

zipForm® Plus and zipTMS™ Release Notes

Release Date: 11/30/2016

This document outlines the updates that are included in the 11/30/2016 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/...>

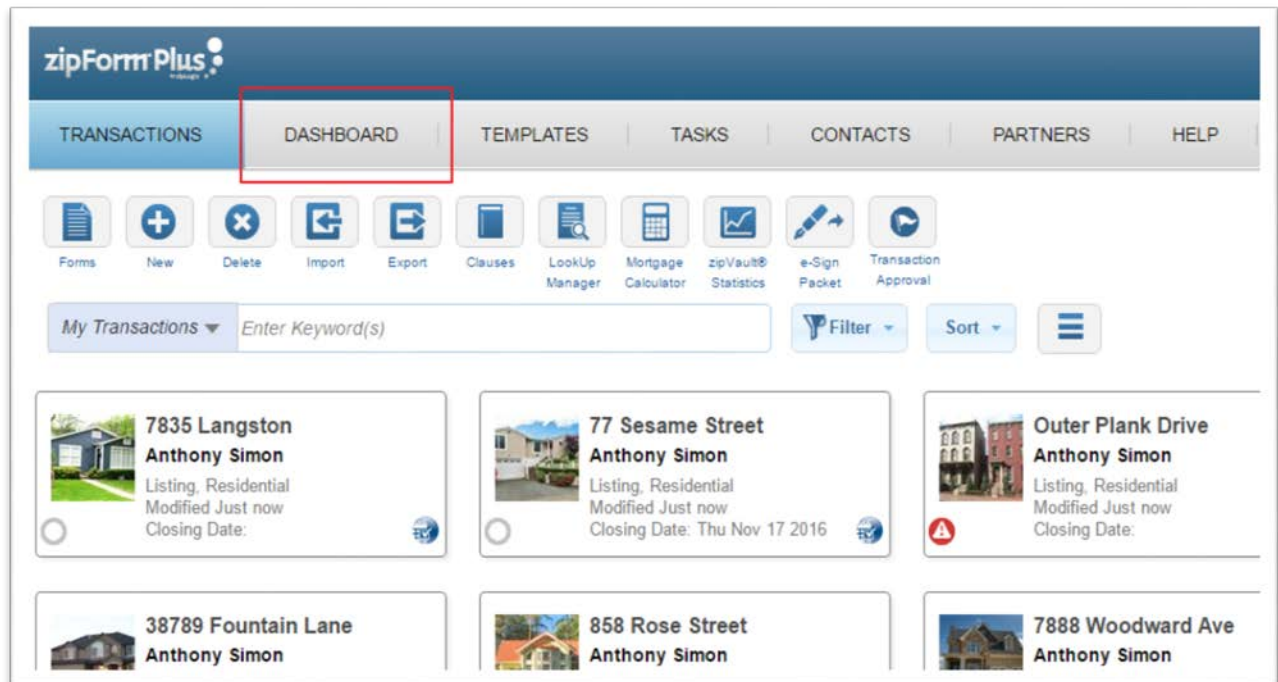
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Agent Dashboard

The Agent Dashboard is available for single agent accounts, Broker and Team versions of the product.

- To get started, select the 'DASHBOARD' option in the navigation bar



The Agent Dashboard is made up of widgets that help you better manage transactions. The following widgets are available in the dashboard:

- Transaction Charts
- zipTMS™ Monthly Tasks
- zipTMS™ Monthly Transaction Dates
- Recent Transaction Activity
- Property and Transaction Types
- Listing Map
- Transaction Values

Transaction Charts

The 'Transaction Charts' widget includes the following:

- Active Listings
- Pending Transactions
- Closed Transactions
- Transactions Fell Through

Active Listings

The 'Active Listings' report shows listings and lease-listings that have an active transaction status. Listings must have the following to be included in the chart and report:

- Listing price

Pending Transactions

The 'Pending Transactions' report shows transactions that have a pending transaction status. Pending transactions must have the following to be included in the chart and report:

- Purchase or rental price

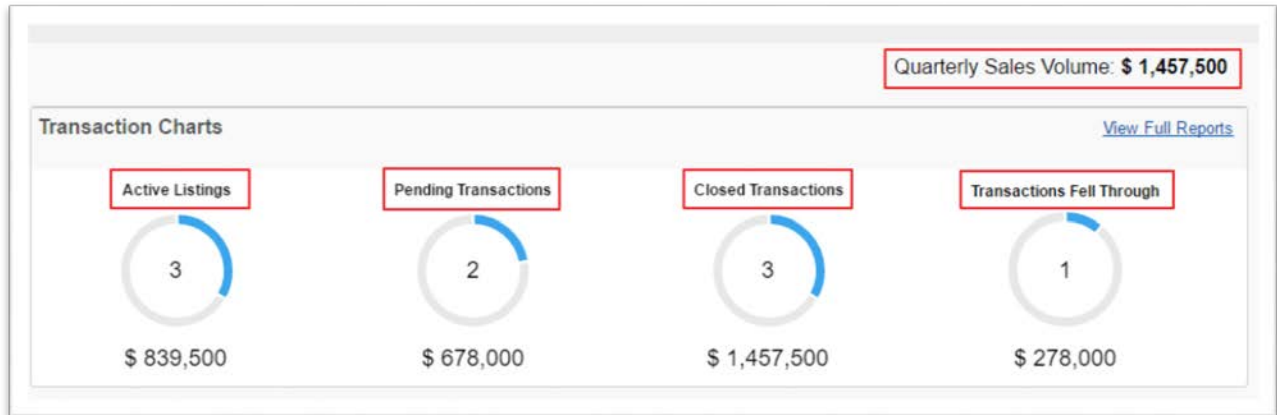
Closed Transactions

The 'Closed Transactions' report shows transactions that were moved to a closed transaction status. Closed transactions must have the following to be included in the chart and report:

- Purchase or rental price
- Closing date

Transactions Fell Through

The 'Transactions Fell Through' report shows transactions that have been moved to the fell through transaction status. You can easily view your performance by referencing the quarterly sales volume metric. This value resets each quarter. A transaction must have a closed status and have purchase price to be included.



Monthly zipTMS™ Tasks

The 'Monthly zipTMS™ Tasks' widget shows checklist tasks that are due and overdue for the current month. A task must have the following to be included in the charts and report:

- Due date

Monthly zipTMS™ Transaction Dates

The 'Monthly zipTMS™ Transaction Dates' widget includes the following reports:

- Listings Expiring
- Transactions Closing
- Retention Removals

Listings Expiring

The 'Listings Expiring' report shows listings that have upcoming listing expiration dates. A listing must have the following information to be included in the report:

- Listing or rental expiration date
- An active or pending transaction status

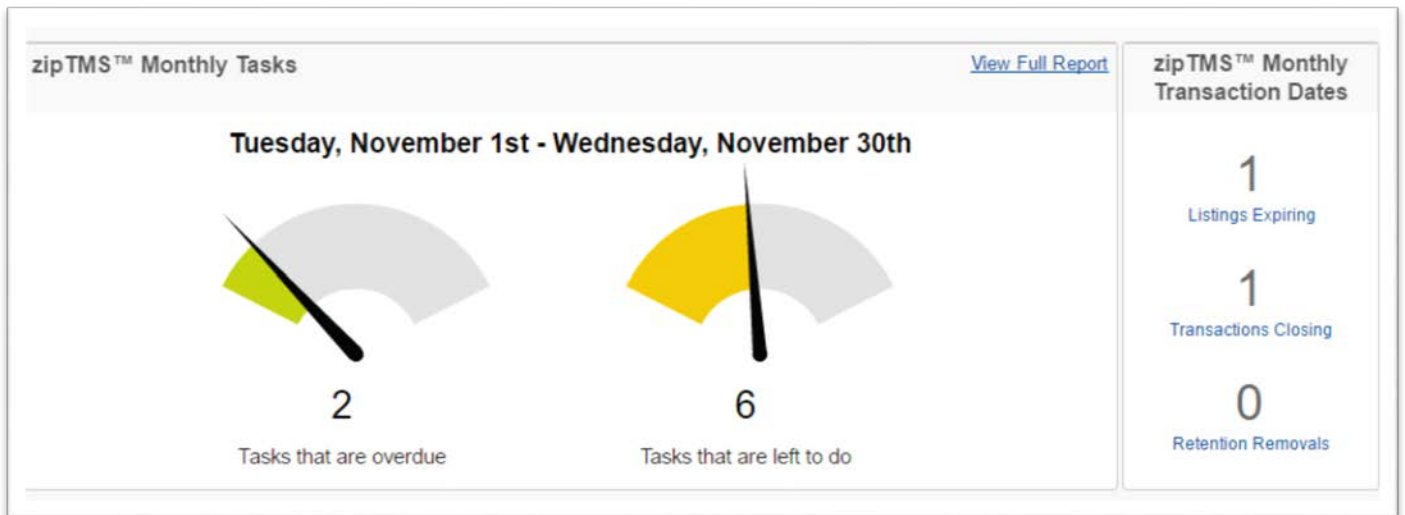
Transactions Closing

The 'Transactions Closing' report shows transactions with upcoming closing dates. A transaction must have the following information to be included in the report:

- Closing date

Retention Removals

The 'Retention Removals' report shows transactions that will be removed from our system according to their retention date.



Recent Transaction Activity

The 'Recent Transaction Activity' widget monitors the following transaction activity for transactions created by you:

- Creating a new transaction
- Deleting a transaction
- Changing a transaction's status
- Requesting document approval
- Requesting transaction approval
- Sending transaction emails
- Adding and removing documents
- Collaboration events
- Documents sent for signatures
- Task activity

You can see documents that need approval by clicking the 'Documents Need Approval' link.

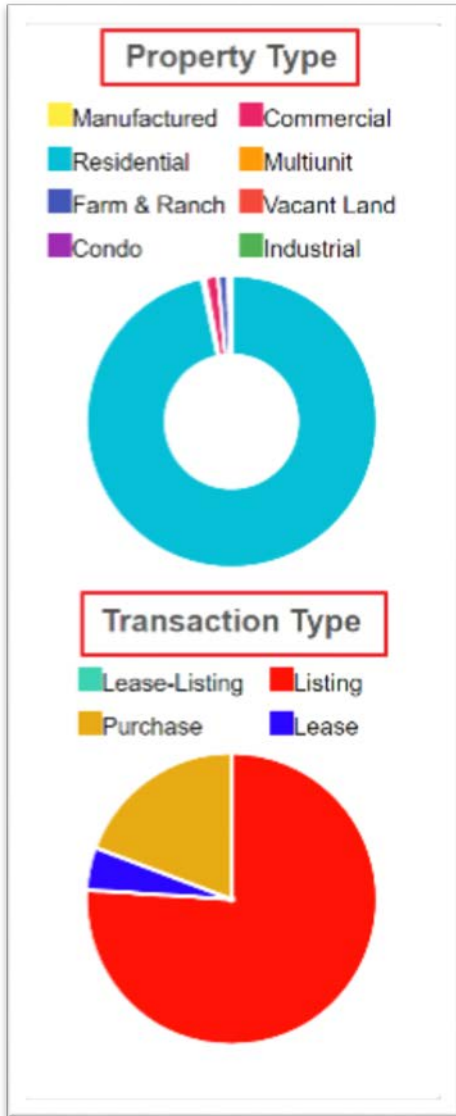
See the E-Signature Packets that are still waiting for signers to sign by clicking the 'E-Signature Packets waiting for signatures' link.

Easily view an activity by clicking on it. View up to 90 days of activity by clicking the 'View More Activities' link.

The screenshot shows a 'Recent Transaction Activity' widget. At the top right is a link 'View More Activities'. Below this are two summary statistics: '2 Documents need approval' and '1 E-Signature Packets waiting for signatures'. The main list contains two entries, each with a user icon, a description, and a timestamp 'Just now'. The first entry is 'Anthony Simon has requested approval for transaction 445 Frankly Road'. The second entry is 'Anthony Simon sent Addendum to Purchase and Sale Contract for signature in transactio...'. Red boxes highlight the summary statistics and the first activity entry.

Recent Transaction Activity		View More Activities
		2 Documents need approval
		1 E-Signature Packets waiting for signatures
	Anthony Simon has requested approval for transaction 445 Frankly Road	Just now
	Anthony Simon sent Addendum to Purchase and Sale Contract for signature in transactio...	Just now

Property and Transaction Type



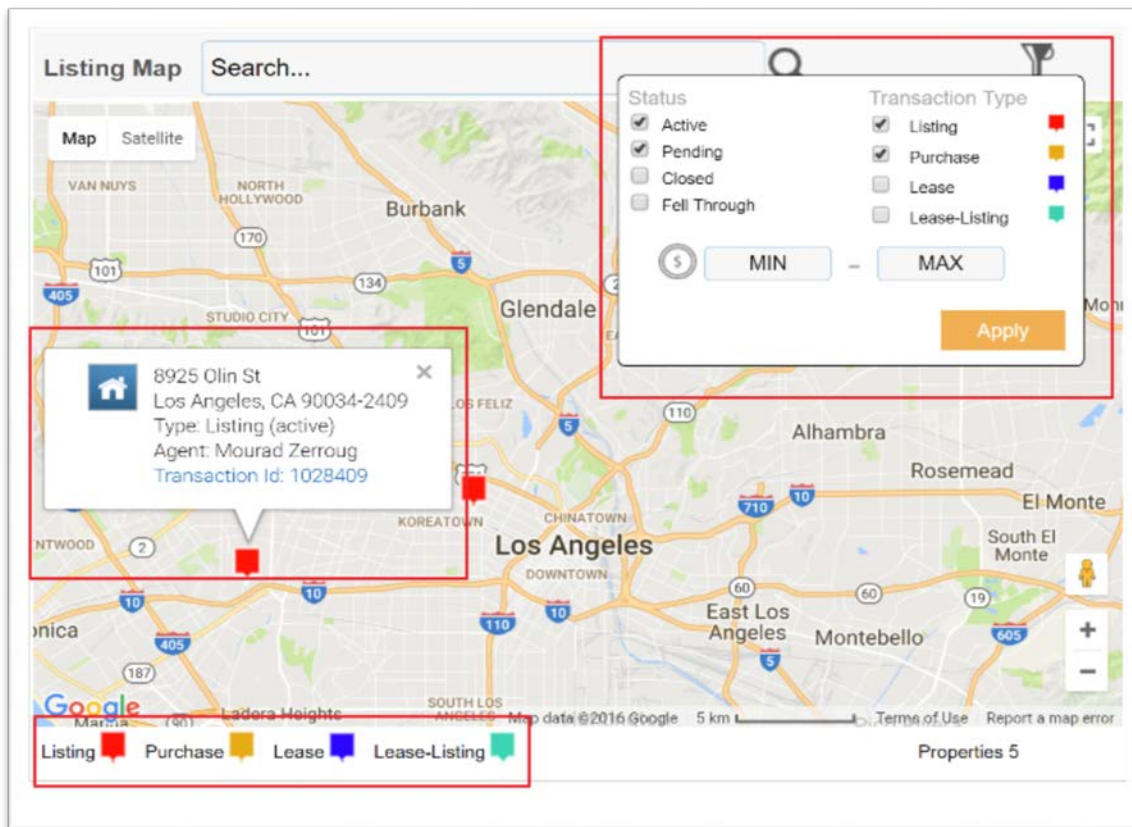
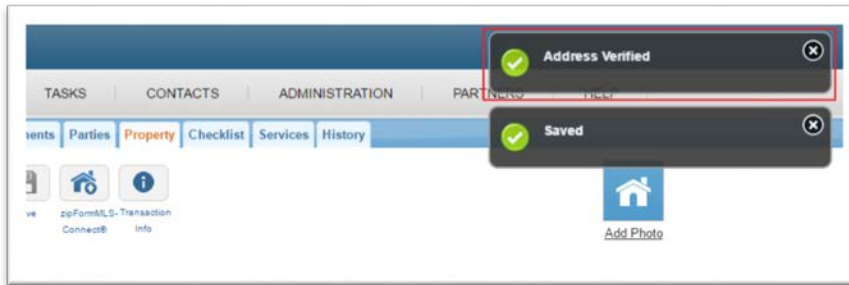
The 'Property and Transaction Type' widget shows a breakdown of all transactions according to their property and transaction type.

Listing Map

The 'Listing Map' plots your transactions on a map. You can filter by transaction types, statuses and also set price ranges. You can click on a transaction that appears on the map to view more information about it.

A transaction needs to have the following information to appear on the map:

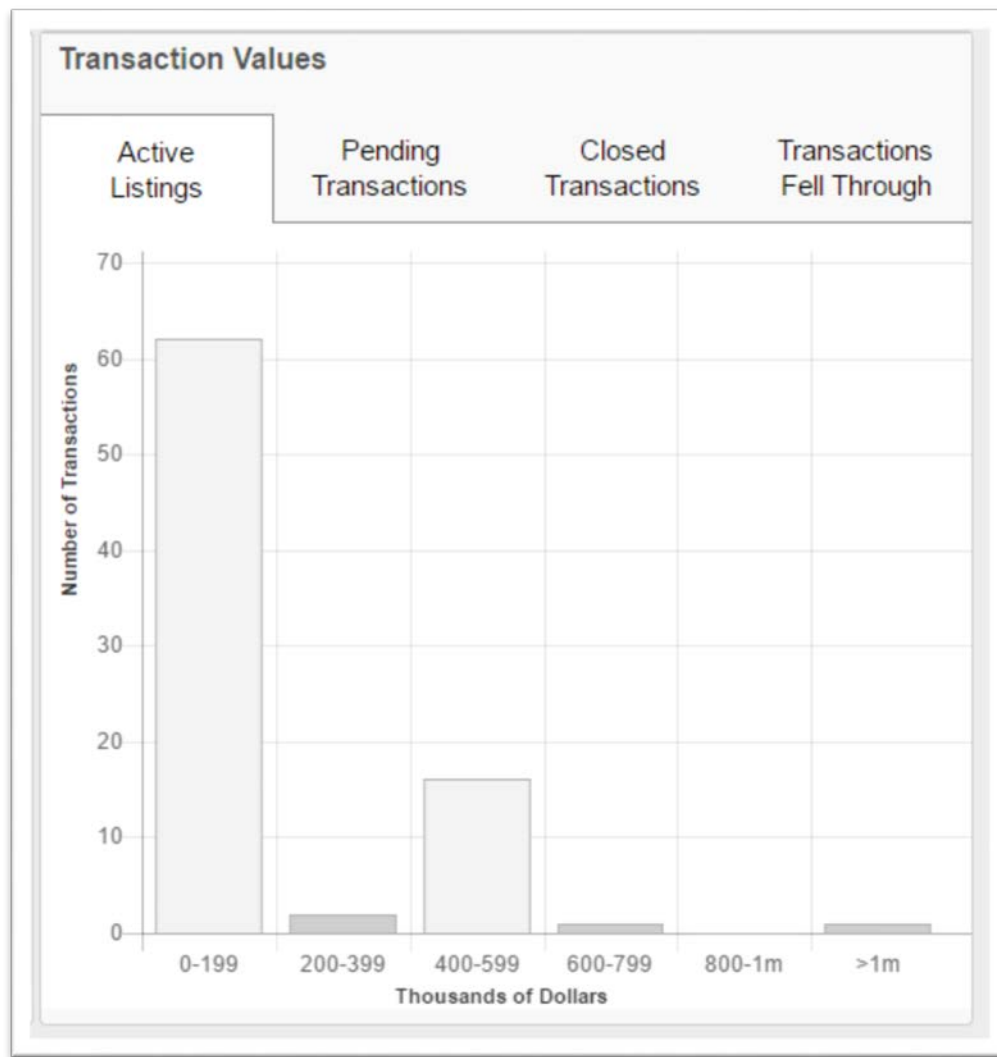
- An address that is verified using SmartyStreets as shown below



Transaction Values

The 'Transaction Values' widget shows the number of transactions that fall into defined price ranges. The widget includes the following transactions:

- Active Listings
 - Listings must have a listing price to be included in the chart
- Pending Transactions
 - Transactions must have a purchase or rental price to be included in the chart
- Closed Transactions
 - Transactions must have a purchase or rental price to be included in the chart
- Transactions Fell Through



Enhanced Reports

Reports can be accessed from the dashboard widgets by clicking on a 'View Full Report' link

The following reports are now available:

- Transactions Reports
 - Active Listings
 - Pending Transactions
 - Closed Transactions
 - Transactions Fell Through
- Activity Reports
 - Documents submitted for approval
 - E-Signature Packets waiting to be signed
- Checklist Reports
 - Tasks
 - Listings Expiring
 - Transaction Closings
 - Retention Removals
- Quarterly Sales Volume Metric

Reports can be sorted by clicking on the column heading. You can select a different timeframe some reports by using the date range selectors and clicking 'Run Report'.

To add filters, follow these steps:

1. Click on the 'Filter' button
2. Select the filters you want to add
3. Click 'Apply' in the filter drop-down
4. Click 'Run Report'

Some reports allow you to navigate to a particular item within a row. Just look for items that appear as links.

Totals are displayed at the bottom of reports and update when a new report is run. Also, you can export a report as a CSV by clicking on the 'Export as CSV' button.

Reports

Closed Transactions | 11/01/2016 | 12/03/2016 | Filter | Run Report

Agent	Transaction Name	Address	Date	Listing Expirati...	Closing Date	Listing Price	Purchase Price
Anthony Simon	9596 Woodbridge				Wed Nov 23 2016		\$ 342,500
Anthony Simon	7888 Woodward Ave				Thu Nov 10 2016		\$ 583,000
Anthony Simon	77 Sesame Street				Thu Nov 17 2016		\$ 532,000

Filter By Status

- Active
- Pending
- Closed
- Fell Through

Filter by Transaction Type

- Listing
- Purchase
- Lease
- Lease-Listing

Filter by Property Type

- Residential
- Commercial
- Industrial
- Vacant Land
- Multi Unit
- Farm And Ranch
- Condominium
- Manufactured Home

Apply

Total Count: 3 | Listing Total 0 | Purchase Total \$ 1,457,500

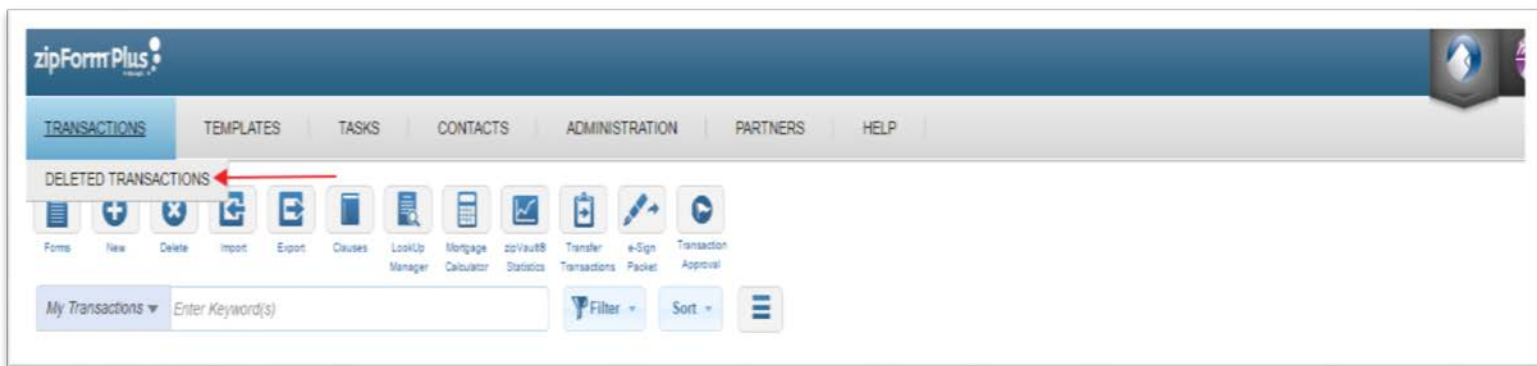
Export as CSV | Close

Retention Policy

Transactions will now be retained within our system according to their retention date. Unless a retention date is manually overridden or requested by your brokerage, we use the retention guidelines set by the real estate department.

You will receive an email notification and an in-app notification on the 1st of each month if there are transactions that have retention periods expiring that month.

You can export these transactions for your records by visiting the 'Deleted TRANSACTIONS' page.



On the 'DELETED TRANSACTIONS' page, you can see the transactions that will be deleted in the next 30 days. You can also see transactions that have been deleted in the past 30 days. The 'Recently Deleted Transactions' section includes transactions that were deleted because their retention date passed and transactions that were manually deleted by a user. All transactions on this page can be exported by selecting the 'Export' link.

TRANSACTIONS | TEMPLATES | TASKS | CONTACTS | ADMINISTRATION | PARTNERS | HELP

william briggsb

All Offices | Enter Keyword(s) | Search for a transaction by user or the transaction name

Upcoming Retention Removals | See transactions that will be removed from our system in the next 30 days

Agent Name	Transaction Name	Prop Address	Retention Date	Notes
Anthony Simon	445 Frankly Road	No Address	12/06/2016	This transaction will be deleted in 7 days because its Retention Date set by Anthony Export

Recently Deleted Transactions | See recently deleted transactions. Includes both user deleted transactions and transactions that have passed their retention date

Agent Name	Transaction Name	Prop Address	Retention Date	Notes
Anthony Simon	1234 Main Street		11/28/2016	Anthony Simon deleted this transaction: 1234 Main Street Export

Retention Rules by State

State	Number of Years	Number of Months
VERMONT	7	84
COLORADO	4	48
MAINE	3	36
NEW HAMPSHIRE	3	36
DELAWARE	3	36
MASSACHUSETTS	7	84
WEST VIRGINIA	5	60
WYOMING	7	84
MICHIGAN	5	60
OKLAHOMA	7	84
TEXAS	5	60
INDIANA	5	60
WISCONSIN	5	60



MINNESOTA	7	84
CALIFORNIA	5	60
PENNSYLVANIA	7	84
DISTRICT OF COLUMBIA	3	36
MARYLAND	5	60
WASHINGTON	3	36
ARIZONA	5	60
NEW MEXICO	6	72
HAWAII	3	36
RHODE ISLAND	3	36
SOUTH CAROLINA	6	72
IDAHO	3	36
IOWA	5	60
NORTH DAKOTA	6	72
SOUTH DAKOTA	4	48
UTAH	3	36
ILLINOIS	5	60
KANSAS	3	36
FLORIDA	5	60
GEORGIA	3	36
ALABAMA	6	72
ARKANSAS	3	36



MISSISSIPPI	3	36
MISSOURI	5	60
LOUISIANA	5	60
NEVADA	6	72
NEW YORK STATE	7	84
NORTH CAROLINA	3	36
OHIO	3	36
KENTUCKY	5	60
NEBRASKA	5	60
TENNESSEE	3	36
VIRGINIA	3	36
OREGON	5	60
MONTANA	5	60
NEW JERSEY	4	48
ALASKA	3	36
PUERTO RICO	7	84
VIRGIN ISLANDS	7	84
CONNECTICUT	7	84
GUAM	7	84

