

zipForm® Plus Release Notes

Release Date: 3/29/2017

This document outlines the updates that are included in the 3/29/2017 release. You can access additional help content and videos that pertain to the items in the release by visiting the link below.

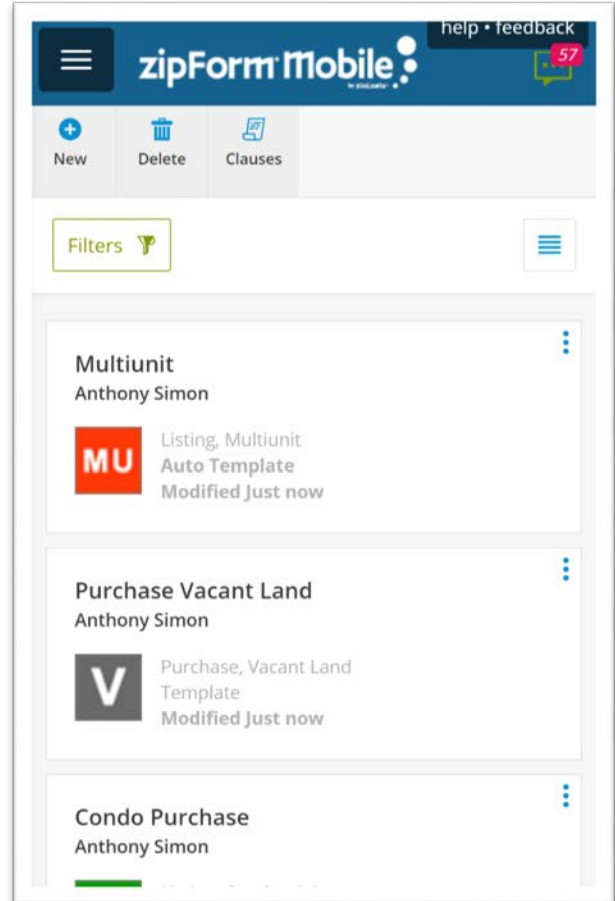
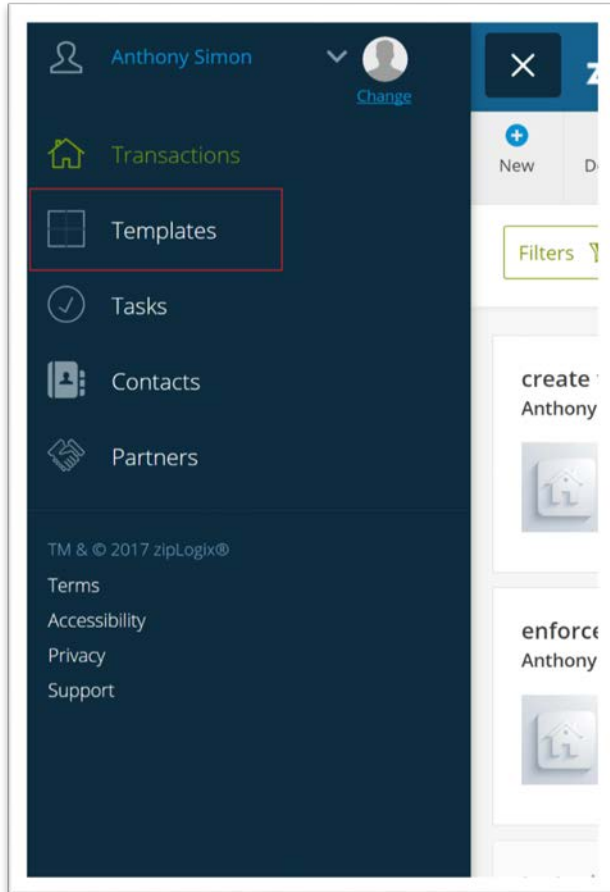
- <http://support.zipform.com>

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Mobile Templates

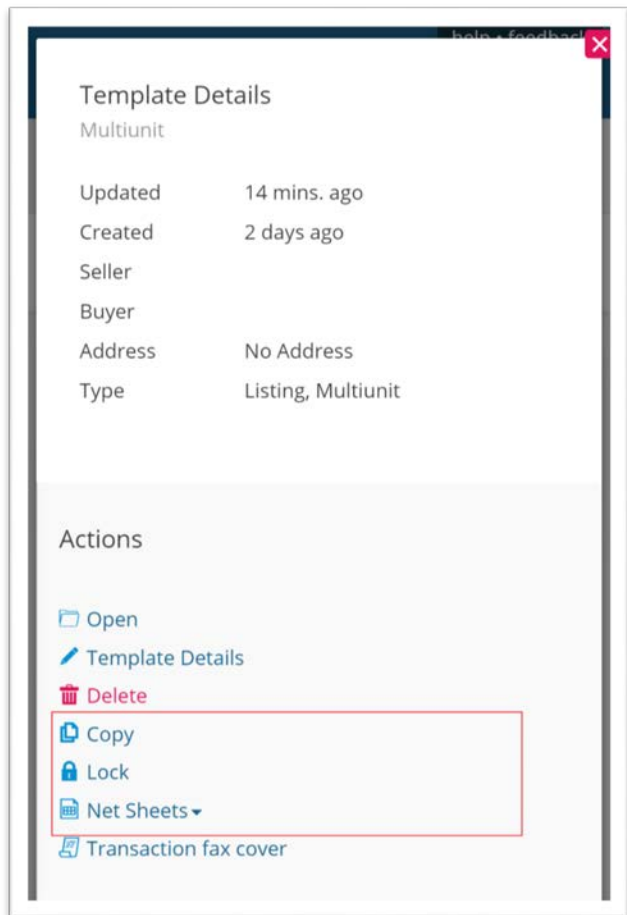
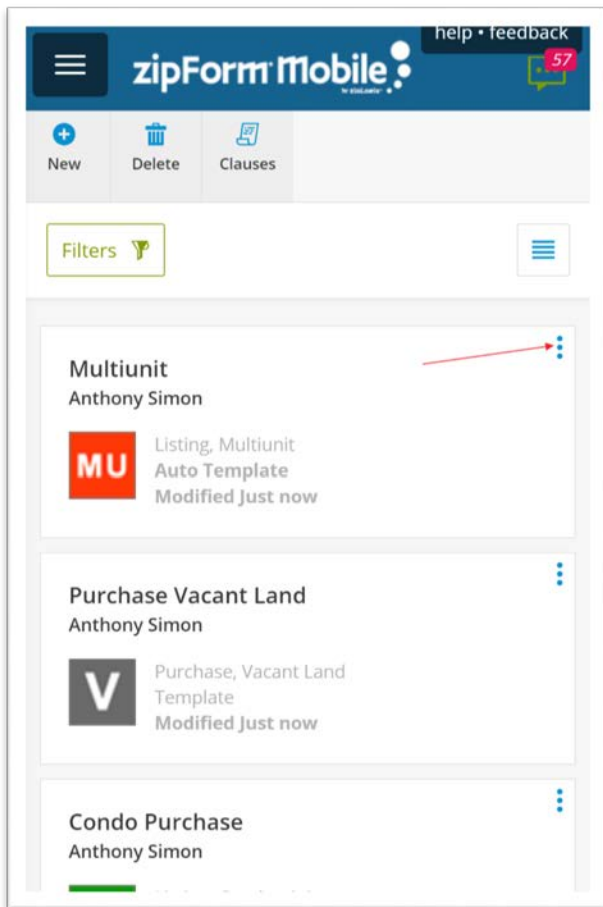
You can now manage templates from your mobile device.



Template Functions

In addition to creating and managing templates, you now have access to a number of other templates functions too.

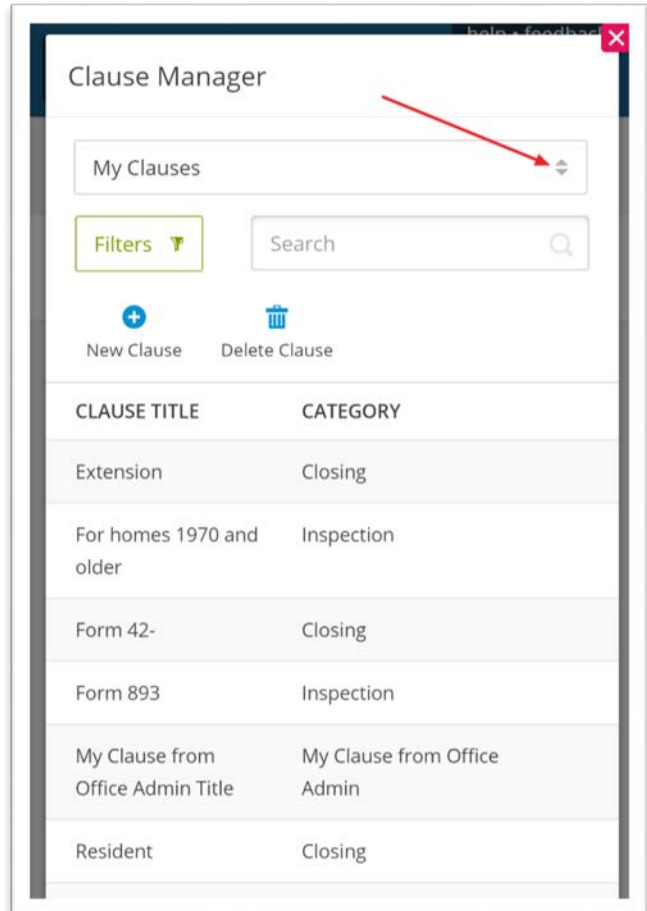
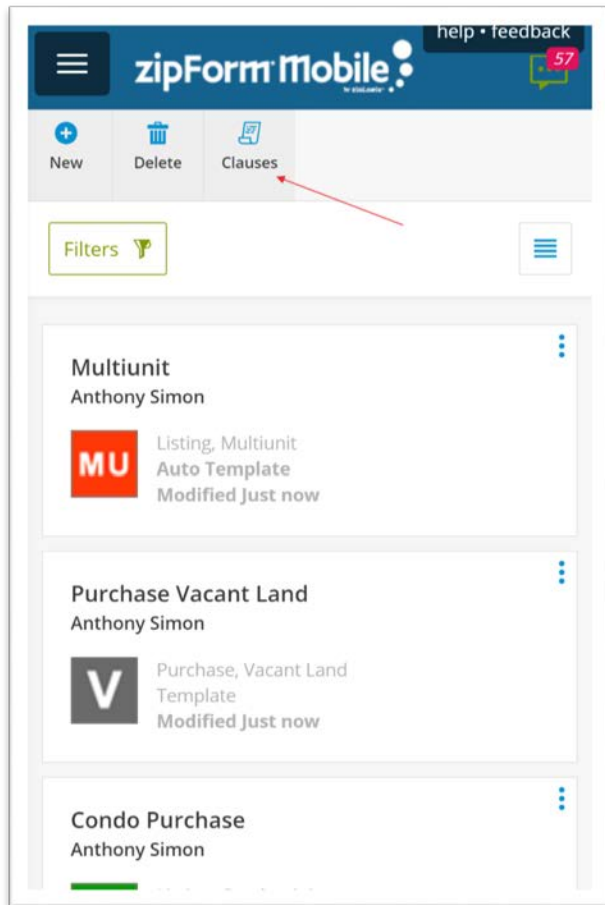
- Import/Export
- Lock/Unlock
- Net Sheets
 1. Net Sheets are only available for Texas users that have the Texas form Library
- Copy Template



Clause Manager

In addition to accessing clauses while working with forms, you can manage clauses from your mobile device too.

Clauses are available in templates and transactions.



Transactions Functions

Access a number of transaction management functions from your mobile device.

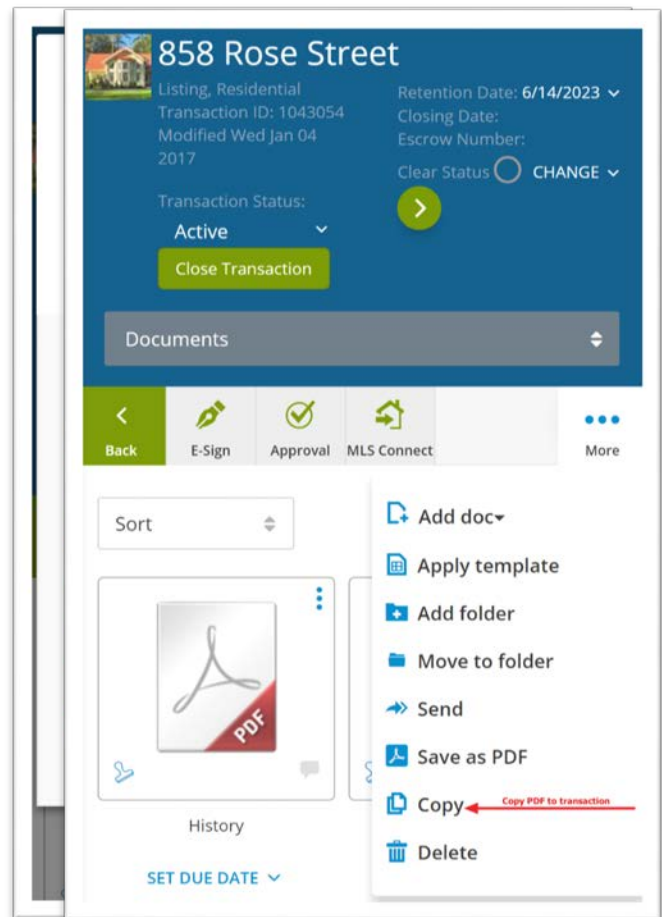
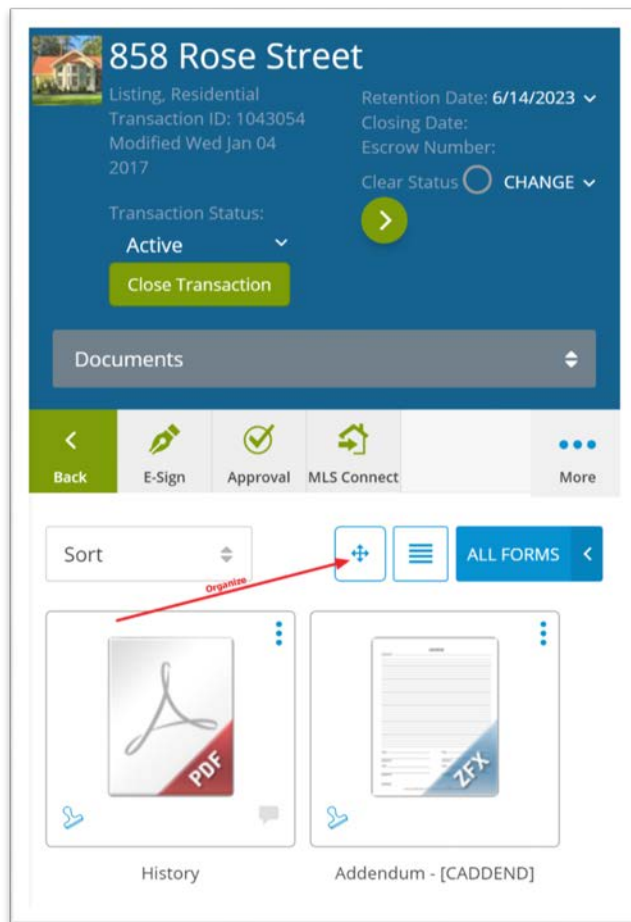
- Import/Export
- Lock/Unlock
- Net Sheets
 - 1. Net Sheets are only available for Texas users that have the Texas form Library
- Copy
- Save transaction as a template
- Enhanced sorting
 - 1. Closing date
 - 2. Approval
 - 3. Transaction ID

The image displays three screenshots from the zipLogix mobile application. The top-left screenshot shows a sorting menu with options: Most Recent, Oldest First, Name A-Z, Name Z-A, Transaction ID Asc (highlighted with a red box), Transaction ID Desc, Closing Date Asc, Closing Date Desc, Approval Asc, and Approval Desc. The top-right screenshot shows transaction details for a purchase by John Doe, including fields for Seller, Buyer, Address, Type, Transaction ID, Escrow Number, Closing date, and Previous Owner. The bottom-left screenshot shows a list of transactions, with a red arrow pointing to a three-dot menu icon next to the first entry. The bottom-right screenshot shows the 'Actions' menu for a transaction, with a red box around 'Copy' and 'Save as template', and red arrows pointing to 'Lock' and 'Net Sheets'.

Document Functions

Manage your documents on the go with a number of new management functions added to zipForm® Mobile.

- Comment indicator in tile/brick view
 - Appears blue when there's a comment
- Organize and save a default order for your documents to appear in
- Split PDFs
- Copy PDFs to other transactions
- Save forms as PDFs
 - Only for .zfx forms
- Edit Document (name)



Document Detail

Name: History

Modified: Tue Jun 14 2016

Version: 1

Comment:

Menu Options

- Open
- Edit Details** ←
- Remove
- Print
- View Versions
- Select Version
- Sign
- Email
- Move to folder
- Split** ←
- Add Comment

858 Rose Street

Listing, Residential
Transaction ID: 1043054
Modified Wed Jan 04 2017

Retention Date: 6/14/2023 ▾
Closing Date:
Escrow Number:
Clear Status CHANGE ▾

Transaction Status: Active ▾

Close Transaction

Documents ▾

Back E-Sign Approval MLS Connect More

Sort ▾

History

SET DUE DATE ▾

- Add doc ▾
- Apply template
- Add folder
- Move to folder
- Send
- Save as PDF
- Copy** ← Copy PDF to transaction
- Delete

E-Sign Statuses

Now you can easily see signer status without ever leaving zipForm® Plus. The following statuses are accessible when viewing a signature packet:

- Completed Signing
 - Displayed when the user has finished signing
- Bounced Email
 - Displayed when an email isn't delivered
- User opted out
 - The user has chosen to cancel the signing process for some reason

