zipForm® Plus Release Notes

Release Date: 6/7/2017

This document outlines the updates that are included in the 6/7/2017 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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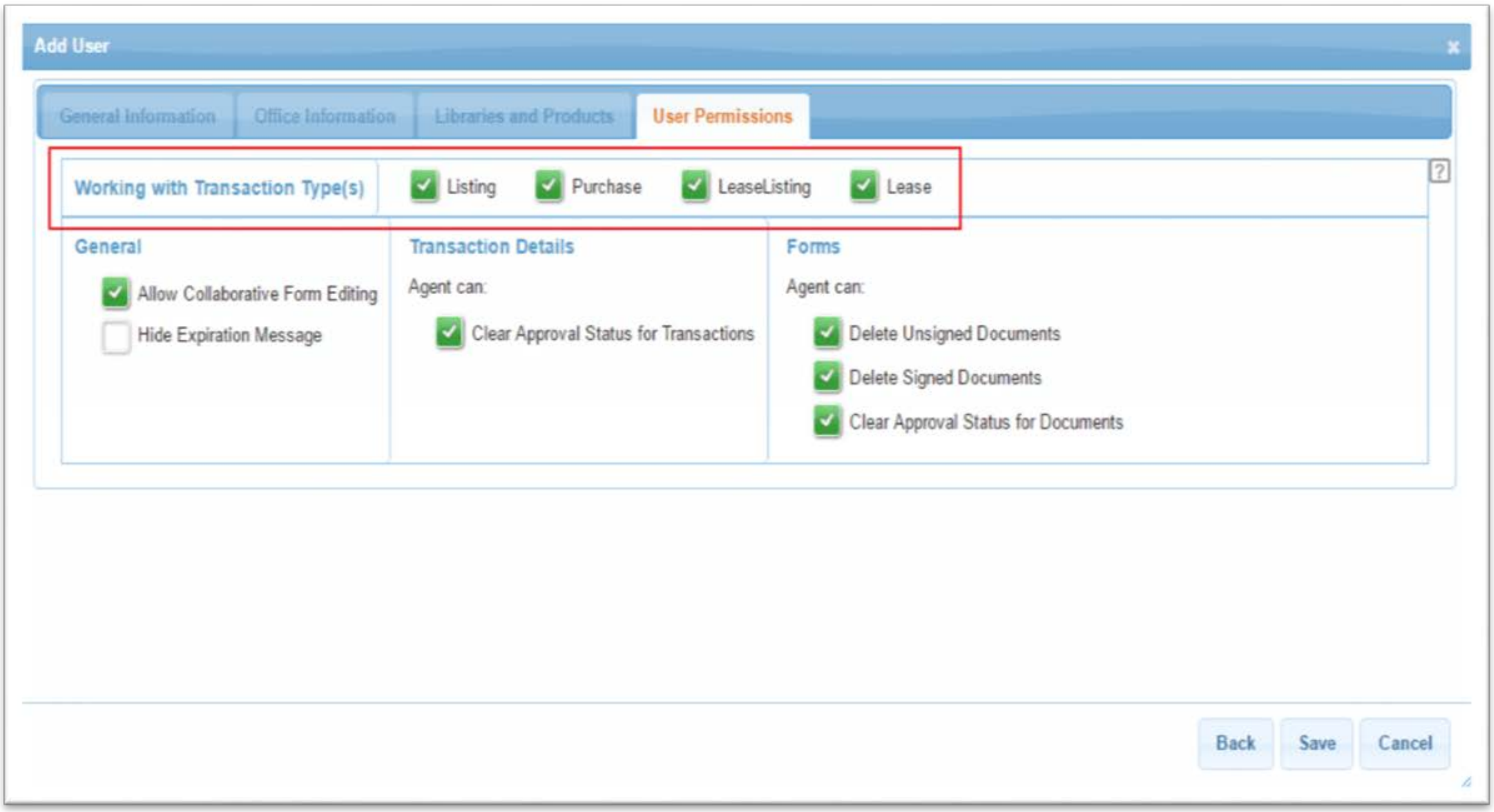
Transaction Oversight

This feature is available for broker accounts and only applies to

- Transaction Coordinators
- Location Administrators

Assigning oversight is done through the permission section. A user is given complete oversight by default.



What it Means

Applying a specific transaction oversight type(s) will limit the ability for the TC or Location Admin to interact with transactions that are outside their oversight permission.

For example, a user that has oversight over listings will only see listings in their transaction list, receive notifications for listings, etc. The user shouldn't be able to see, create, interact or be notified regarding any other transaction types.

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Below is list of areas that will be limited based on the transaction oversight permission:

- Transactions
- Templates
- Tasks
- Transaction Retention Page
- Notifications
- Dashboard/Reports
    - o No financial information/widgets will be made available to locations admins with anything except complete transaction oversight i.e. listings, lease-listings, purchases and leases

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