

zipForm® Plus Release Notes

Release Date: 9/27/2017

This document outlines the updates that are included in the 9/27/2017 release. You can access additional help content and videos that pertain to the items in the release by visiting the link below.

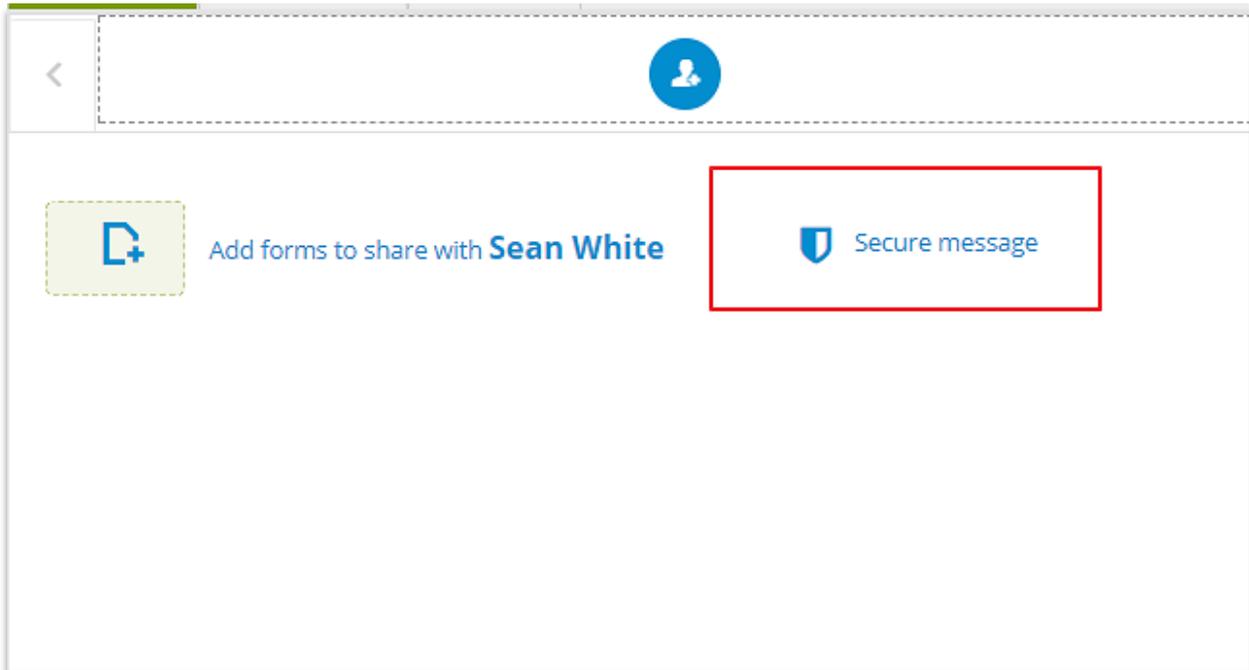
- <https://ziplogix.com/support>

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Secure Messaging

In addition to sharing documents with clients and other parties, you can now share a message more securely than traditional email. Simply set a message for the intended party and they will receive a generic email letting them know a message is ready to be viewed. After they sign in to zipCommunity™, they will see the message you posted.

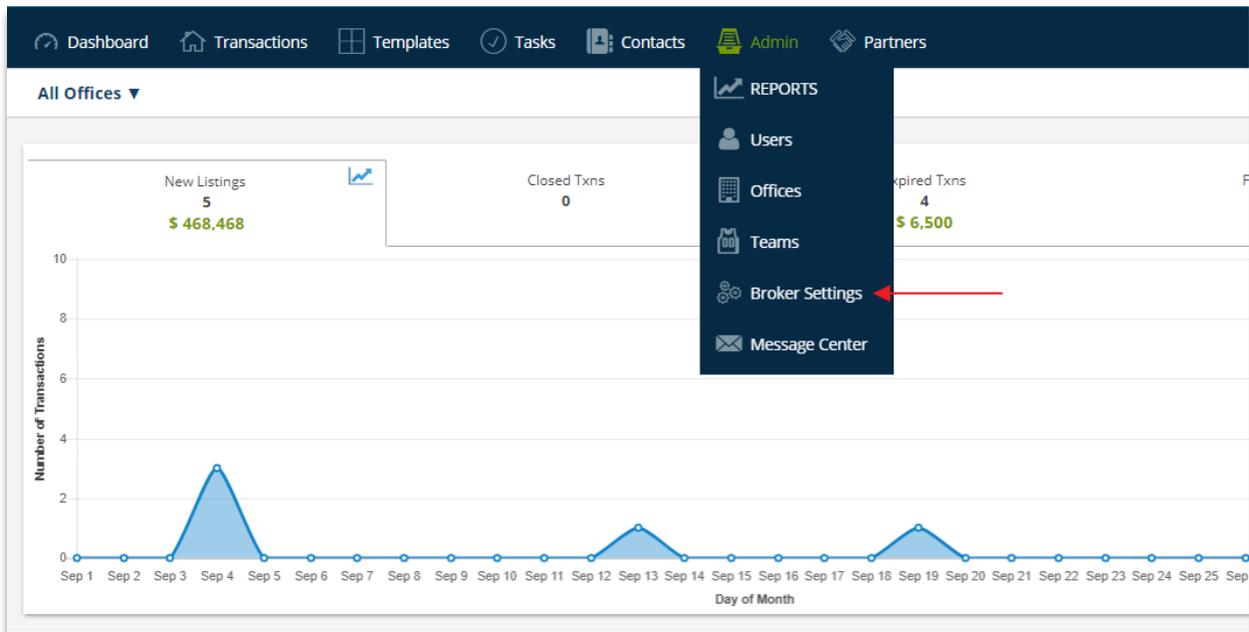


Broker Settings

Broker administrators now have an area where they can manage permissions and notifications for the brokerage.

1. Permissions
 - a. Allow agents to grant form editing rights for share recipients
 - b. Allow agents to deleted transaction
 - c. Allow agents to delete unsigned documents
 - d. Allow agents to deleted signed documents
2. Notifications
 - a. Notify admins and transaction coordinators when a transaction status is changed
 - b. Notify admins and transaction coordinators when any placeholder is filled
 - c. Notify admins and transaction coordinators when ALL REQUIRED placeholders are filled
3. Approval
 - a. Turn document approval off for the entire brokerage

With the exceptions of hiding document approval, permissions and notifications can be changed for individual offices. Permissions can also be changed at the user level within a given office.



Enhanced Control for Approval Notifications

Office and broker admins can now turn off approval notifications at an office or individual user level. Choose whom to receive notifications from.

Broker Approval Notification Settings

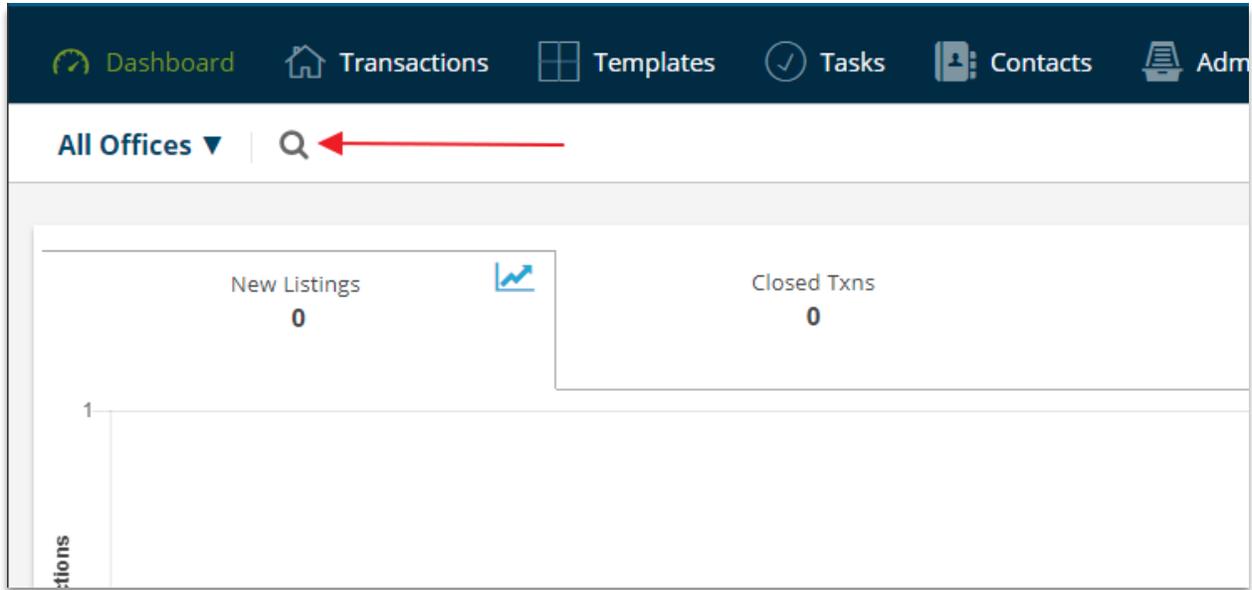
Email Notification Off

In App Notification On

- ▶ All users in "Admin's Corner" On
- ▶ All users in "Briggs Brokerage - Corporate" On
- ▶ All users in "Briggs Second Location" On
- ▶ All users in "Briggs Third Office Location" On
- ▶ All users in "MyOffice" On
- ▶ All users in "Red Five" On
- ▶ All users in "VIC Corporate Office" On
- ▶ All users in "test office" On

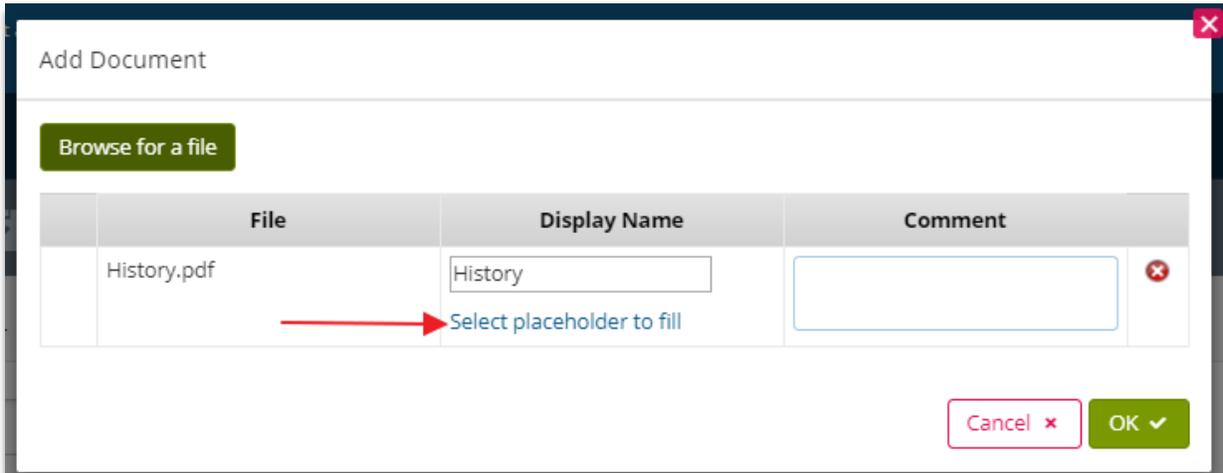
Transaction Search in Broker Dashboard

Admins with access to the broker dashboard can now search for a transaction from their dashboard.



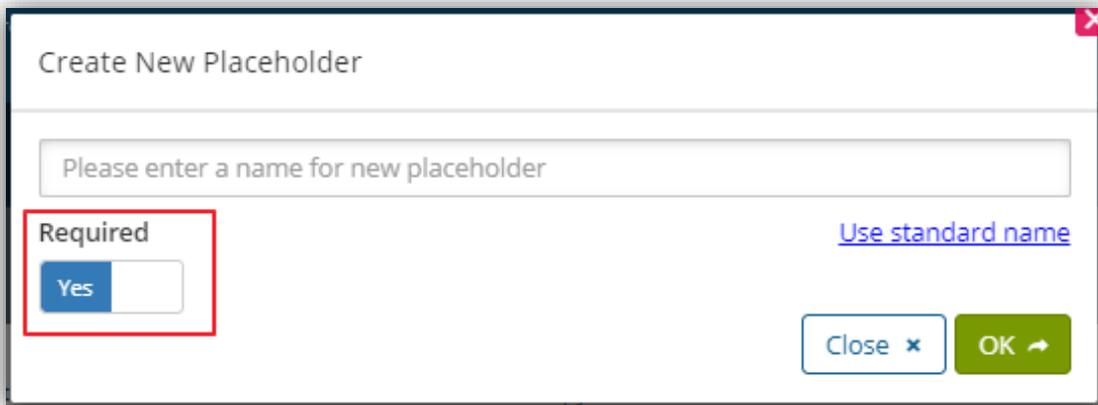
Auto-fill Placeholders

Today, you can automatically fill a placeholder when a signed copy of a document with a matching name is returned. You also have the option to fill a placeholder when splitting a PDF. The same capabilities are now available when adding a document to the transaction. If the document has the same name as the placeholder, it will automatically fill that placeholder. You can also manually choose a placeholder to fill.



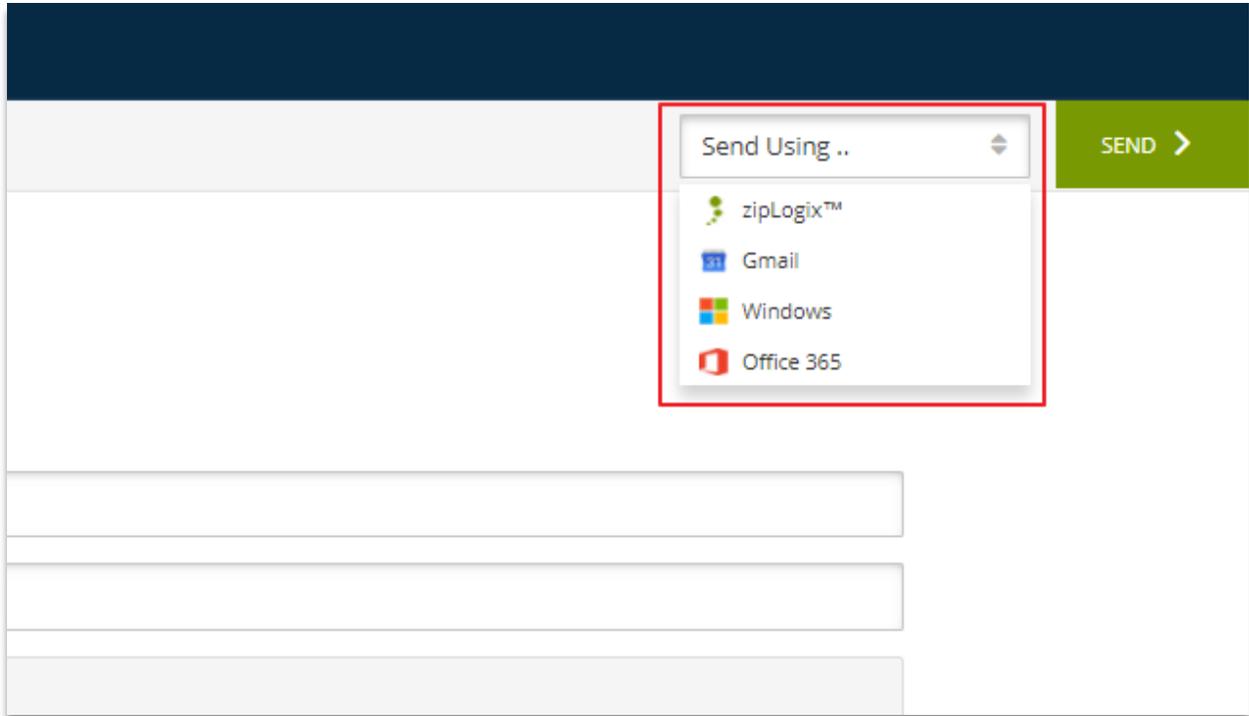
Required Placeholder

You can now mark a placeholder as required. Making it part of an enforced template will prevent users without the permission to override enforced templates from making the place not required.



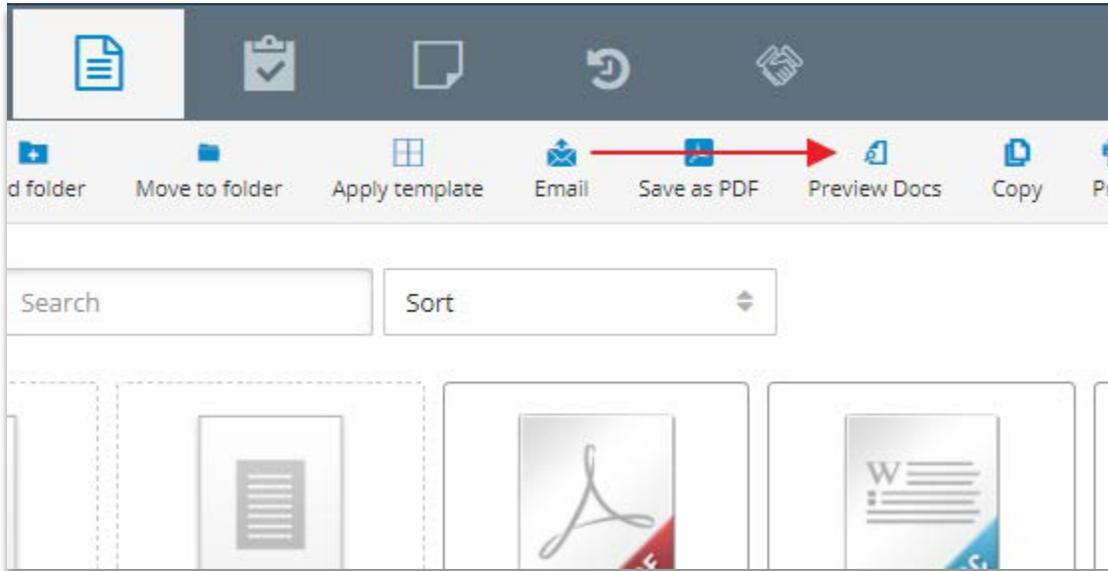
Webmail Integrations

When sending outbound emails from zipForm® Plus, you can choose an email provider to send the email through. The email that's delivered will appear from the client you selected.



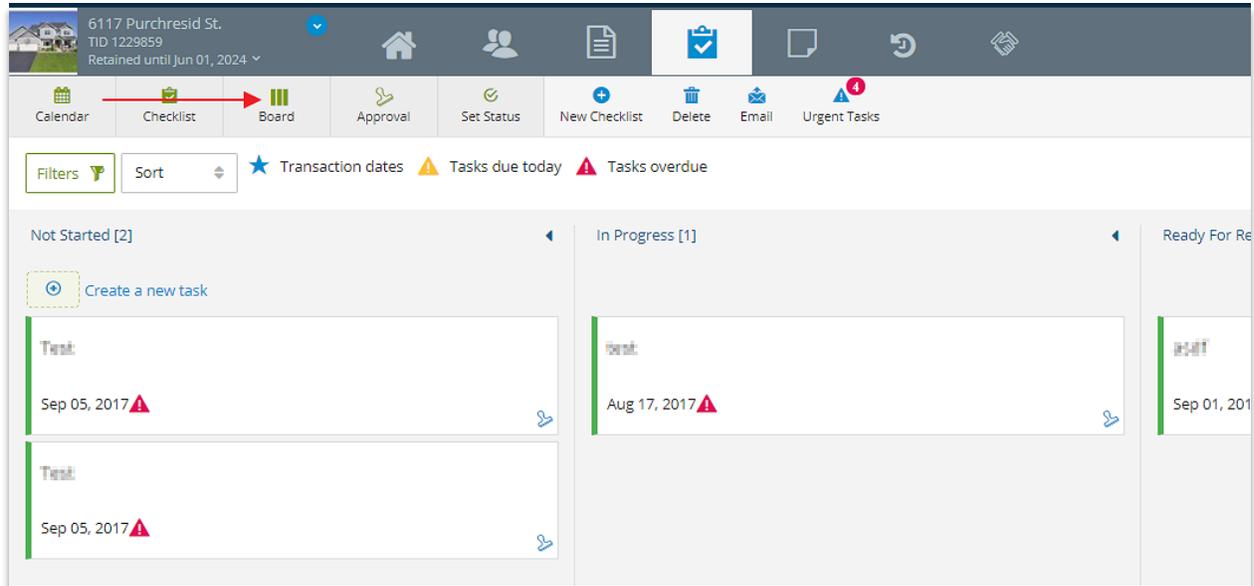
Preview Multiple Forms and Documents

Select multiple forms and documents to view at once with "Preview Docs".



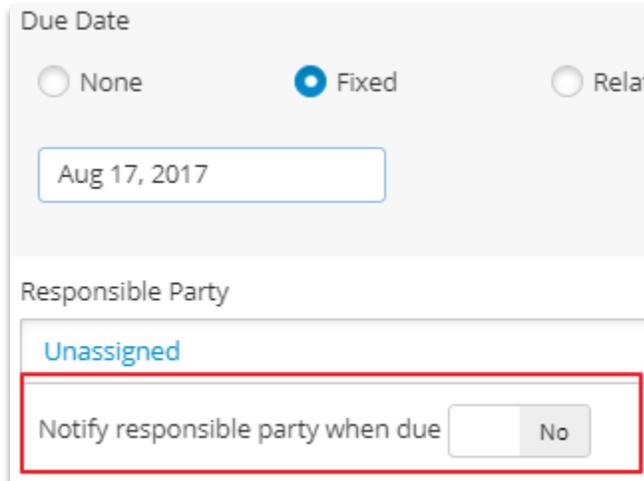
Board View for Checklists/Tasks

Board view improves the visual management of tasks. Drag and drop tasks from one column to another. The status of the task will update when it's moved.



Notify Responsible Parties

Responsible parties can now receive an email notification for tasks they're assigned. Unless the task is marked "Completed", a notification is sent the day the task is due and the following day it's overdue. You must have a valid email address entered for the responsible party to receive the notification.



The screenshot shows a configuration form with two main sections. The first section, titled "Due Date", contains three radio buttons: "None", "Fixed" (which is selected), and "Relat". Below these is a text input field containing "Aug 17, 2017". The second section, titled "Responsible Party", contains a dropdown menu with "Unassigned" selected. Below the dropdown is a toggle switch labeled "Notify responsible party when due" with a "No" button next to it. A red rectangular box highlights the "Notify responsible party when due" label and the "No" button.

Miscellaneous

1. Forms Advisor and Forms Tutor are now available in the form viewer
 - a. Available for C.A.R. Members only
2. Clause Manager is now available in the form viewer
3. Buttons that go to the sign in page have been added to various email notifications sent from zipForm® Plus
4. New videos and guides have been added to Guided Help