

# zipForm® Plus Release Notes

Release Date: 01/31/2018

This document outlines the updates that are included in the 01/31/2018 release. You can access additional help content and videos that pertain to the items in the release by visiting the link below.

- <http://www.ziplogix.com/support>

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# zipCRM™


zipCRM™ is currently available for all users to purchase on their own. zipCRM™ is a fully functional CRM that integrates with the existing zipForm® Plus platform. Version 1 of the integration supports the following functionality:

- Ability to export a contact/party to zipCRM™
- Ability to import (limited) a contact/party from zipCRM™
- Ability to manage a contact in zipCRM™


### Transaction Party

[Import](#) [Add Contact](#) [Import from zipCRM™](#) [Manage in zipCRM™](#)

Save As contact  
 Save As zipCRM™



### Contact



[Add Photo](#)

**Category** RE/MAX Agents [Manage in zipCRM™](#)

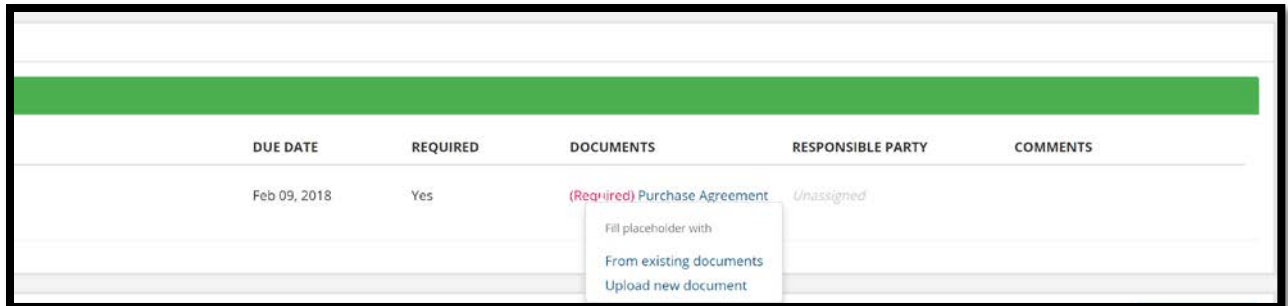
**Transaction Role** Title Company

Role	Title Company	Street Address	
<b>Officer Name</b>	John Doe	<b>City</b>	Santa Clarita
<b>Email</b>	DoeJohn@gmail.com	<b>State</b>	
<b>Company Name</b>	zipTitle	<b>Zip Code</b>	91381
<b>Cell Phone</b>			
<b>Phone</b>			
<b>Fax</b>			

[Export To zipCRM™](#) [Close](#) [Edit](#)

## Placeholder/Checklist Enhancements

- A placeholder can now be filled from the checklist or from the global task screen
- Making a document or placeholder as required is reflected in the task and task attachment and vice versa i.e. the required attribute is now synced between documents on the document list screen, the transaction checklist and the global checklist



The screenshot shows a table with the following columns: DUE DATE, REQUIRED, DOCUMENTS, RESPONSIBLE PARTY, and COMMENTS. A row is visible with the following data: DUE DATE: Feb 09, 2018; REQUIRED: Yes; DOCUMENTS: (Required) Purchase Agreement; RESPONSIBLE PARTY: Unassigned. A dropdown menu is open over the 'DOCUMENTS' cell, showing three options: 'Fill placeholder with', 'From existing documents', and 'Upload new document'.

DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	COMMENTS
Feb 09, 2018	Yes	(Required) Purchase Agreement	Unassigned	


# Lending Company

You can now add a lender to your transaction parties. Similar to other transaction parties the information entered will flow to applicable global fields. Contacts also supports “Lending Company” as a transaction role.

Transaction Party

[Import](#) [Add Contact](#) [Import from zipCRM™](#) [Manage in zipCRM™](#)

Save As contact  
 Save As zipCRM™

 [Remove](#)

**Role**  **Street Address**

**Officer Name**  **City**

**Email**  **State**

**Company Name**  **Zip Code**

**Cell phone**

**Phone**

**Business Fax**

**Mortgage Type**

Conv.  FHA  
 FMHA  VA  
 Other

## Miscellaneous

- New partner: HomeActions
- Broker Skins
- UI Enhancements:
  - Auto-focus on fields
  - Tooltips added to icons without labels
  - Removed 'not applicable' tasks from urgent tasks
  - Redesigned signature packet for quick access to signer status
  - Locating signature packet screen