tap **Close This File** on the Money card, or pick Closed on the stage button.
3. Answer the archive question. The portal flips to Welcome Home.

The review and referral asks

After closing, Pulse lines up two cards for you to approve, never to send on their own:

- **The review ask**, 3 to 21 days after closing, only when your Google review link is saved in your settings:

> *Hi Maria, congratulations again on 123 Main St! It was a joy working with you. If you have a minute, a quick review would mean a lot to me: ... Thank you! Jordan, ZOOM Realty Group*

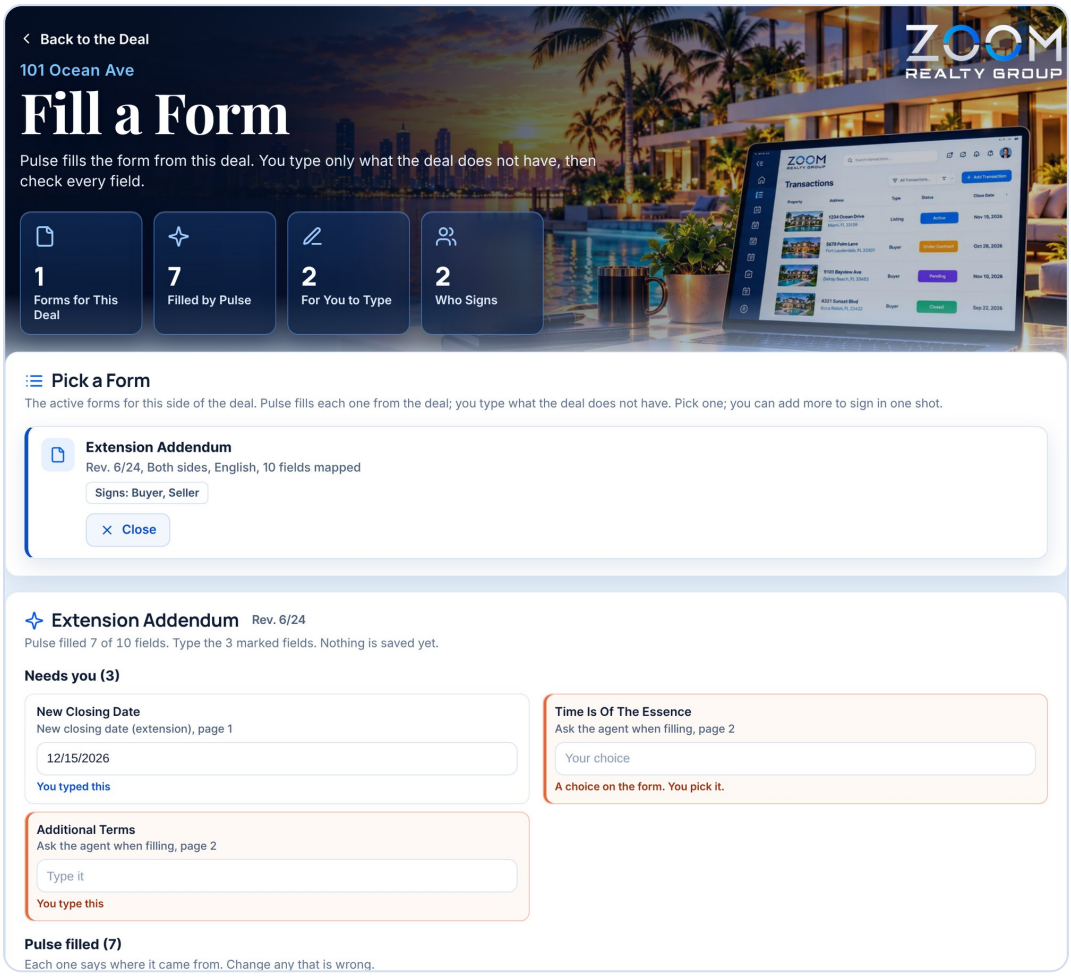
- **The referral ask**, 30 to 45 days after closing:

> *Hi Maria, it has been about a month since closing on 123 Main St. I hope you are settling in well! If a friend or family member is thinking about buying or selling, I would be honored to help them too. Jordan, ZOOM Realty Group*

Each one checks the Do Not Contact list, STOP replies, the national Do Not Call registry and quiet hours at the moment it sends, and each goes once.

Fill a Form from the deal

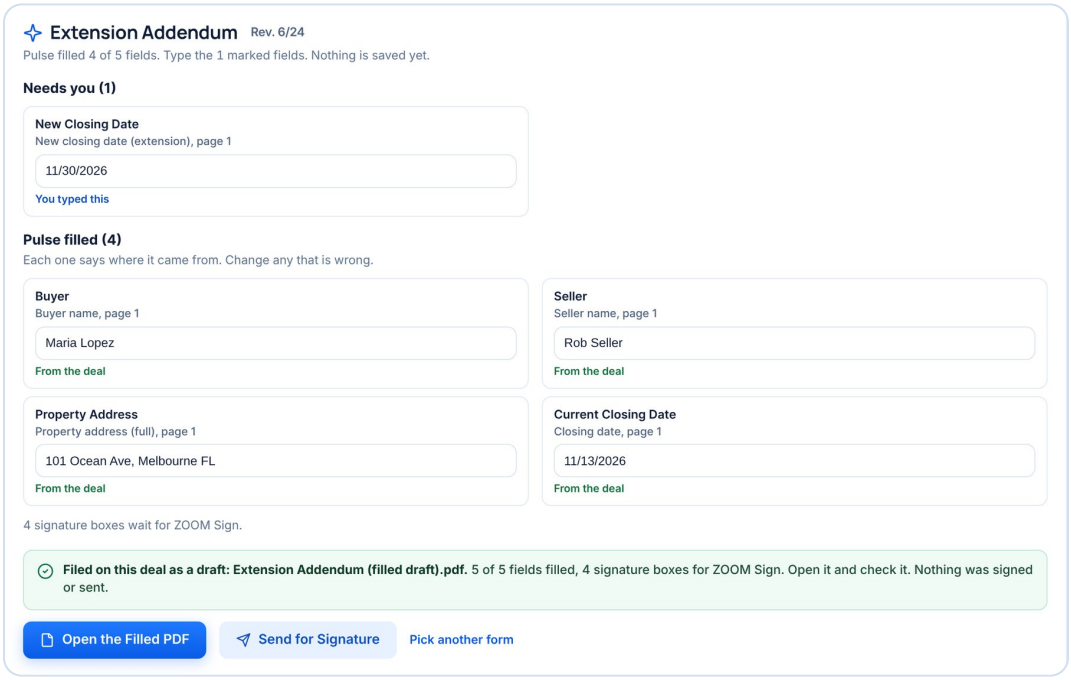
Every form you fill by hand is the deal's information typed again. Fill a Form puts the deal into the form for you: names, address, price, dates, title, your license. You type only what the deal does not have. The **Forms Library** holds the brokerage's Florida forms, about 80 of them (contracts, addenda, disclosures, leases, listing and buyer agreements), each one mapped so Pulse knows which box gets which value.



FILL A FORM Needs you first, then what Pulse filled with where each value came from

1. On the Deal page, tap **Fill a Form** at the top of the Documents card. It shows when the office has an active form for your side of the deal.
2. Under **Pick a Form**, choose the form (for example the Extension Addendum).
3. **Needs you** comes first: what the deal does not have, a choice on the form, or a new date. Type each one.
4. Read **Pulse filled**. Every value says where it came from (From the deal, From the ZOOM roster). Change any that is wrong.

5. Tap **Make the Filled PDF**. It is filed on the deal as a **draft**: not shared with your client and not ticking the checklist. Nothing is signed or sent.
6. Tap **Open the Filled PDF** and check it. Then **Send for Signature** takes it to ZOOM Sign.



FILED AS A DRAFT Open the Filled PDF, then Send for Signature

Signature, initials and signing date boxes stay empty on purpose: ZOOM Sign fills them when each person signs.

NO DEAL YET?

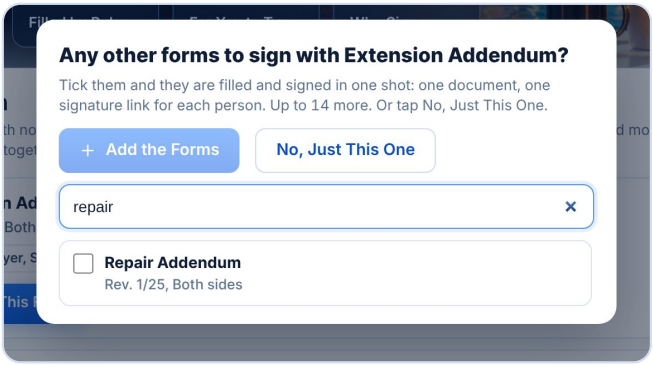
Open **ZOOM Sign** from the sidebar and tap **Fill a Form**. Type the address; ZOOM AI suggests it as you type and fills what it knows about the property. The filled form goes straight into a ZOOM Sign envelope (page **42**).

Several forms at once and saved packets

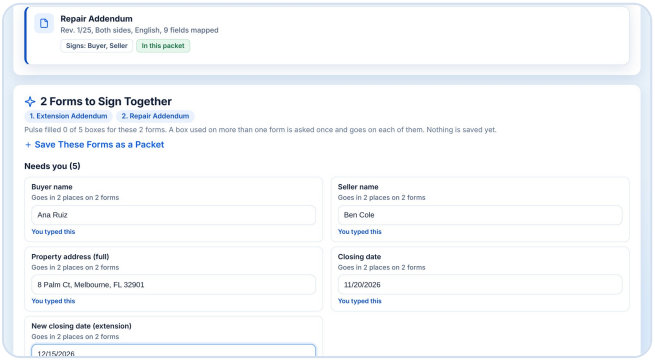
An offer is rarely one form. It is the contract, the lead paint disclosure, the HOA addendum and two more. Fill a Form does them together, and a saved packet makes it one tap.

Several forms in one shot

1. In **Fill a Form**, pick the first form.
2. Pulse asks which forms go with it. Tick them (up to 15 in all), or tap **No, Just This One**.
3. **Needs you** asks each question once, even when three forms need the same answer.
4. Tap **Make the Filled PDF**. The forms become **one document**, filed on the deal as a draft. **Send for Signature** gives each person one link: your client signs everything in one sitting.



FORMS THAT GO TOGETHER Tick them, or save them as a packet



ONE TAP NEXT TIME Every form in the packet, filled together

Saved packets

1. After you tick the forms, tap **Save These Forms as a Packet** and give it a name, like "Buyer Offer" or "Listing Paperwork".
2. Next time, your packets sit at the top of Fill a Form. Tap one and every form in it is picked and filled.
3. Only you see your own packets (up to 30). The office can also save **brokerage packets** for everyone at ZOOM; those show for every agent.
4. A packet only offers the forms that fit this side of the deal. To change or take off a packet, use the buttons on it.

ZOOM Sign: send for signature

ZOOM Sign is ZOOM AI's own electronic signature, built into the deal. No second login, no exporting, no re-uploading the signed copy: it files itself and ticks the checklist.

A ZOOM SIGN ENVELOPE

From the PDF to the signed copy, and what can happen on the way.

1 Prepare
Pick the PDF or fill a form, tick who signs, place boxes

2 Approve, Send
Nothing goes out until you tap it. A sign-by date too.

3 They sign
Private link and a code, English or Spanish, any device

4 Filed
Stamped, numbered, a certificate, and filed on the deal

ON THE WAY

Reminders
Day 1 and day 3, each with a new link

Pulse tells you
Opened, signed, declined or stalled

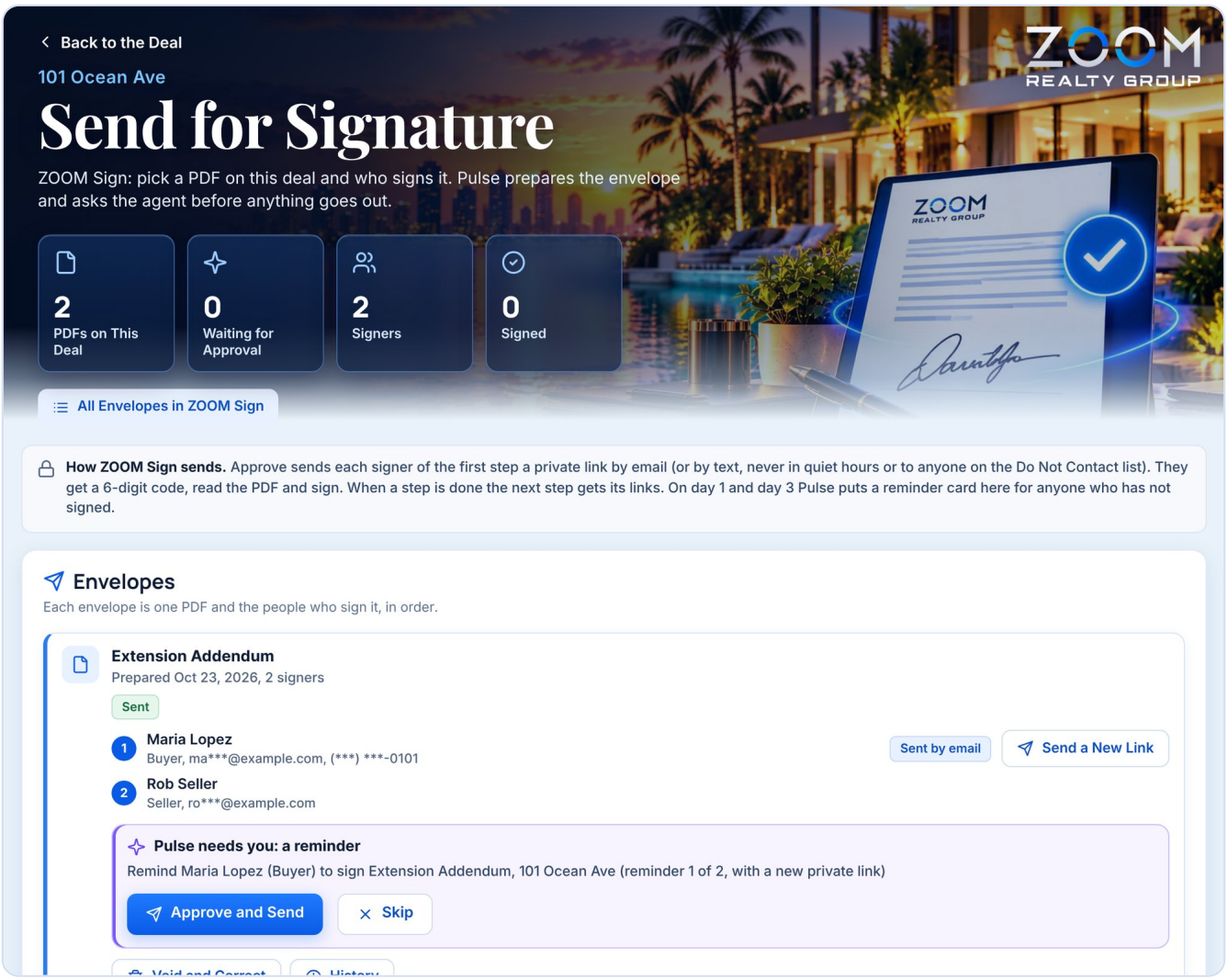
A counter
Mark the changes; Round 2 gets initials

The other side
The other agent adds clients, can counter

In person
Your client signs on your phone or tablet

Declined or expired
Links stop. Edit sends it again

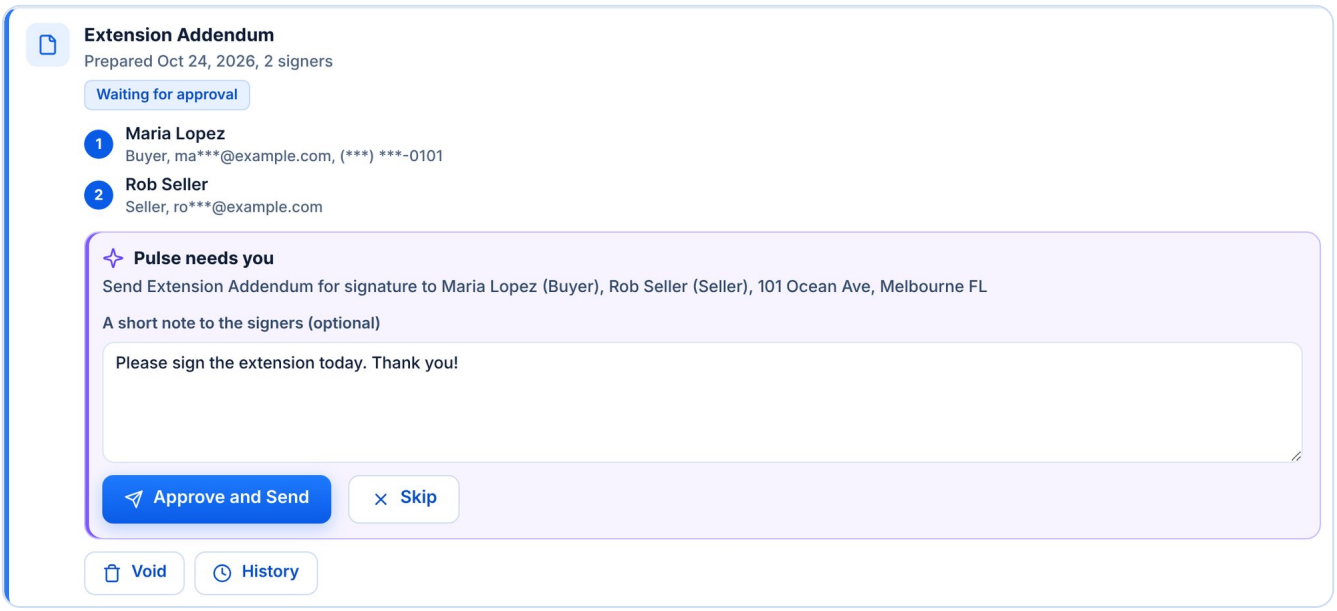
A ZOOM SIGN ENVELOPE Four steps, and what can happen on the way



SEND FOR SIGNATURE How ZOOM Sign sends, your envelopes and Prepare an Envelope

To send a document for signature

1. On the Deal page, tap **Send for Signature** on the Documents card (or from Fill a Form). Or open **Business & Operations** in the sidebar and tap **ZOOM Sign**: it opens the deal you are on, or My Deals with "Pick a deal to send for signature."
2. Under **Prepare an Envelope**, pick the PDF.
3. Under **Who Signs**, tick each person. Only people on the deal with an email or a cell can sign; add a missing one on the People card first. They sign in the order you tick them, up to six.
4. Add a short note to the signers if you like.
5. Tap **Prepare with Pulse**. Pulse prepares the envelope and puts a card on it: **Pulse needs you**.
6. Open the PDF one last time, then tap **Approve and Send** on the card.

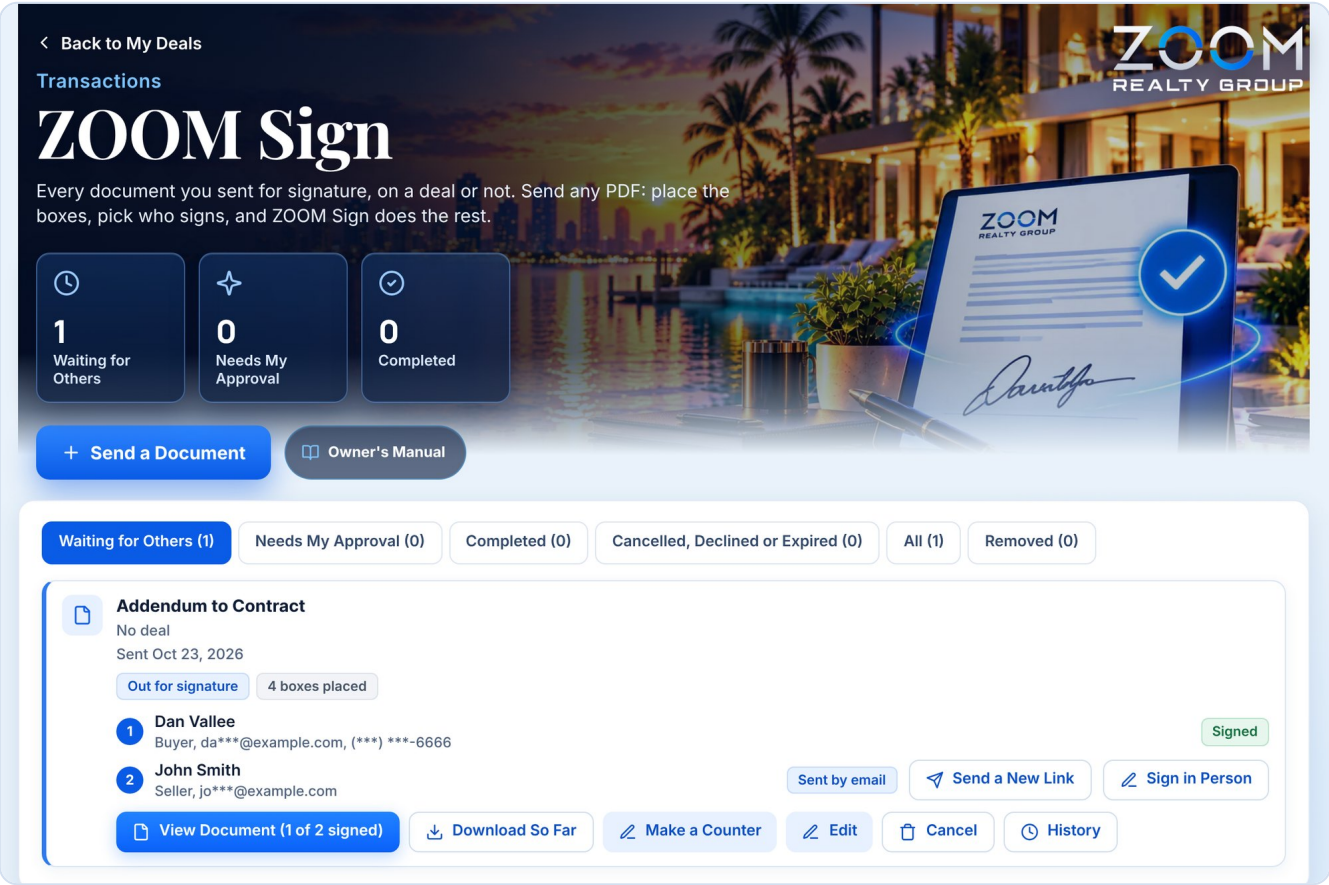


THE APPROVAL CARD Nothing goes to a signer until you tap Approve and Send

Each signer of the first step gets a private link by email, or by text when there is no email (never in quiet hours, never to anyone on the Do Not Contact list). Emails come from "*your name* via ZOOM Sign" and replies come to you. When a step is done, the next step gets its links. Each signer shows **Sent by email**, **Sent by text**, **Held for quiet hours**, **Signed** or **Declined**.

ZOOM Sign from the sidebar, with or without a deal

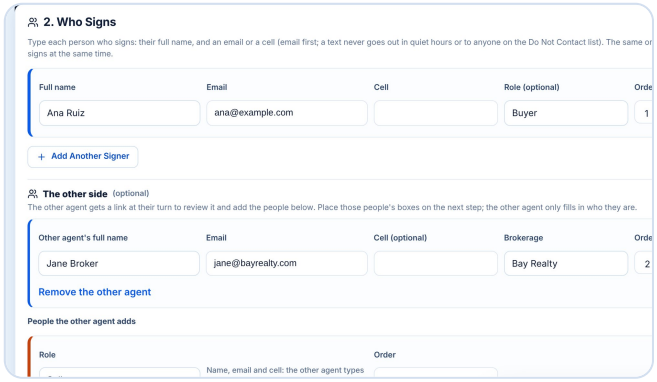
Not every document belongs to a deal: a lease renewal, a listing agreement before the listing is in ZOOM AI, a referral agreement. **ZOOM Sign** in the sidebar (Business & Operations) is the home for every document you send, on a deal or not.



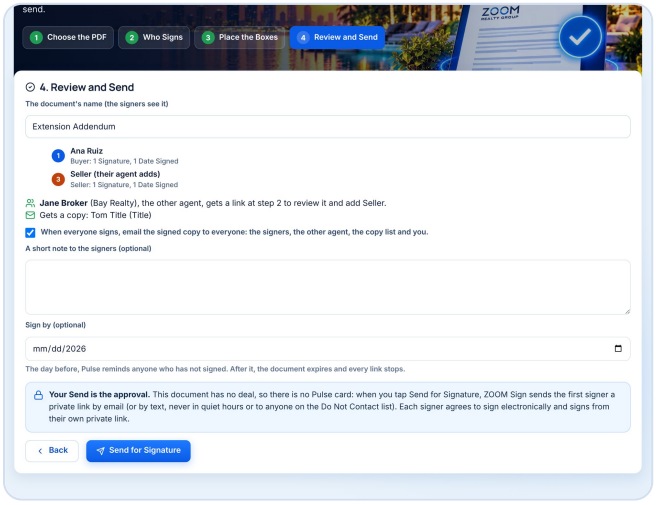
ZOOM SIGN Waiting for Others, Needs My Approval, Completed, and Voided, Declined or Expired

To send any PDF

1. Tap **Send a Document**.
2. **Choose the PDF:** upload one from your computer or phone (up to 10 MB), or pick a deal and one of its documents. **Fill a Form** starts from the Forms Library instead.
3. **Who Signs:** each person's full name, an email or a cell, and their role. The order number decides who signs first; people with the same number sign at the same time. Add the other agent here too (page **49**).
4. **Place the Boxes:** pick a person at the top, pick a box, tap the page where it goes. Drag to move it, use the corner to resize it (page **44**).
5. **Review and Send:** the document's name, who signs what, a short note and a sign-by date if you want one. Tap **Send for Signature**.



WHO SIGNS Your signers, and the other side

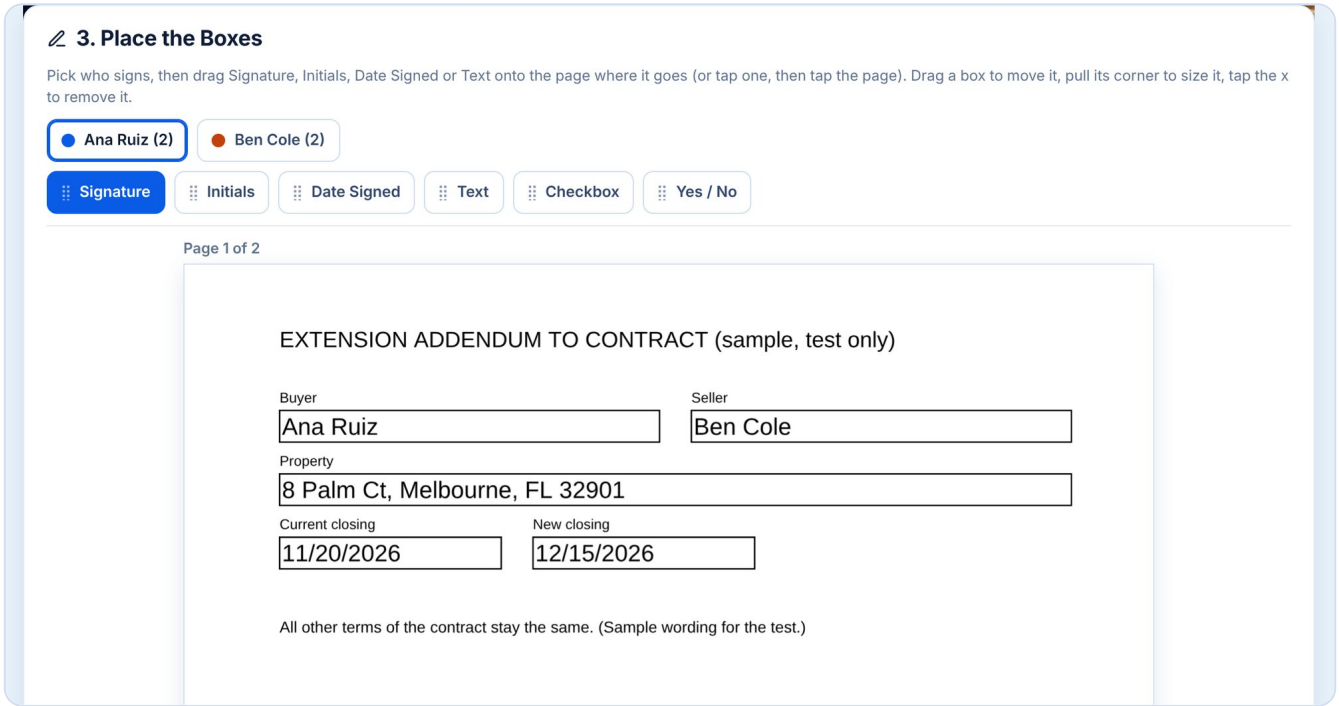


REVIEW AND SEND The last look before it goes

On a deal, the same send ends with Pulse's approval card on the deal, as on page **39**. With no deal, your tap on Send for Signature is the approval ("Your Send is the approval"). **Edit** on a sent document changes it and sends it again; **Add Someone Who Gets a Copy** sends the signed copy to a person who does not sign.

The boxes, and a sign-by date

Each box belongs to one person, and that person sees only their own boxes. Pulse places the usual ones on a form from the Forms Library; on any other PDF you place them yourself.



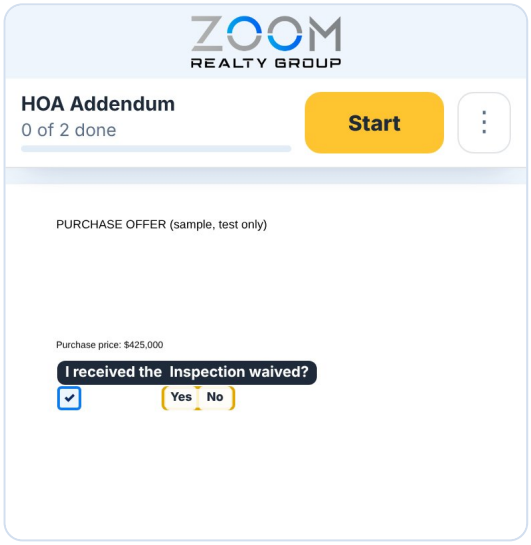
PLACE THE BOXES Pick the person, pick the box, tap the page

BOX	WHAT THE SIGNER DOES

Signature	Their typed name becomes their signature, stamped with the ZOOM Sign line.
Initials	Their initials, on every page you place them.
Date Signed	Filled by ZOOM Sign with the date they sign. Nobody types it.
Text	A short answer you ask for: a phone number, a closing agent, a choice in words.
Checkbox	A tick, for an option on the form. Its caption shows when they hover or tap.
Yes / No	A question they must answer, with its caption above the box. The document cannot be signed until it is answered.

A SIGN-BY DATE

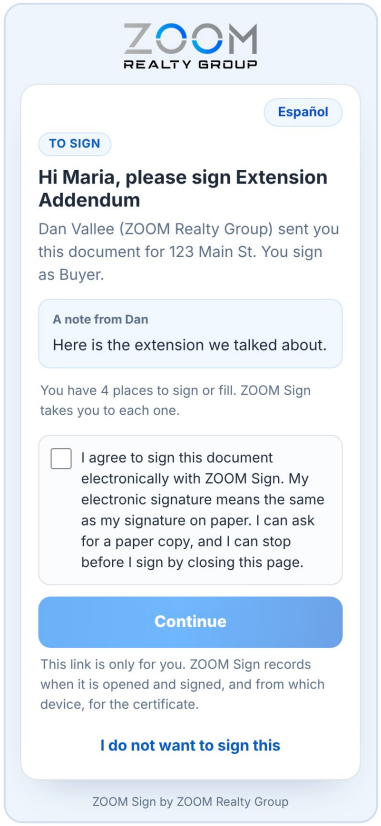
1. On **Review and Send**, pick a **Sign by** date (optional, up to 60 days out).
2. Signers see "Please sign by Friday, October 30" on their page and in the link.
3. The day before, each person who has not signed gets one reminder with a new link.
4. After the date, the document **expires**: every link stops, nobody is messaged, and you are told. **Edit** sends it again with a new date.



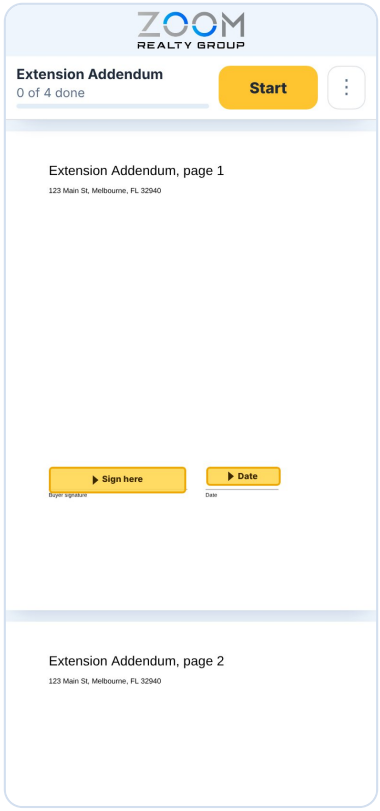
ON THE SIGNER'S PHONE A Checkbox and a Yes / No to answer

What your signers see

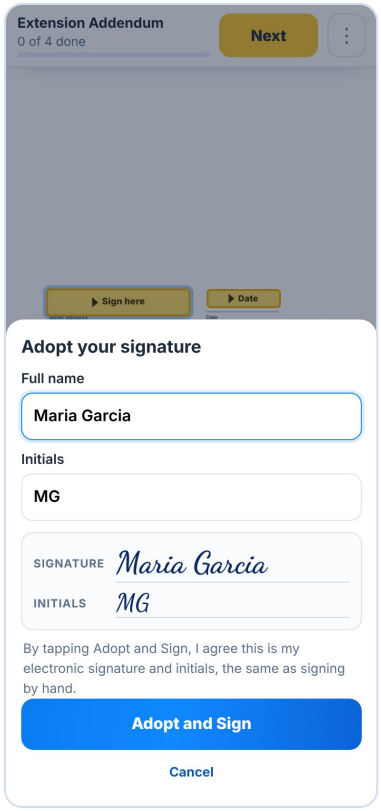
Your client opens a clean ZOOM Realty Group page with your name on it. No account, no app, no password.



1 Hi, please sign



2 The yellow tags

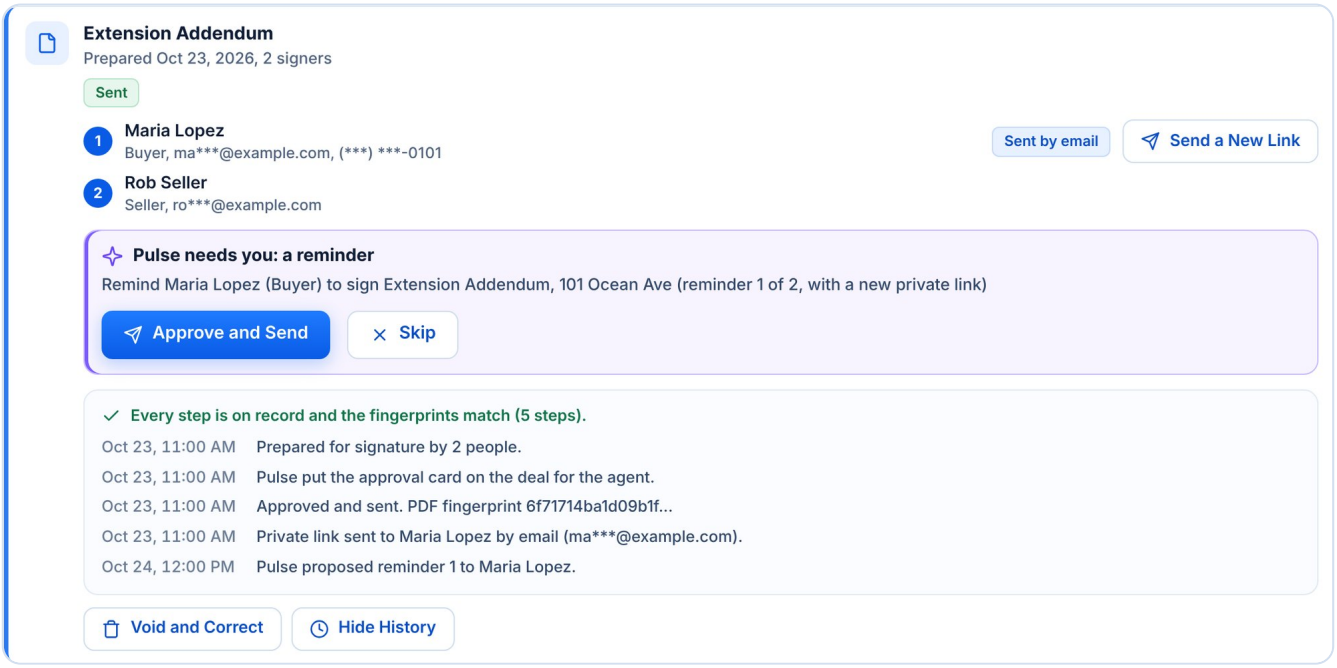


3 Adopt and Sign

1. **Welcome.** "Hi Maria, please sign *the document*." Who sent it, your note, how many places they sign. They tick the consent ("I agree to sign this document electronically with ZOOM Sign. My electronic signature means the same as my signature on paper. I can ask for a paper copy, and I can stop before I sign by closing this page.") and tap **Continue**.
2. **The document** fills the screen. Every place they sign is a yellow tag; **Start** and **Next** jump from tag to tag.
3. **Adopt your signature** once: their full name and initials in a handwriting style, **Adopt and Sign**. Every other tag fills with one tap; dates fill themselves.
4. **Finish.** When every tag is done, **Finish** signs. You see Signed at once.
5. Or **I do not want to sign this** (in the menu) with a reason. It stops and you see **Declined** with the reason.

No account and no password: the private link went only to their own email or cell, and works only for them, on their turn. ZOOM Sign keeps the date, the time, the IP address and the device for the certificate. The whole ZOOM Sign story is in the ZOOM Sign Owner's Manual.

Reminders, alerts, a new link, void and correct



FOLLOW UP A reminder card, Send a New Link, Void and Correct, and History

Reminders

On day 1 and day 3, if someone has not signed, Pulse puts a reminder card on the envelope: "Remind Maria Garcia (Buyer) to sign ... (reminder 1 of 2, with a new private link)." Tap **Approve and Send**, or **Skip**. A reminder sends a new link and the old one stops working.

Pulse tells you what is happening

You do not have to keep checking. Pulse emails you, and texts you for the ones that matter, signed ZOOM Pulse with the link to the deal:

WHEN	WHAT YOU GET
A signer opens it	An email: "Maria Garcia opened the Extension Addendum (123 Main St) to sign."
Everyone signed	An email and a text. The signed copy is already filed on the deal.
A signer declined	An email and a text with their reason, word for word. Call them, then Edit.
Not opened in 2 days	An email and a text, once per signer. Pulse's reminder card is on the deal.
Opened, not signed in 3 days	An email and a text, once per signer. A quick call usually does it.
Past the sign-by date	An email and a text: it expired and every link stopped.

Texts never go during quiet hours (they are not sent later either; the email has it). Every alert is a line in the envelope's history.

A new link

Signer lost the email, or the text never came? Tap **Send a New Link** on the signer whose turn it is. The old link stops working.

Void and correct

1. Tap **Void and Correct** on the envelope.
2. Write why you are voiding it (it goes in the history) and tap **Void the Envelope**. Every link stops working; nobody is messaged.
3. Prepare an Envelope opens with the same PDF and the same people ticked. Fix what you need (a new PDF from Fill a Form, a different signer) and tap **Prepare with Pulse** again.

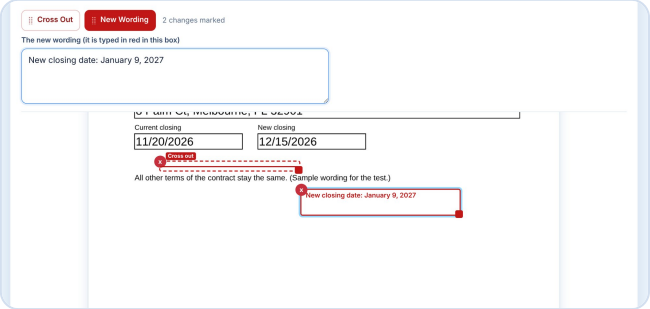
History

History shows every step in plain words with its time: prepared, the card, approved and sent, each link, each code, each view and each signature. At the top it says **Every step is on record and the fingerprints match**; if anything was changed, it says where.

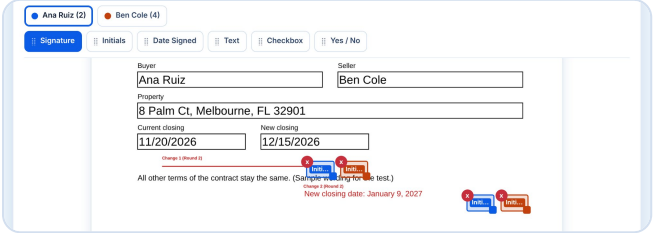
Counter offers, round by round

A counter used to mean a new form, new signatures and a file nobody could follow. In ZOOM Sign you change the terms right on the page, like you would with a pen, and every round is kept.

1. In ZOOM Sign, tap **Make a Counter** on the document, then **Mark the Changes**. The page opens as it stands now, with every signature so far.
2. Drag **Cross Out** over a term that changes, and **New Wording** where the new term goes, then type it. Up to 40 changes.
3. Tap **Save the Changes**. ZOOM Sign draws each change in red on the page, labels it "Change 1 (Round 2)" and puts an **Initials** box for every signer right beside it. Move them if you like.
4. Send it like any other document (on a deal, Pulse's card asks you first). People who already signed only initial the changes; people who had not signed still sign.



MARK THE CHANGES Cross out, then the new wording



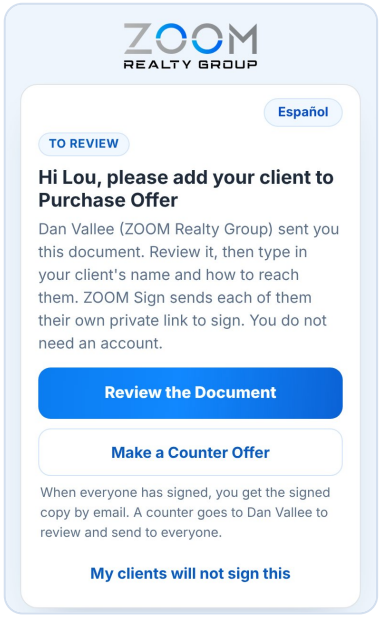
ROUND 2 Each change in red with its initials boxes

The round before stops ("Countered: Round 2") and stays exactly as it was. Every round has its own signed copy, and the last certificate names the round, lists every change and carries the signatures of the rounds before. Only agents mark changes; clients initial and sign.

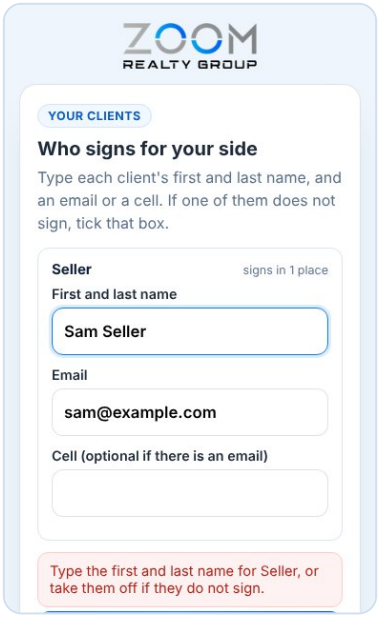
The other side: the other agent and their clients

On most deals the other agent is not at ZOOM. You can still send one document for both sides, like DotLoop, and nobody needs an account.

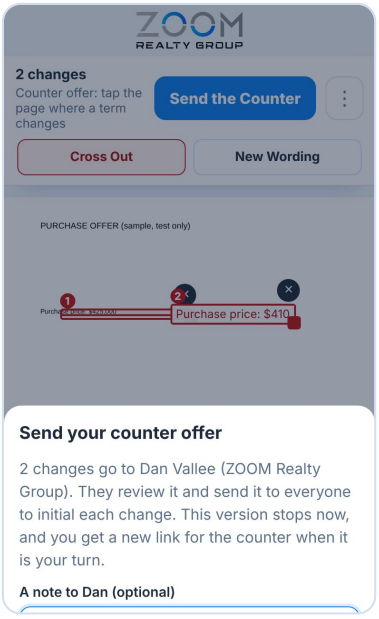
1. Under **Who Signs**, tap **Add the Other Agent** (name, email or cell, brokerage), then **Add a Person They Add** for each of their clients (the buyer, the seller). You place those clients' boxes now; you do not need their names or emails.
2. When it is their turn, the other agent gets a private link. They read the document, add their clients' names and emails, and send it on. Their clients sign with their own links.
3. The other agent can also **Counter** from their link: they mark the changes on the page and it comes back to you as a draft. You review it and send it; nothing goes to anyone from their tap.
4. When everyone has signed, the other agent gets the signed copy like everyone else.



THE OTHER AGENT Their link



THEIR CLIENTS They add the names



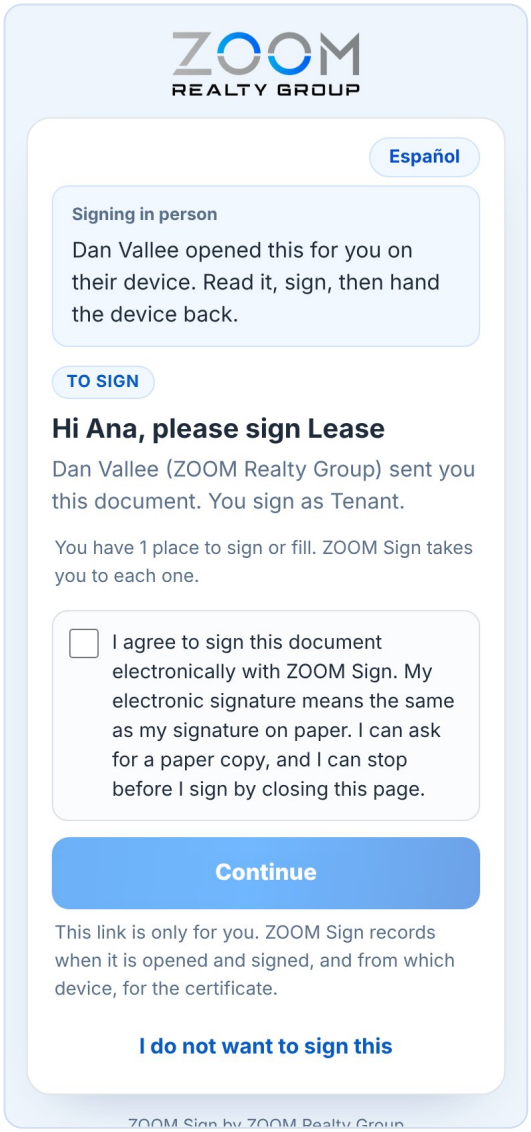
THEIR COUNTER Marked on the page

Signing in person

Your client is at the kitchen table with you. No email, no code, no waiting.

1. On the document, tap **Sign in Person** on your client's row.
2. Hand them your phone or tablet. ZOOM Sign opens the signing page for them, on your device, while you are signed in to ZOOM AI.
3. They read, tick the consent, sign and hand it back.

The link sent to them before stops working. The in-person page lasts 2 hours, and the certificate says the signature was given in person, on your device. It is for your clients only: the other agent always uses their own link.



IN PERSON Your device, their signature

En español: the Spanish signing page

Half of Florida reads Spanish first. The signing page opens in Spanish by itself when your client's phone or computer is set to Spanish, and anyone can switch at the top of the page (or in the menu while signing): **English** or **Español**.



BIENVENIDO The link opens in Spanish



FIRMAR Signing in Spanish



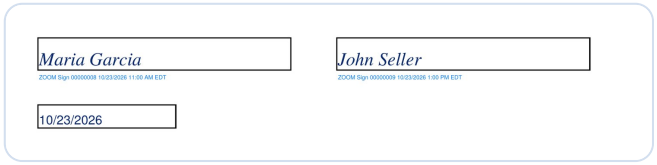
LISTO Done

The document itself does not change language. The legal consent stays in the attorney's approved English wording, with a Spanish line that says so.

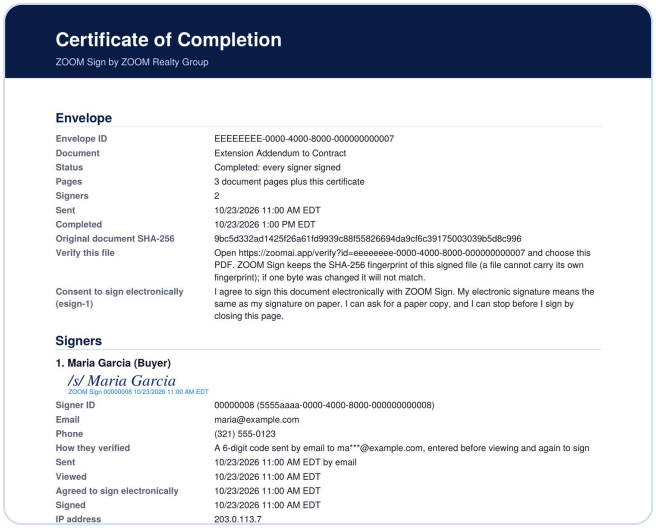
The signed copy, the stamps and the certificate

When the last person signs, ZOOM Sign finishes the document the way the big signature companies do:

1. **It checks the file.** The PDF must be exactly the one that was sent (its fingerprint, SHA-256, was kept) and the history must check out.
2. **It stamps the signatures.** Each signer's signature, initials and date go in their boxes, each with a small blue line: "ZOOM Sign", the signer's ID and the date and time. The form fields are flattened so nobody can change a value.
3. **It numbers every page.** Every page gets the footer **ZOOM Sign Envelope ID: *the* ID Page X of Y**.
4. **It adds the Certificate of Completion** at the end.
5. **It files the signed copy on the deal** with the document's type, so the checklist slot ticks itself, and the envelope says **Signed and filed**.



STAMPED The signature, the ZOOM Sign line with the signer ID and time



Certificate of Completion

ZOOM Sign by ZOOM Realty Group

Envelope

Envelope ID	EEEEEEEE-0000-4000-8000-000000000007
Document	Extension Addendum to Contract
Status	Completed: every signer signed
Pages	3 document pages plus this certificate
Signers	2
Sent	10/23/2026 11:00 AM EDT
Completed	10/23/2026 1:00 PM EDT
Original document SHA-256	9bc5d332ad1425f26a61fd9939c88f55826694da9cf6c39175003039b5d8c996
Verify this file	Open https://zoomai.app/verify?id=eeeeeeee-0000-4000-8000-000000000007 and choose this PDF. ZOOM Sign keeps the SHA-256 fingerprint of this signed file (a file cannot carry its own fingerprint); if one byte was changed it will not match.
Consent to sign electronically (esign-1)	I agree to sign this document electronically with ZOOM Sign. My electronic signature means the same as my signature on paper. I can ask for a paper copy, and I can stop before I sign by closing this page.

Signers

1. Maria Garcia (Buyer)

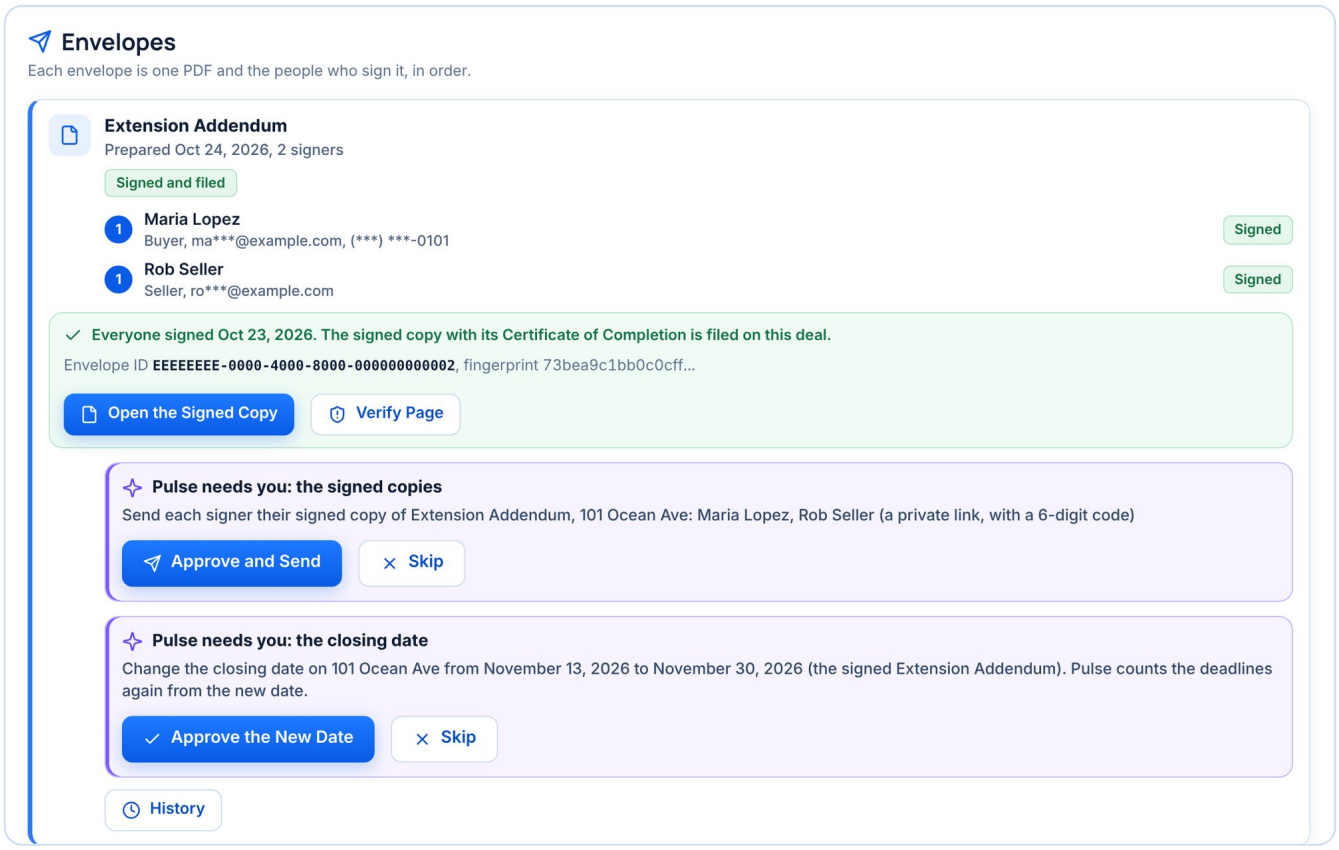
/s/ Maria Garcia
ZOOM Sign 00000008 10/23/2026 11:00 AM EDT

Signer ID	00000008 (5555aaaa-0000-4000-8000-000000000008)
Email	maria@example.com
Phone	(321) 555-0123
How they verified	A 6-digit code sent by email to ma***@example.com, entered before viewing and again to sign
Sent	10/23/2026 11:00 AM EDT by email
Viewed	10/23/2026 11:00 AM EDT
Agreed to sign electronically	10/23/2026 11:00 AM EDT
Signed	10/23/2026 11:00 AM EDT
IP address	203.0.113.7

CERTIFICATE OF COMPLETION The last page of every signed copy

EVERY PAGE The Envelope ID and the page number in the footer

The **Certificate of Completion** lists the envelope ID, the document, the status, the pages, when it was sent and completed, the original document's fingerprint, the consent wording, and for every signer: their signature, signer ID, email and phone, how they verified, when they were sent the link, viewed and signed, their IP address and device. Then the full history.



SIGNED AND FILED Open the Signed Copy, Verify Page, and Pulse's cards for the copies and the closing date

After completion

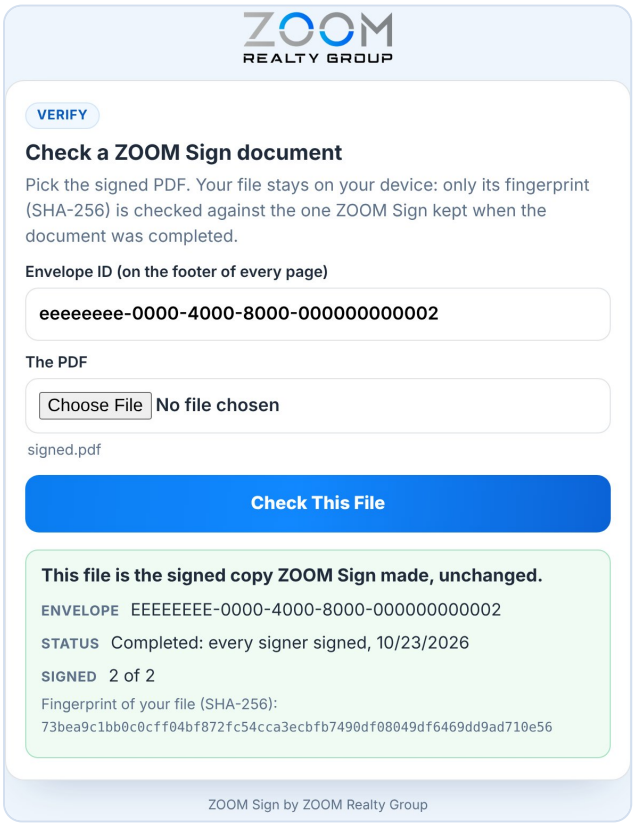
- **Open the Signed Copy** opens the final PDF. **Verify Page** opens the public check for this envelope.
- **Pulse needs you: the signed copies.** Approve and Send gives each signer a private link to their copy (with a 6-digit code). They tap **Download My Signed Copy**.
- When the signed form carried a new closing date (an extension), **Pulse needs you: the closing date** follows (page **55**).

Verifying a document at zoomai.app/verify

Anyone can check that a ZOOM Sign document is the real, unchanged signed copy: the title company, the lender, the other agent, your client.

1. Go to **zoomai.app/verify**.
2. Type the **Envelope ID** from the footer of any page.
3. Pick the signed PDF and tap **Check This File**.
4. Green: "This file is the signed copy ZOOM Sign made, unchanged", with the status, when it was completed and how many signed. If one byte was changed, it says the file does not match.

The file never leaves the device: only its fingerprint is checked. The page never shows a name, an address or a contact.



VERIFY The Envelope ID and the file, checked

Extending the closing by voice, end to end

The appraisal is late and closing has to move. This used to be an hour: the form, the names, the dates, the signatures, the new deadlines. Now it is one sentence and three taps.

1. **Say it.** "Hey Pulse, extend the closing on 123 Main to November 5." ("Give me an extension for closing on the Garcia deal, make it October 30th" works too.)
2. **Pulse checks and asks once.** It finds your open deal, the current closing date, the buyer and the seller, the Extension Addendum and who signs: "123 Main St, the Maria Garcia deal, closing October 30, 2026. Extend it to November 5, 2026? I will fill the Extension Addendum and prepare it for Maria Garcia and Robert Hayes to sign. Nothing is sent yet. Tap Approve, or say yes." If something is missing (an email for a signer, say), Pulse asks one question.
3. **Approve.** Pulse fills the Extension Addendum from the deal with the new date and files it as a draft, then prepares the ZOOM Sign envelope: "Done. The filled Extension Addendum is on the 123 Main St deal as a draft, and the ZOOM Sign card is waiting there. Open the PDF, then tap Approve and Send. Nothing was sent."

4. **Open the PDF and send.** On the deal, open the draft, then tap **Approve and Send** on the ZOOM Sign card.
5. **They sign.** ZOOM Sign stamps it, adds the certificate and files the signed copy.
6. **Approve the new date.** The card "Pulse needs you: the closing date" says "Change the closing date on 123 Main from October 30, 2026 to November 5, 2026 (the signed Extension Addendum). Pulse counts the deadlines again from the new date." Tap **Approve the New Date**.
7. **Done.** The closing date changes, one line goes in the deal's activity, every deadline is counted again, and Pulse says: "The extension for 123 Main St is fully signed and filed. Closing is now November 5, 2026."

> **THREE TAPS, ZERO TYPING**
>
> Approve the card, Approve and Send the envelope, Approve the New Date. Every step that changes something or sends something waits for you, and nothing changes on the deal until everyone has signed.

The Monday close-out text and stale deals

Every Monday morning at 9, ZOOM checks every open deal that looks closed: the closing date passed, the CDA is approved or paid, a settlement statement is uploaded, or the Closing Disclosure is on file. If you have any, you get one text with all of them:

> *Hi Jordan, this is ZOOM Realty Group. This deal still shows open in ZOOM AI Transaction Manager but looks closed:*
> *1. 15 Pine St, Palm Bay FL 32907 (Lee Park), closed Oct 21: https://zoomai.app/?tx=...*
> *Please close it: tap the link, change the status to Closed, and upload the final closing statement (ALTA) in the Compliance tab if it is missing.*

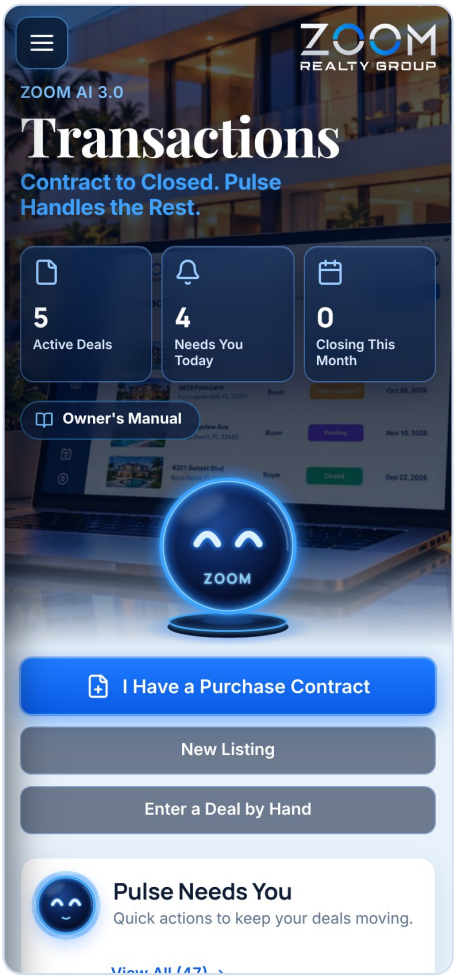
To close a stale deal

1. Tap the link. The Deal page opens.
2. If the settlement statement (ALTA) is missing, drop it on Documents.
3. Tap **Close This File**, or pick Closed on the stage button. Answer the archive question.
4. A deal that fell apart: pick Cancelled. A listing that ended: Expired.

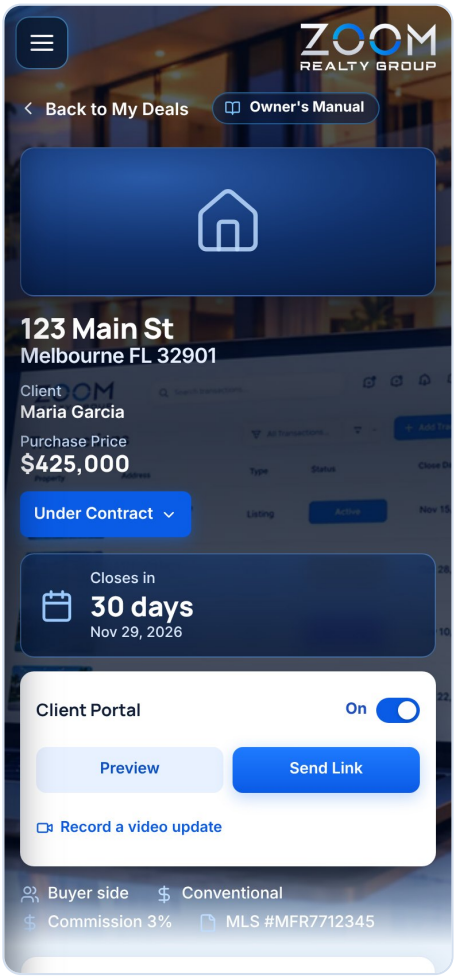
On My Deals, a file past its closing date says **Past closing date: needs closing** in red, and Pulse Needs You offers **Close file**. Pulse closes the obvious ones itself (page **35**), so the Monday list stays short.

Your deals on your phone

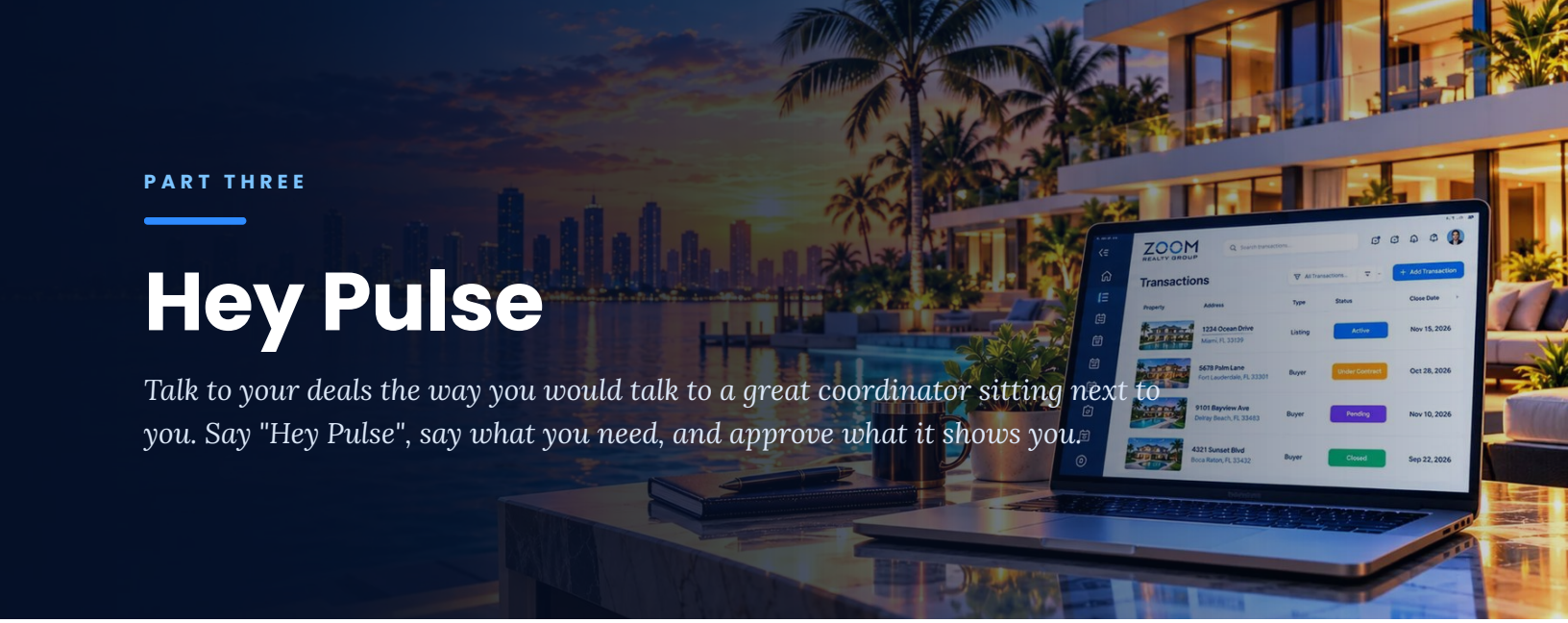
Everything in this manual works on your phone in ZOOM AI. The hero, Pulse Needs You and your deals stack in one column; the Deal page stacks Timeline, Documents, People and Money in the same order. Add Document opens your camera, so a signed page can be on the deal before you leave the kitchen table.



PHONE My Deals



PHONE The Deal page



PART THREE

Hey Pulse

Talk to your deals the way you would talk to a great coordinator sitting next to you. Say "Hey Pulse", say what you need, and approve what it shows you.

Hey Pulse: hands-free

Pulse is the man's voice in ZOOM AI. (Haley is the woman's voice who talks to your leads and clients; Pulse talks to you.) With hands-free on, you do not touch a button: say "Hey Pulse" on any page while ZOOM AI is open, and Pulse wakes up.

TALKING TO PULSE

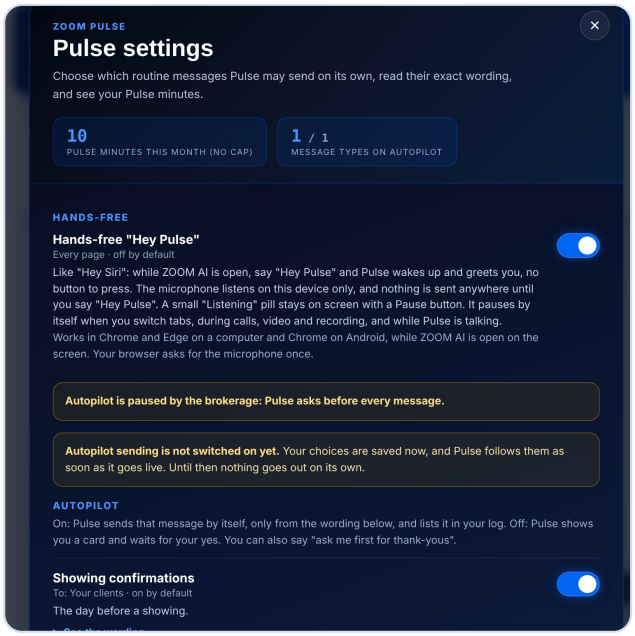
One sentence in, one card back. Nothing moves until you say so.

SAY	ASK	SEE	APPROVE	DONE
"Hey Pulse" It wakes and greets you	**"Extend the** closing on 123 Main to Nov 5"	**A card with** exactly what will happen	**Say "yes" or** tap Approve	**10 seconds to** undo, then on the activity

TALKING TO PULSE The same five beats for everything you ask

TO TURN IT ON, ONCE

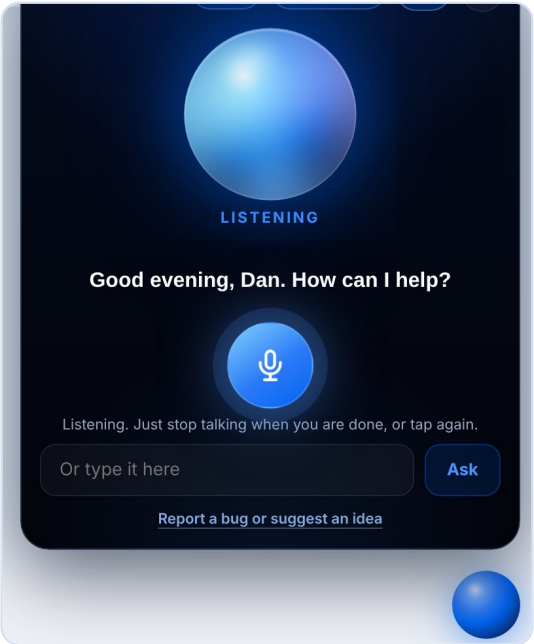
1. Open Pulse and tap the settings (the gear).
2. Turn on **Hands-free Hey Pulse**.
3. Allow the microphone when your browser asks. The first time takes a minute (a one-time download).
4. The small pill says **Listening for "Hey Pulse"**. That is all.



PULSE SETTINGS Hands-free Hey Pulse

How it behaves

- **"Hey Pulse"** and Pulse greets you by the time of day: "Good morning, Jordan. How can I help?" It listens for about six seconds. Say nothing and it goes back to sleep without a word.
- **In one breath** works too: "Hey Pulse, what is due on 123 Main?" No greeting, straight to the answer.
- **Again within ten minutes** and it just says "Yes, Jordan?"
- **It listens only for its name.** The wake word runs on your own device; nothing you say is sent anywhere until you say "Hey Pulse".
- **It steps aside** by itself during a dialer call, while a video plays, while another feature uses the microphone or camera, while Pulse is talking, and when the tab is hidden. Tap **Pause** on the pill any time.



"HEY PULSE" Pulse wakes and greets you by name

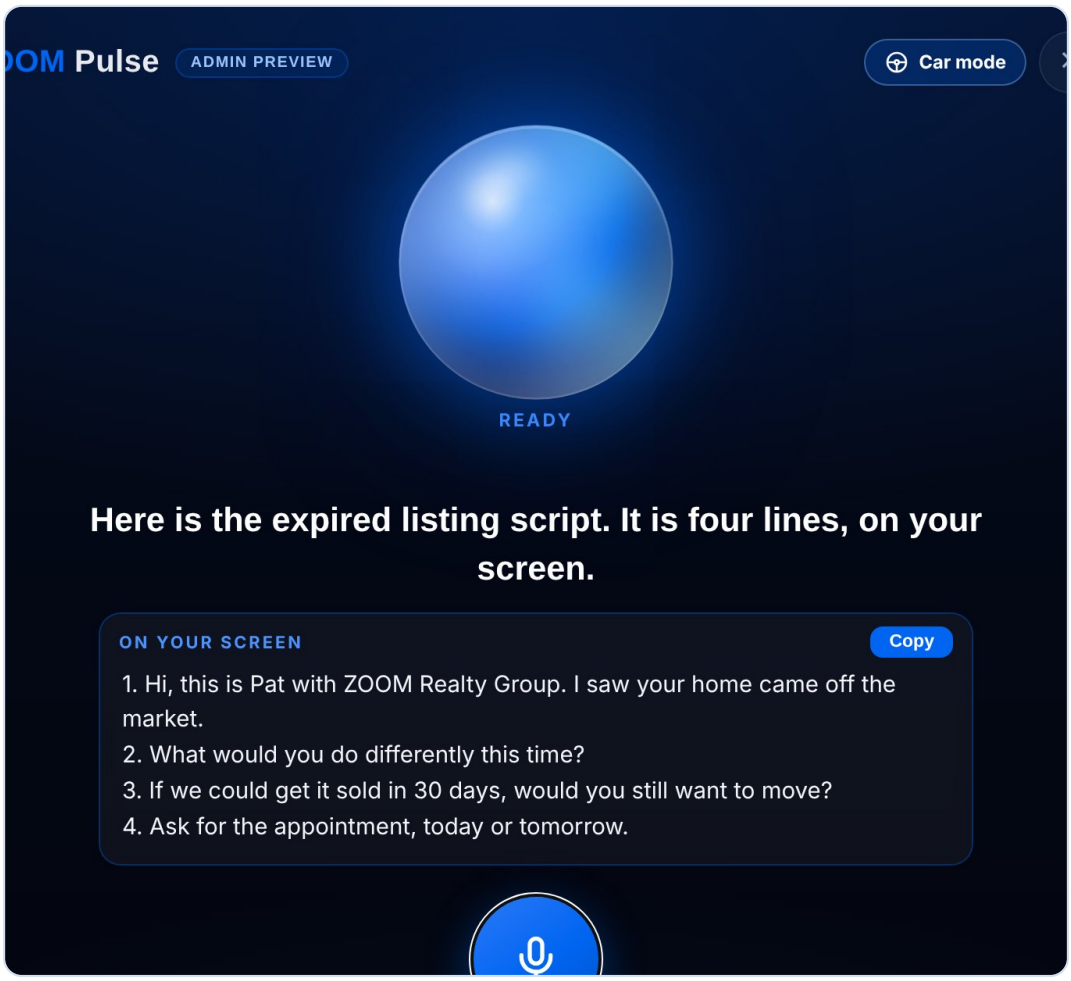
IPHONE AND IPAD

Apple does not let a web page listen in the background, so on iPhone and iPad hands-free stays off. Tap the Pulse button (or hold it) and talk; everything else in this part works the same. On a computer, use Chrome or Edge.

Pulse sees your screen and remembers

"This deal"

Pulse knows what you are looking at. With a deal open, say "what is due on this one?", "text the buyer", or "fill the extension for this deal" and Pulse knows which deal you mean. The same goes for a lead or a Sphere contact you have open. Pulse only ever sees your own records.



SAY AND SHOW Pulse answers out loud and shows the details on screen

"Remember that"

Tell Pulse something once and it uses it from then on: "Remember that I never show on Sundays", "Remember my goal is 24 closings this year", "Remember that Coastal Title is my favorite closing agent". Pulse shows a **Remember this?** card first; it never saves a memory without your OK.

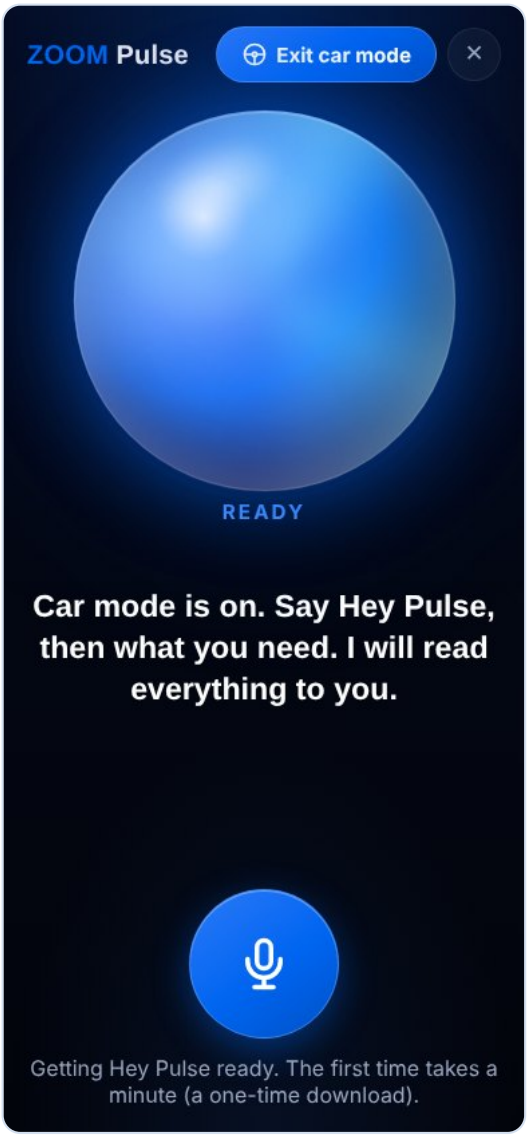
- **"What do you know about me?"** Pulse reads you the list.
- **"Forget that"** or "forget that I never show on Sundays" shows a **Forget this?** card. Approve and it is gone.

Car mode

Between showings, your deals keep moving. Car mode turns Pulse into a big, simple screen you can use with one glance and your voice.

1. Tap the steering wheel (**Car mode**) on Pulse, or say "car mode".
2. Say "Hey Pulse" and what you need. Pulse reads every answer and every card to you; a yes approves it.
3. Anything that needs a screen waits: "I will open it when you stop." Say "exit car mode" when you park.

Car mode is part of the Elite plan. Please only use it hands-free and when it is safe.



CAR MODE Big buttons, spoken cards

What you can say to Pulse about your deals

Say it any way you like; these are examples. Pulse shows a card for anything that changes a deal or sends a message; a plain "yes" approves it, "no" drops it, and "undo" in the next 10 seconds takes it back. Pulse asks one short question when something is missing or two deals match.

Start and open

SAY	WHAT PULSE DOES
"I have a contract on 123 Main"	Opens the contract card on Transactions. Drop the contract on it and Pulse builds the deal.

"Open a new deal for 9 Bay Dr, buyer the Garcias, closing November 15"	Shows a new deal card with the address, client, side, dates and price, all editable. Approve opens the deal with its deadlines. Pulse tells you if that address already has an open deal.
"Start a lease for a tenant at 40 Ocean Blvd" or "Start a listing for 9 Bay Dr"	The same new deal card for a lease (Tenant or Landlord side) or a listing (sale or lease), with the right checklist and forms.
"Open the Garcia deal" or "Open 123 Main"	Opens the Deal page. A lead or a Sphere contact works the same way.
"Take me to my deals"	Opens Transaction Manager.

Forms, signatures and the CDA

SAY	WHAT PULSE DOES
"Fill a form for 123 Main" or "Fill the HOA addendum for this deal"	Opens Fill a Form on that deal, with the form picked when you name it.
"Send a document for signature on 123 Main"	Opens ZOOM Sign on that deal, ready to prepare the envelope.
"Extend the closing on 123 Main to November 5"	The extension, end to end: the addendum filled, the envelope ready for your Approve and Send, then the new date (page **55**).
"Start the CDA for 123 Main"	Opens the CDA on that deal, filled from the deal and your roster terms.
"Who has not signed on 123 Main?"	Each signer and where they are: sent, opened, signed, declined.

The checklist, the dates and the people

SAY	WHAT PULSE DOES
"Mark the home inspection completed on 123 Main"	Shows the checklist item and the deal. Approve ticks that one box. Pulse tells you if it is already ticked.
"Add Tom Lee from Space Coast Inspections as the inspector on 123 Main"	A card with the person and their role. Approve adds them to People on This Deal.
"What is due on 123 Main?" or "What is due this week?"	The deadlines and the status of that deal, or of all your deals.
"Run a net sheet for 123 Main at 450"	Opens the Net Sheet filled from the deal at that price.
"What does the inspection clause mean on the Garcia deal?"	Explains the contract language on your deal. Not legal advice; ask your broker when it matters.

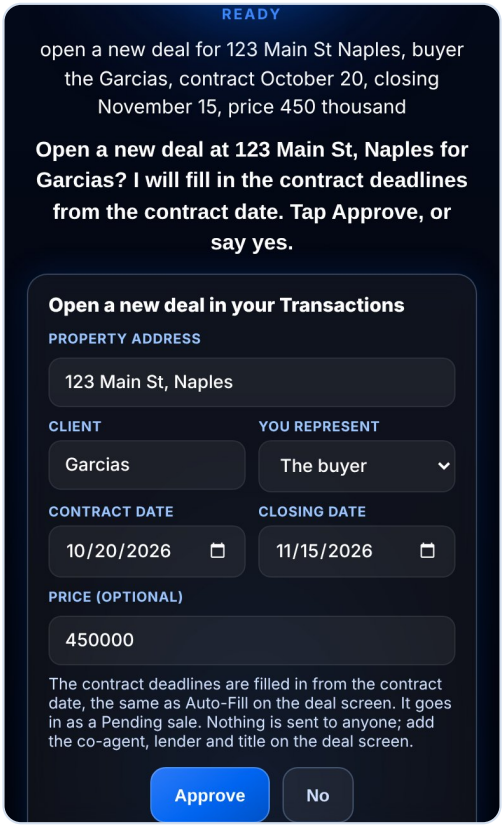
"What is my pipeline worth?" or "What is my commission on 123 Main?"	Works it out from your own deals.

Messages and your calendar

SAY	WHAT PULSE DOES
"Text Maria I am running 10 minutes late"	A text card with the exact words and her number. Approve sends it from your ZOOM AI number.
"Email the lender on 123 Main for the loan commitment"	An email card, from your own Gmail. Approve sends it.
"Haley, call John Smith and tell him the inspection is Thursday at 10"	A read-back card with Haley's exact words. Approve and Haley calls him with that message. Only for people who agreed to be called.
"Move my 2 o'clock to 4" or "Cancel my listing appointment Friday"	A card with the new time and whether your client gets a text. Approve moves it.
"Remind me to call the lender Thursday at 9"	A task card. Approve adds it.

Answers, memory and help

SAY	WHAT PULSE DOES
"What does the inspection clause mean on the Garcia deal?"	Explains the contract language on your deal. Not legal advice; ask your broker when it matters.
"What is my pipeline worth?" or "What is my commission on 123 Main?"	Works it out from your own deals and your roster terms.
"How is the market in Viera?"	An answer from ZOOM AI's market data for that area.
"Remember that I never show on Sundays" / "What do you know about me?"	A Remember this? card / the list of what Pulse remembers (page **60**).
"Read it to me"	Reads today's roll call out loud.
"Report a bug: the deposit date is wrong on 123 Main"	Fills the feedback form for the office; yes sends it.



A PULSE CARD "Open a new deal for ..." with every field editable

WHAT PULSE WILL NOT DO

Pulse never sends, signs, submits or changes a date without your yes. It never contacts anyone on the Do Not Contact list or anyone who replied STOP, never texts during quiet hours, and never talks to a former ZOOM agent about your deals.

REFERENCE

Questions and fixes

Pulse could not read my contract.

Send the PDF from the signing platform, not a photo of a photo. For photos: each page flat, sharp, good light, no HEIC (take a screenshot or share as JPG). Files over 32 MB cannot be read. Nothing was saved, so just try again, or tap Start without the contract.

A date on the timeline is wrong.

Tap it and pick the right day. If the contract was read wrong, the date's tag tells you where it came from. To move the closing date with signatures, use an extension.

My email to deals@zoomai.app did not land on the deal.

Look in Emailed In on My Deals. It waits there when no deal or more than one matched. Pick the deal and tap File on This Deal. Next time put the street address in the subject. Emails from addresses that are not on a deal and not a ZOOM agent are never filed.

A document says Check type.

ZOOM AI was not sure what it is. Open All files on this deal and pick the right type in the box under its name. The checklist slot follows.

The checklist did not tick itself.

It ticks only when ZOOM AI is sure of the type. Fix the type, or tap Mark received on the slot.

I do not see a card I expected.

Cards come from the morning sweep. A card disappears once you approve, skip or the reason is gone (the proof arrived). Nothing goes out between 8:30 PM and 8 AM; an approved card waits and says when.

Submit CDA is grey.

Tick the certify box. If it is still grey, read the red line: the documents the CDA needs first, or a Needed blank on the draft. Request the CDA anyway is there for true exceptions.

Pulse closed a deal that is not closed.

Tap Undo on the deal (14 days). It goes back exactly as it was and Pulse will not close it again.

I cannot see Fill a Form or Send for Signature.

Fill a Form shows when the office has an active form for your side of the deal. Send for Signature shows when ZOOM Sign is on for the brokerage. Only the deal's agent (or an admin) can use them; a co-agent sees the deal as view only.

My signer never got the link.

Check their row: Held for quiet hours means it goes at 8 AM their time. Otherwise tap Send a New Link. Check the email or cell on the People card.

Hey Pulse does not hear me.

Check the pill: it should say Listening for "Hey Pulse". If it says paused, a call, a video or another feature has the microphone; it comes back by itself. Allow the microphone in your browser settings. On iPhone and iPad, tap the Pulse button instead. Speak at a normal volume, a little closer to the computer.

A signer's link stopped working.

A newer link replaced it (a reminder or Send a New Link), the sign-by date passed, or the envelope was voided or countered. Open it in ZOOM Sign: Edit sends it again, or Send a New Link on their row.

My client wants to change a price or a date.

Make a Counter on the document (page **48**). Round 1 is kept exactly as it was.

The other agent never added their clients.

Their turn comes first. Pulse tells you when it stalls. Call them, or tap Send a New Link on their row.

Pulse did something I did not expect.

Open the deal's activity: every step Pulse took is there, signed ZOOM Pulse, with the reason. A file Pulse closed has Undo for 14 days. Anything else, tell the office or say "Report a bug" to Pulse.

I need the old screen.

Tap classic card at the bottom of any Deal page. The pill Back to Transactions 3.0 brings you back.

KEEP THIS ONE HANDY

The cheat sheet

START A DEAL

- **I Have a Contract:** drop it, check, Approve
- **Say:** "Hey Pulse, I have a contract on 123 Main"
- **Start Without a Contract:** five boxes
- **Listing:** This is a new listing instead

EVERY MORNING

- Open Pulse: today's roll call
- Pulse Needs You: red first
- Cards: Approve, Edit or Skip
- Coming Up This Week: call your client

THE COLORS

- 🔴 **Red:** due in 2 days or less, or past closing
- 🟡 **Amber:** 3 to 7 days
- 🟢 **Green dot:** on track
- ⚪ **Grey:** no date, or closed

DOCUMENTS

- Drop anywhere on the Deal page
- Email **deals@zoomai.app**, address in the subject
- Check type: pick the right type
- Share with client: the switch on the file

THE STAGES

- Listing, Under Contract, Clear to Close, Closed
- Plus Expired and Cancelled
- Change it: the stage button on the deal

SENT BACK BY THE BROKER

- Text with the reason and the link
- Fix it, file the new copy, same type
- Old copy leaves the waiting list

THE CDA

- Pulse drafts it near closing
- Check or change, tick certify, Submit CDA
- Admin approves, you get a text
- CD and the CDA item never block it

CLOSING

- Pulse closes: date passed + CDA approved + settlement statement
- Undo for 14 days
- Portal: Welcome Home
- Review and referral asks: you approve

ZOOM SIGN

- Send for Signature, or ZOOM Sign in the sidebar
- Approve and Send; a sign-by date if you want
- Counter, the other side, in person, Spanish
- Pulse tells you: opened, signed, declined, stalled
- Check it: zoomai.app/verify

FORMS

- Fill a Form: the deal fills it
- Tick the forms that go with it: one document
- Save These Forms as a Packet
- Your packets sit at the top next time

HEY PULSE

- Turn on Hands-free Hey Pulse once
- "Hey Pulse, what is due this week?"
- "This deal" means the one on screen
- "Remember that..." and "car mode"

PULSE RULES

- Pulse works on its own; **you** approve what leaves
- Pulse flags; **the broker** decides
- No messages 8:30 PM to 8 AM
- 10 seconds to undo, every time

We built Transaction Manager so that no ZOOM agent ever loses a deal, a deposit or a weekend to paperwork again. Send the contract, answer Pulse, take care of your client. We have the rest.

Dan Vallee
FOUNDER, BROKER / OWNER & CEO

Nicole Vallee
CO-FOUNDER, OWNER & COO

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