

# zipForm® Mobile Release Notes

Release Date: 5/3/2017

This document outlines the updates that are included in the 5/3/2017 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>

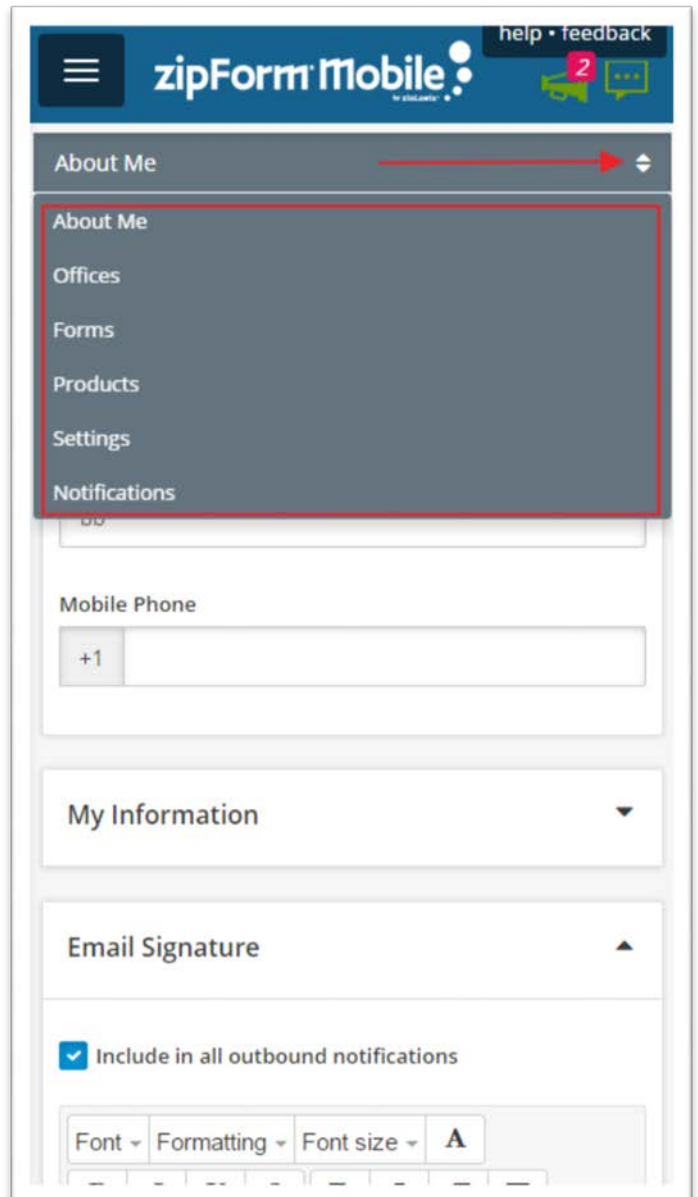
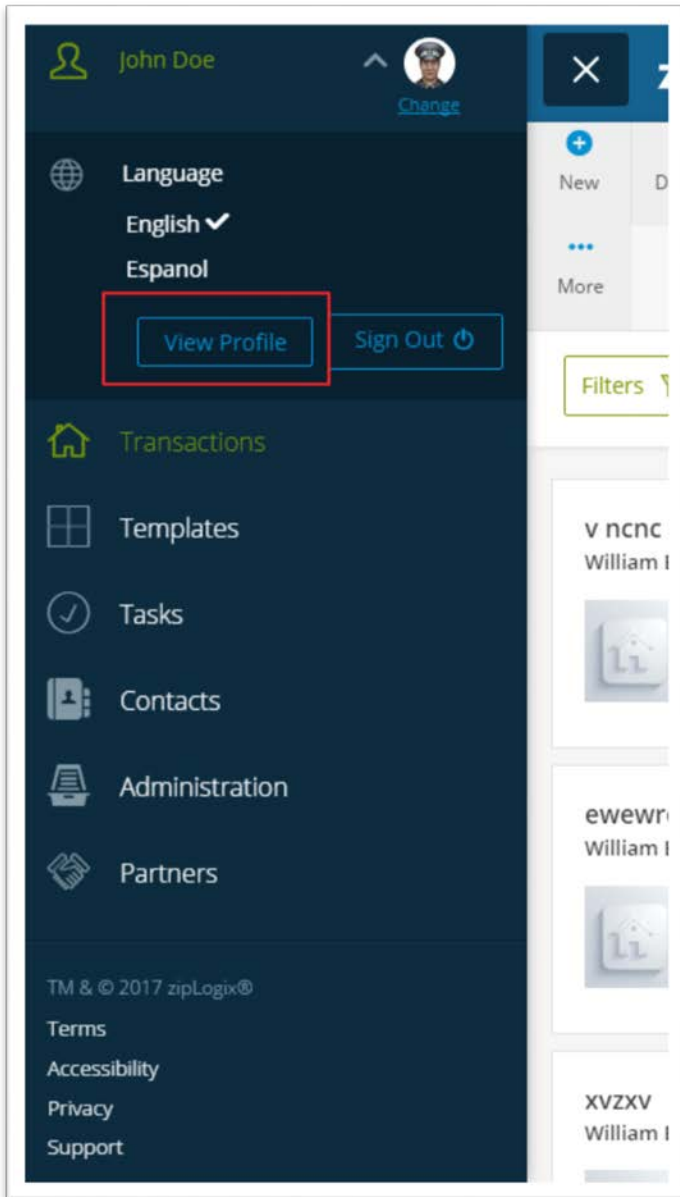
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# Profile Management

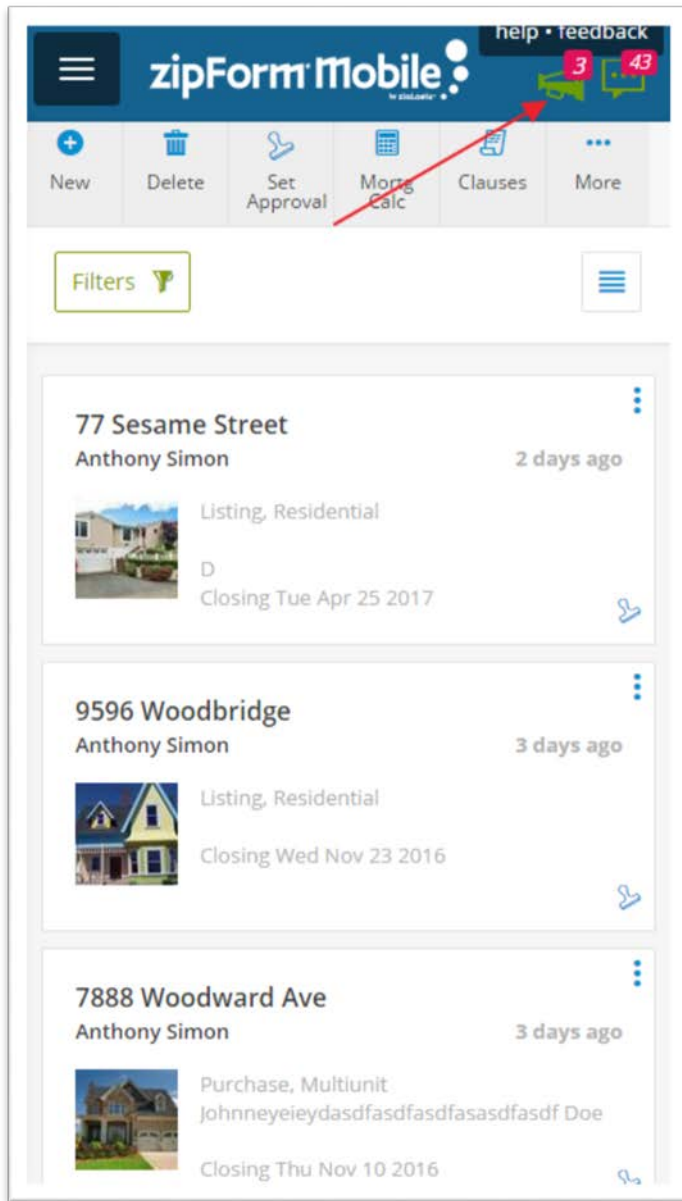
You can now manage your profile from your mobile device

- Edit your personal information
- Manage your forms and products
- Set notification preferences
- Link your accounts
- More!



# Bulletins

You will now receive important reminders and other notifications on your mobile device.



# Transaction Summary

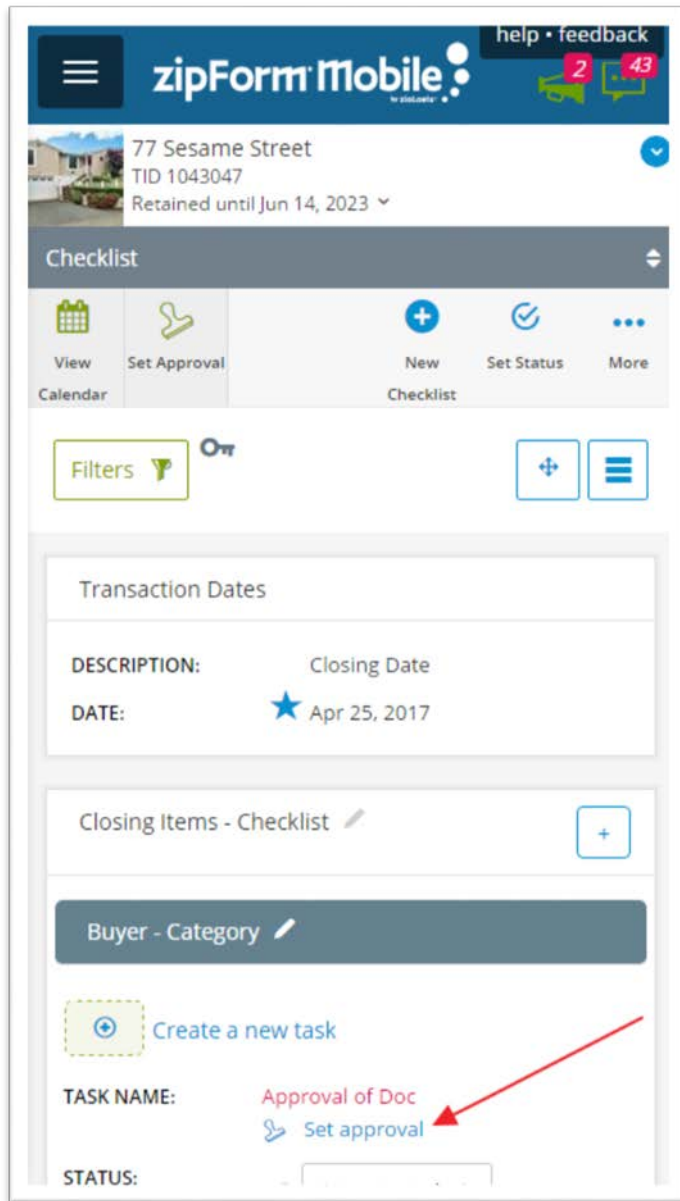
Important transaction information is now readily available upon opening a transaction.

- Easily manage the transaction status and approval
- See a summary of key information and transaction parties
- View checklist progress **\*tablet only**
- Quickly perform important tasks
  - Apply a template
  - Email or fax documents into the transaction
  - Add and sign documents

The screenshot displays the zipForm Mobile app interface. At the top, there is a navigation bar with the zipForm Mobile logo, a help/feedback link, and notification counts (2 and 43). Below the navigation bar, the address "77 Sesame Street" and TID "1043047" are shown, along with a retention date of "Retained until Jun 14, 2023". The main section is titled "Transaction Summary" and shows the listing type as "Listing Residential" with a "Modified 2 days ago" timestamp. A dropdown menu is set to "Active", and a blue "CLOSE TRANSACTION" button is visible. A red arrow points to the text "NEEDS APPROVAL" with a small orange icon. Below this, a red-bordered box highlights a grid of six icons: a window, a printer, a calculator, a document with a plus sign, a group of people, and a pen. At the bottom, there is a "Property Summary" section with "Cancel" and "Save" buttons, and input fields for "MLS Number" (6456453456), "Street Address" (77 Sesame Street), and "Unit Number" (5).

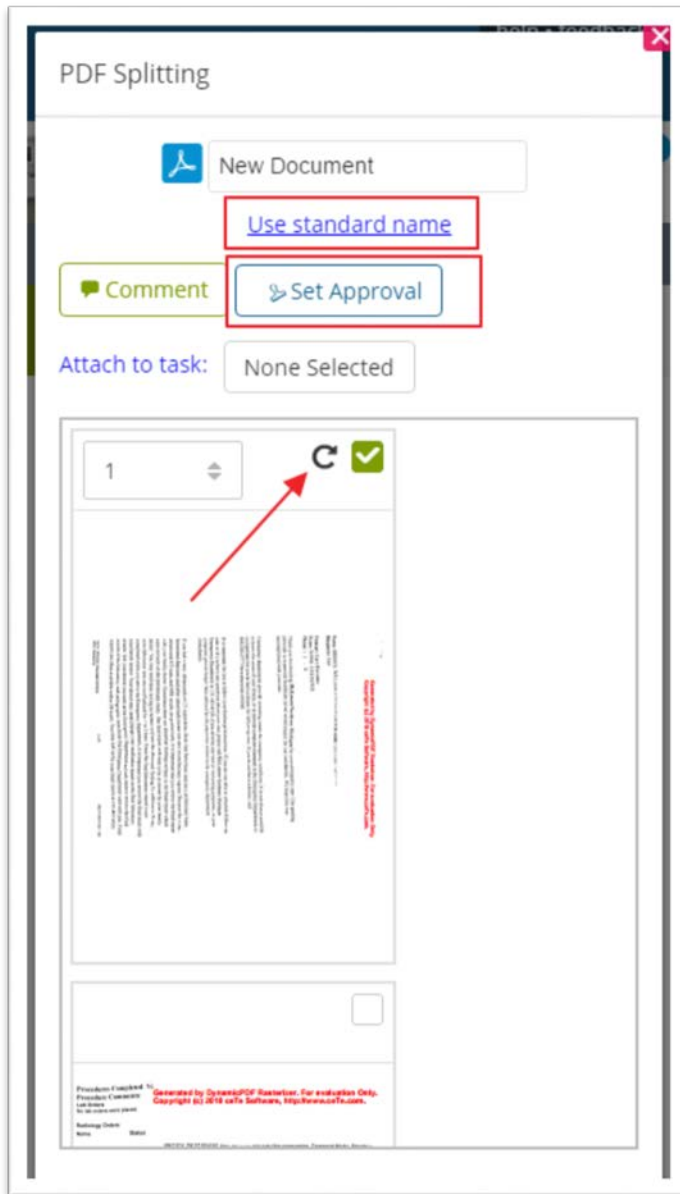
# Task Approval

Request and manage task approvals from your mobile device.



## PDF Split Improvements

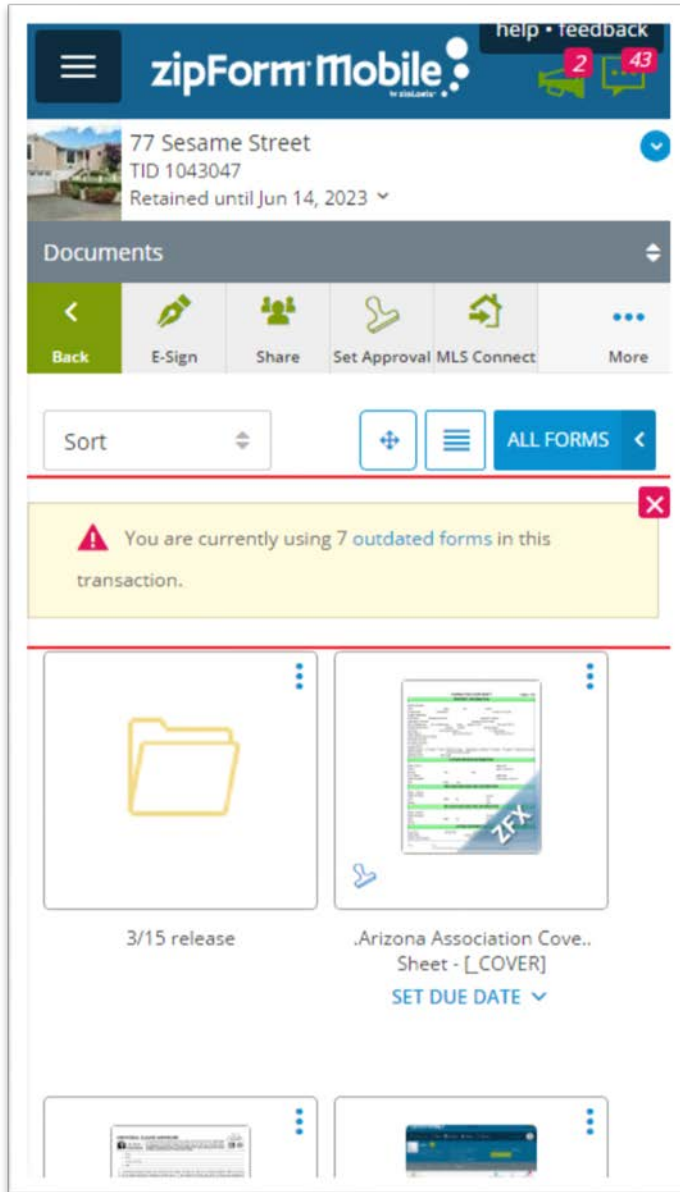
- Change page orientation
- Attach split PDF directly to a task
- Choose a default name
  - Fill existing placeholder
  - Select a form name



## Outdated Forms in Transaction Notification

Unless a transaction is in a 'Closed' status, we will notify you when open a transaction that has outdated forms.

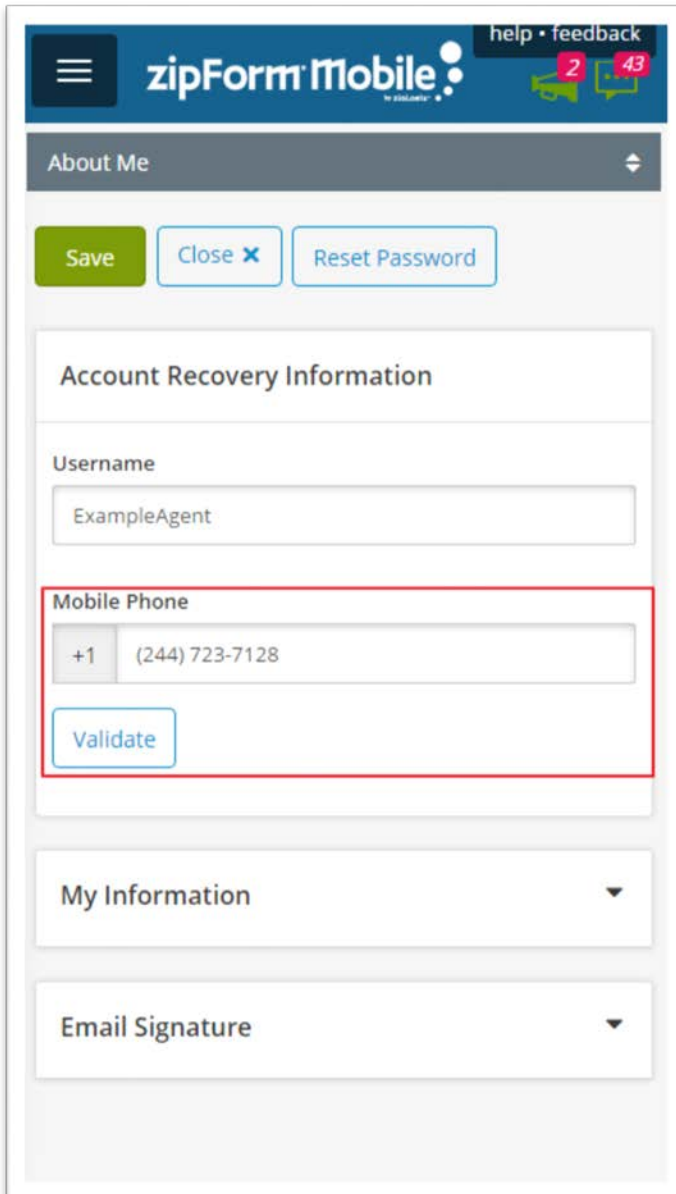
- You must remove the old form that was added to the transaction for the new version to be used. **\*You may lose data that was added to the old form when you remove it and add the current version.**
- This applies to brokerage and association forms



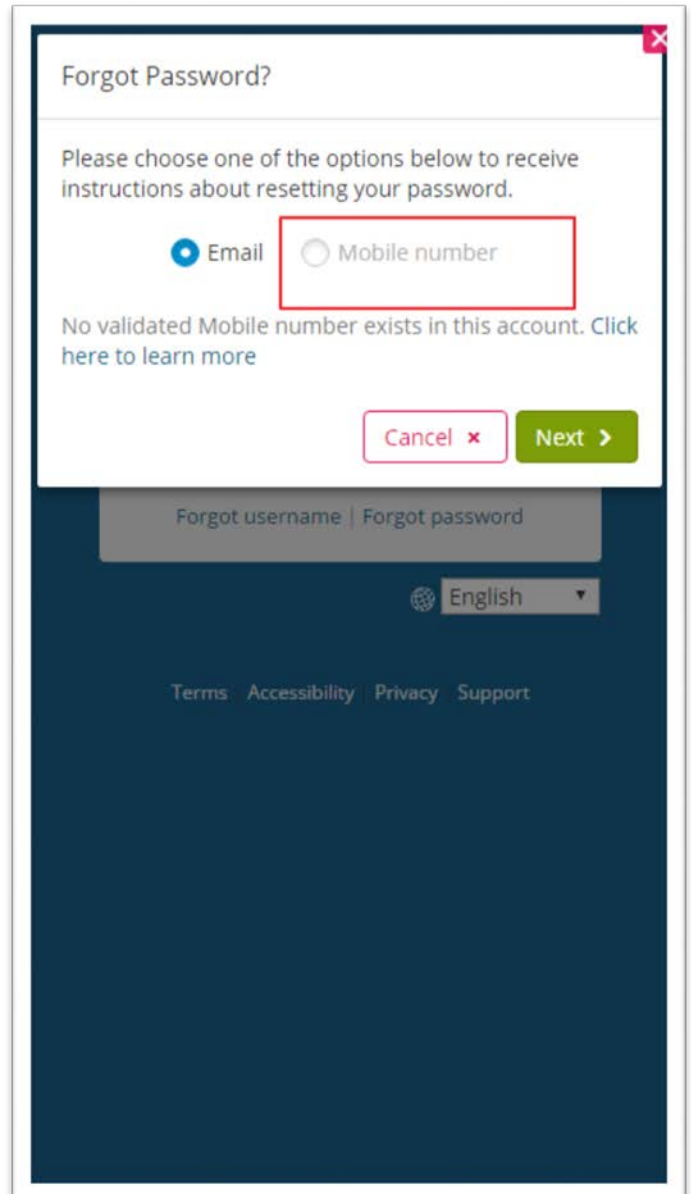
## SMS Recovery

You can now recover a forgotten password using your mobile device. You must first have a validated phone stored in your user profile to use this feature.

After you select 'Forgot password', you will be prompted to select a recovery option. If you have a validated mobile number on file, you can select the 'Mobile number' option. You will receive a code that must be entered before it expires. You will be able to reset your password after you've entered the correct code.



The screenshot shows the 'zipForm Mobile' user interface. At the top, there is a navigation bar with a menu icon, the logo, and 'help • feedback' with notification counts. Below this is a 'About Me' section with 'Save', 'Close', and 'Reset Password' buttons. The 'Account Recovery Information' section contains a 'Username' field with 'ExampleAgent' and a 'Mobile Phone' field with '+1 (244) 723-7128' and a 'Validate' button. The 'Mobile Phone' field is highlighted with a red border. Below are 'My Information' and 'Email Signature' dropdown menus.



The screenshot shows a 'Forgot Password?' dialog box. It asks the user to choose an option to receive instructions: 'Email' (selected) and 'Mobile number' (highlighted with a red border). Below the options, it states: 'No validated Mobile number exists in this account. Click here to learn more'. At the bottom are 'Cancel' and 'Next' buttons. The background shows a navigation bar with 'Forgot username | Forgot password' and a language dropdown set to 'English'.



# General UI

- Document organization
- Improved contact scheme

