

# RELEASE 3.4 SP1



## Zip 3.4 SP 1 Release Notes

The feature updates and enhancements may be subject to change based on testing, development, and other factors that occur before the release date.

### Enhanced Subscription Management

Effective July 1, 2025, in accordance with California Assembly Bill 2863, Zip has introduced enhanced subscription management capabilities for Zip admins. This update ensures compliance with new consumer protection requirements related to automatic renewal and continuous service agreements.

#### Key Updates

##### Unsubscribe Functionality

- Zip admins can now unsubscribe from services directly from the same interface used to subscribe—via calyxsoftware.com. This applies to both Zip for Point and Zenly services.

##### Service Deactivation Timing

- Zip for Point: Access is terminated immediately upon unsubscribing.
- Zenly: Access remains active until the end of the current billing cycle.

##### User Guidance

- Clear and informative messaging is provided throughout the unsubscribe process. This includes:
  - A summary of the implications of unsubscribing.
  - Contact information for support and further assistance.

These changes are designed to provide transparency and ease of use, aligning with AB 2863's mandate that consumers must be able to cancel services through the same method used to enroll

Each service can be accessed via the following links. Look for the **Unsubscribe** link on each signup page (**highlighted in red in each screenshot**).



- [Zenly | Mortgage Brokers Cloud-based Loan Origination Software](#)

### Zenly: Mobile-First POS & Mortgage Platform

Calyx provides an easy-to-use platform for loan originators, brokers, and bankers. Zenly simplifies lead management, document handling, and loan submissions. It integrates with Fannie Mae DO and Freddie Mac LPA to streamline your workflow and save time.

[Watch a Demo](#)

[Subscribe Today](#)



[Have more questions? Check out our Zenly FAQ](#)

[Need to cancel Zenly? Unsubscribe](#)

- [Point of Sale \(Zip\) | Most Affordable, Easy to Use Borrower Interview](#)

### Engaging your borrowers on the go

Calyx brings a simple to setup, customizable POS with no contract or exorbitant fees. Our POS solution is designed to be easy to use by applicants and affordable for businesses of all sizes. With our no-contract pricing, you'll never have to worry about hidden fees or unexpected charges. No setup cost and immediately available with every Point User subscription.

**Just \$3/Application and  
\$1.50 per transaction/package for eSign**

**(No setup or monthly software license fee)**

[Subscribe Now](#)



[Need to cancel Point of Sale? Unsubscribe](#)

[Point | Easy-to-Use Platform - Close More Loans Faster](#)

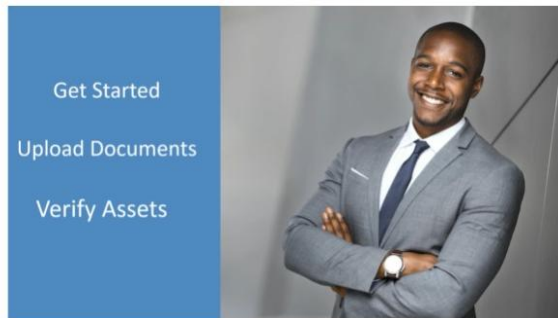


## Point of Sale

Calyx brings a simple to setup, customizable POS with no contract or exorbitant fees. Our POS solution is designed to be easy to use by applicants and affordable for businesses of all sizes. With our no-contract pricing, you'll never have to worry about hidden fees or unexpected charges. No setup cost, and immediately available with every Point User subscription.

[Learn More](#)[Set Up](#)

Need to cancel Point of Sale? [Unsubscribe](#)



## Zip Management Site

### Billing Report > Usage Report

- Added **Zenly Grandfather Amount**, which allows the pricing to remain the same for all all existing Zenly accounts.
  - All new accounts will be applied with **Zenly Charge Amount**.
  - All new Zenly accounts are set at \$45 per seat.

### Zip Management

- Order Site
- Search Site
- SearchEmailLogs
- User News
- Sales Report
- Billing Report**
- eSign Usage Report (WebCaster)
- Deleted Sites List
- Access IPs
- Account Consolidation

### Usage Report

#### Usage Report

Loan Charge Amount	\$ 3.00	<a href="#">Save</a>
eSign Charge Amount (per file)	\$ 3.00	<a href="#">Save</a>
eSign Charge Amount (per package)	\$ 1.50	<a href="#">Save</a>
Zenly Charge Amount	\$ 41	<a href="#">Save</a>
Zenly Grandfather Amount	\$ 31	<a href="#">Save</a>

#### Reports

Report	Usage Download	Initial Fee Download
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### Edit Site: Site Information

- Added notes for when admin users unsubscribes.
- Synchronized the **Ref. Account ID** and **Sales Rep** of admin users with all users under the same account.



## Zip Admin Site

### Notifications > Email Setting > Email Address

- For Zenly only, the *Primary Email Address* > *Email* field has been disabled.

## Borrower Interview

### Global

- All **Country** dropdowns have been defaulted to United States as the first option.

### Loan Summary PDF

- Added the **Secondary Employment**, **Gifts and Grants**, and **Military Status** sections.

## eSign

### Path and Zenly

- Added the ability to eSign for more than 3 borrowers at a time.

## APIs

- New GET API email signature is available for each LOS from Zip.