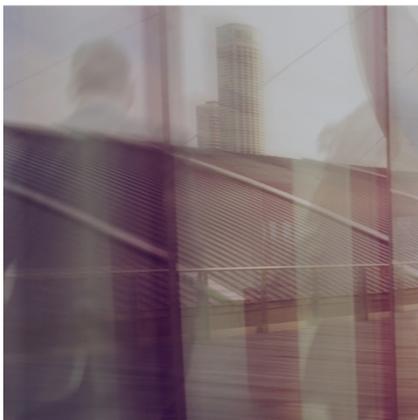# zipForm® Plus

RELEASE NOTES

What's New April 8, 2020

LONE WOLF
TECHNOLOGIES

lwolf.com
1.866.CRY.WOLF(279.9653)

This document outlines the updates that are included in the 4/8/2020 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

Contents

Usability Enhancements

Lone Wolf Link Compatibility with the new Transaction Summary

The Lone Wolf Link integration is now compatible with the updated version of the transaction summary. To make the switch, navigate to a transaction and click "click here" on the information ribbon at the top of the summary screen.

We have a simplified new layout for your transaction summary that will auto-save your changes and help you keep track of items that need your attention. Click here to try it.

To learn more about the updated Transaction Summary screen, click here.

Assign a Responsible Party to a Document Task

When working inside of a transaction, you can now assign a responsible party to any document with a due date. This allows assignees to receive due date reminders, working seamlessly with to-do tasks. To add a responsible party, navigate to the Document Task in the Checklist tab of the transaction. Then you can choose an assignee from the Responsible Party dropdown.

NOTE: the task will be in a checklist labeled "Document/Transaction Checklist"

Document/Transaction Checklist   + New Category

Documents - Category

⊕ Create a new placeholder

	STATUS	TASK NAME	DUE DATE	REQUIRED	DOCUMENTS	RESPONSIBLE PARTY	DESCRIPTION
✓	Not started ⇕	Addendum No #1 - 12/15 ⤷ Submit for review	Apr 17, 2020	Yes	Addendum No #1 - 12/15	Listing Agent	
✓	Not started ⇕	Addendum No #2 - 12/15 ⤷ Submit for review	⚠ Apr 04, 2020	Yes	Addendum No #2 - 12/15	*Unassigned*	

Improvement to "Move" Menu Action

When moving a document to a different folder, the name of the folder that you are currently in appears at the top of the modal dialog screen. This makes it easier to keep track of where you are within the folder structure.

Clicking the "Move Here" button will move it to the folder whose name appears at the top. If you see "Transaction Documents", that just means that you are in the main documents area (root folder) inside of a transaction, and not in a sub-folder.
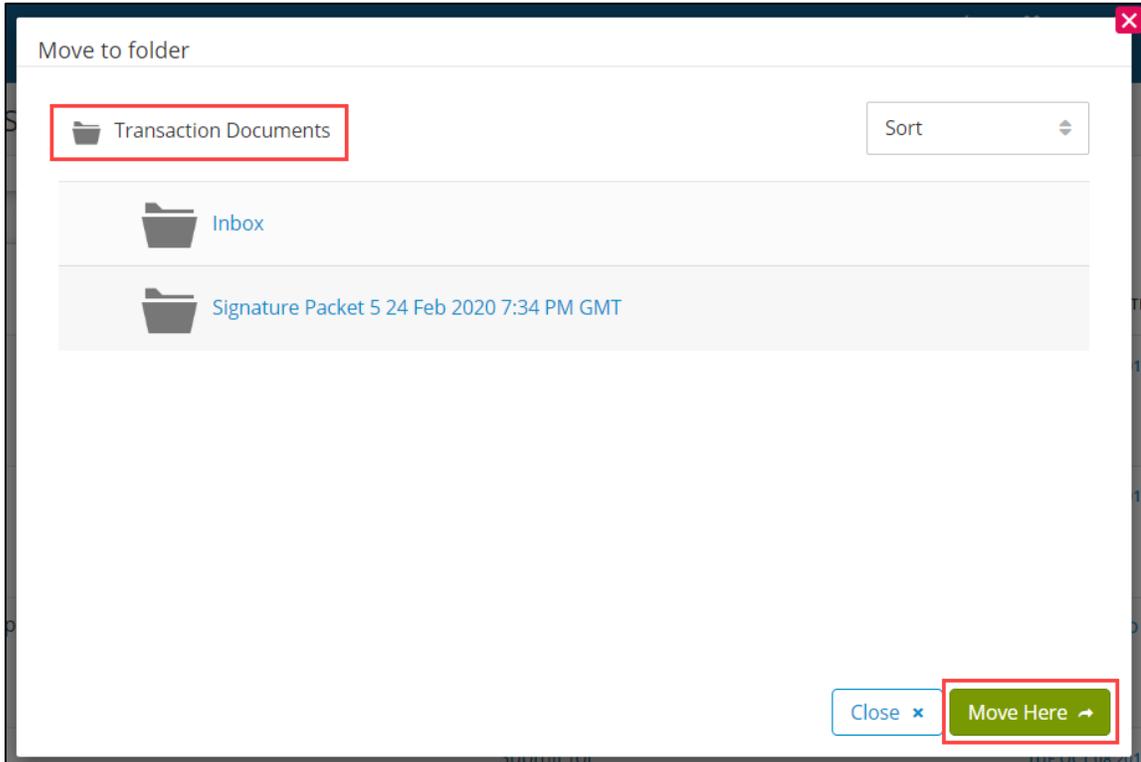
View Transaction Coordinator(s) Assigned to Agent

Brokerage users can now view which Transaction Coordinators (TCs) are associated with each agent. This makes it easy to see and keep track of who has access to whose transactions.

Inside of a transaction that you have permission to view, you will now see a list of TCs below the transaction owner's name.

If you are a Broker Admin, when viewing a user from *Admin > Users* list, you will now see the list of TCs assigned to the user, just below their name.
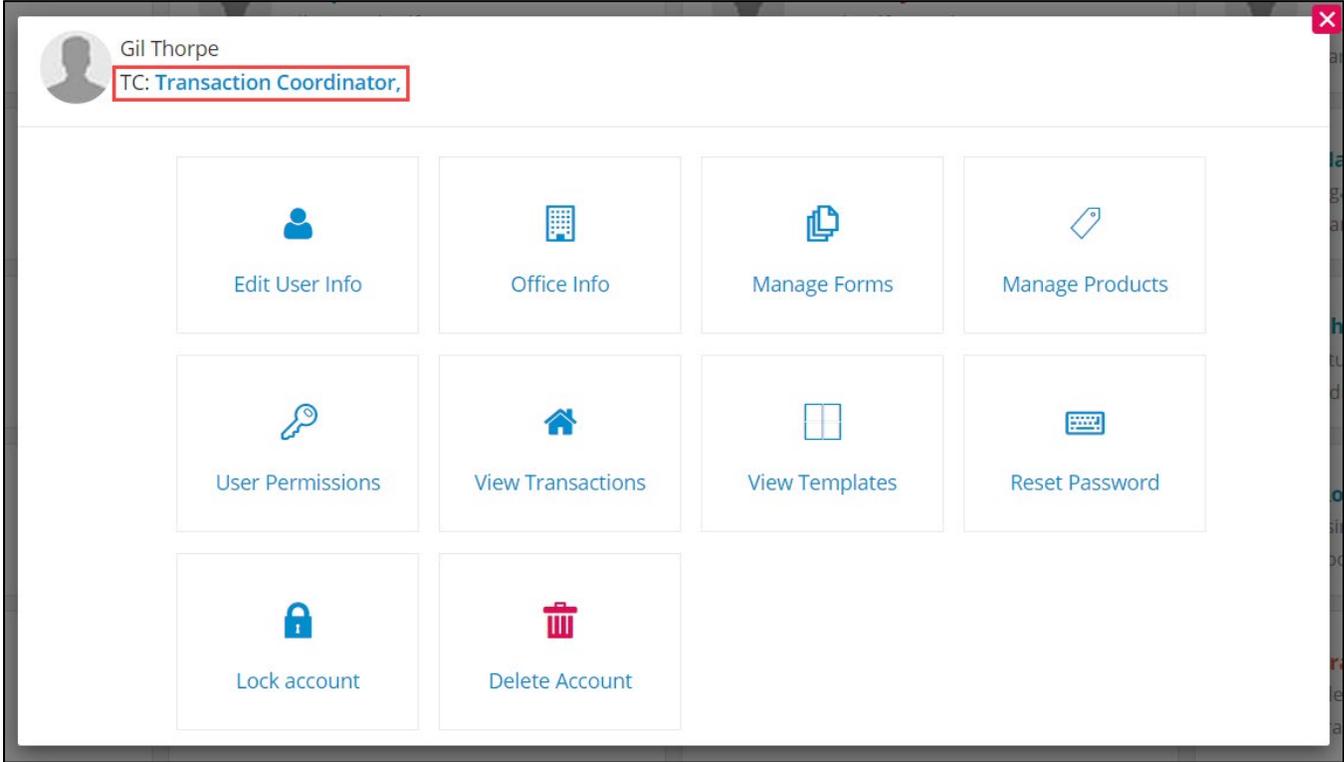
Security Enhancements

Secure Code to Reset Password

For additional security, you will now use a secure code to reset your password. To perform a password reset, you must have access to the e-mail account listed under your profile settings, and enter the secure code within 10 minutes of requesting the reset.

If you need to reset your password for any reason, simply click "Forgot Password" on the zipForm® Plus login screen.
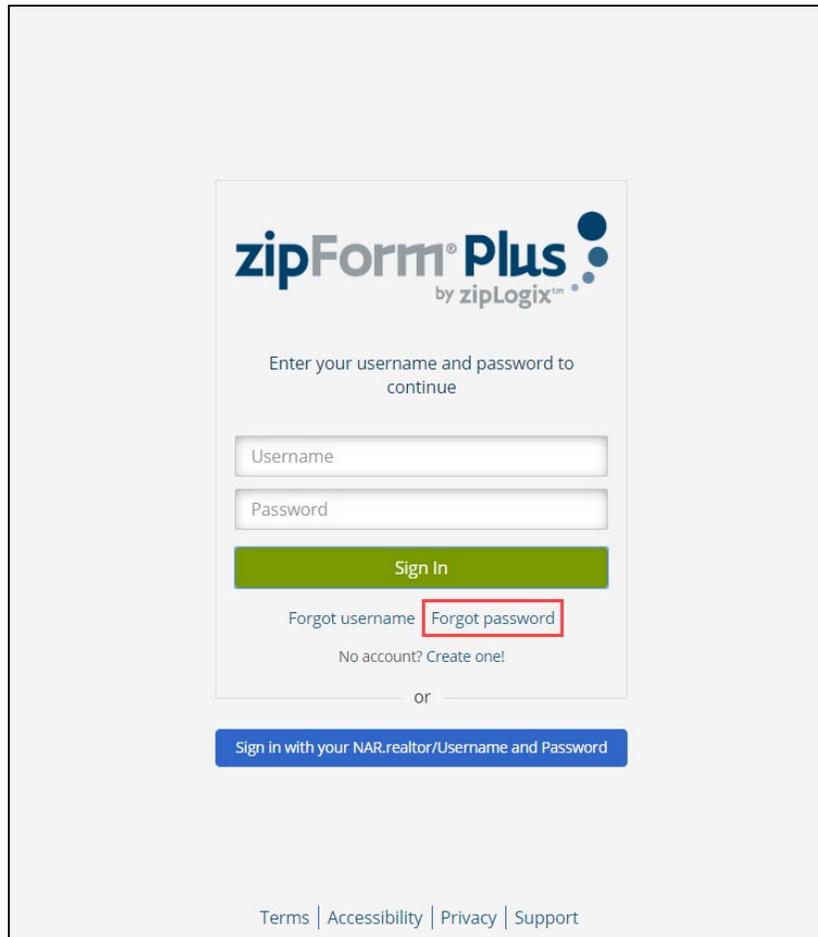
You will then be prompted to enter the username that you wish to reset the password for.
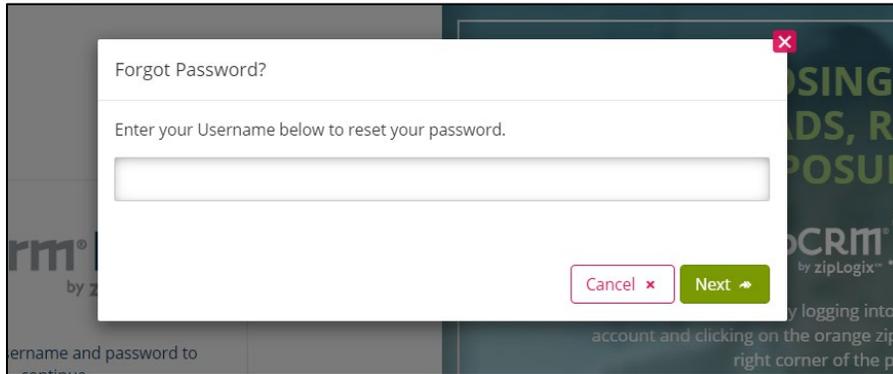
You can choose how you would like to receive the security code. If you have not added a mobile phone number to the security information in your profile settings, you will only be able to use e-mail for authentication.
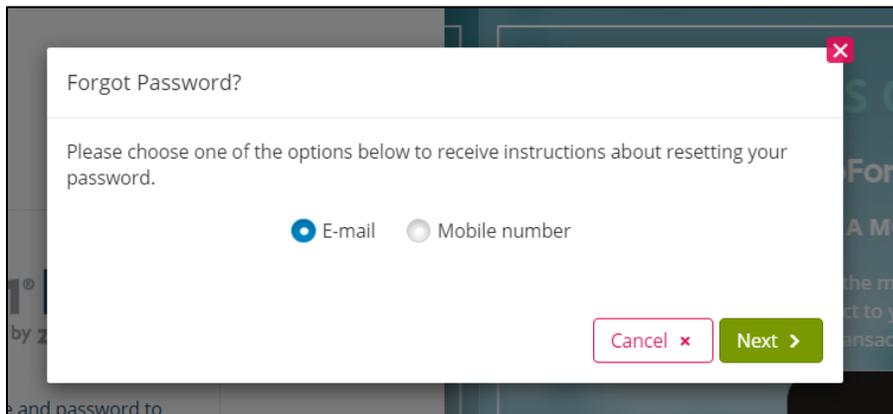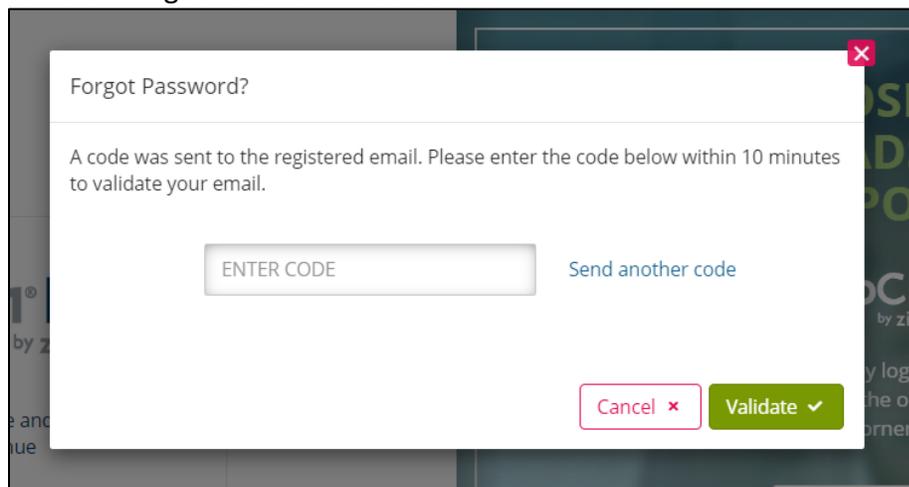

You will receive a 5-digit 2-factor authentication code, which you must then copy and paste or type into the text box on the "Forgot Password?" screen within the next 10 minutes.
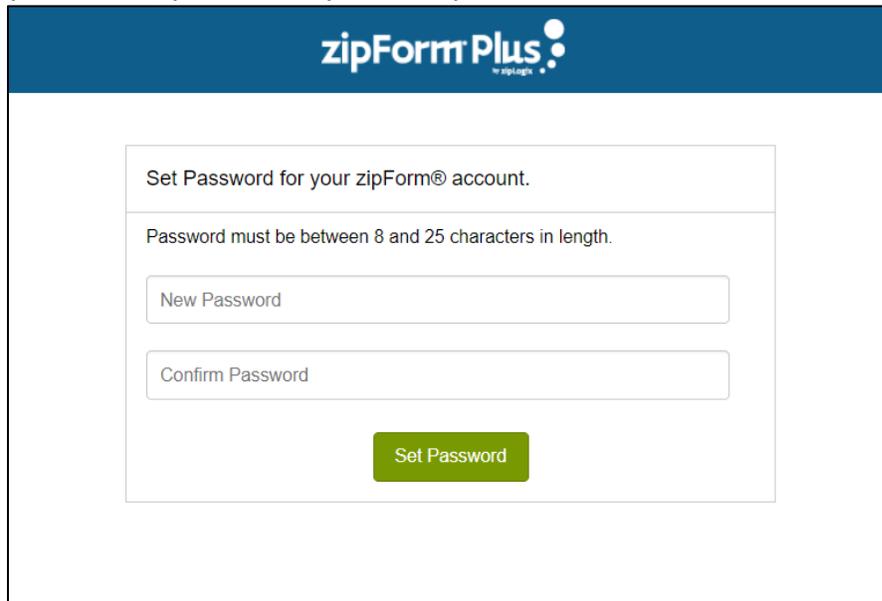
Once your identity is verified, you can set your new password.

If you would like to add your mobile phone number to receive 2-factor authentication codes via text, navigate to Me at the top right of the application, and then Profile & Settings > Sign In & Security > Security and Account Recovery Information. Click "Add Mobile #" and follow the on-screen prompts.

Compliance Updates

The CCPA, otherwise known as the California Consumer Privacy Act, is a new legislation introduced in the state of California. It is designed to give consumers total control over their personal data and how it's used in a business setting.

It means that any resident of California has the right to know how their personal information—names, email addresses, phone numbers, property addresses, and so on—are used by businesses. It also means that they have the right to refuse the sale of their information.

Ultimately, the CCPA is going to change how you collect and maintain information about your clients. And, as your Transaction Management Solution, we're going to make sure our technology does everything possible to help you stay compliant with the new law.

To help you stay compliant with the new regulations, we're taking steps both in our own products and with our partners to protect personal data and promote transparency, including:

- A new database for consumers who opt out of the sale of their information
- A no-questions-asked policy for clients who want to opt out
- New opt-out links to make it easy for consumers to find
- In-product notifications whenever the CCPA applies to a transaction
- A reporting process for any requests you get from clients

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