

# RELEASE 3.3



## Zip 3.3 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.

### Zip Admin Site

#### [Borrower Interview > Configuration > Edit Configuration](#)

- Added the ability to configure/edit the Loan Term.

A screenshot of the 'Edit Loan Term' configuration modal in the Zip Admin Site. The modal is titled 'Edit Loan Term' and has a close button (X) in the top right corner. Below the title, there is a subtitle 'Add and organize the list options.' and an 'Add Option' button. The main content area contains a list of loan terms, each with a checkbox, the term text, and two icons (a menu icon and a trash icon). The terms are: 5 years, 10 years, 15 years, 20 years, 25 years, 30 years, and 40 years. All checkboxes are checked. Below the list is a 'Load Default' button. At the bottom of the modal are two large buttons: 'Cancel' and 'Save'. A red box highlights the 'Loan Term' and 'Edit' buttons in the top navigation bar of the modal.

#### [Notifications > Edit Reminders > Incomplete Loan Interview Reminder](#)

- Added the Alert Loan Originator checkbox, which notifies LOs when emails are sent to borrowers about incomplete loan interviews.



Document/eSign Request Reminder

Incomplete Loan Interview Reminder

### Use Loan Interview Reminder

By selecting On, borrowers (who have not completed the interview) will receive emails/texts reminding the interviews. Selecting Off disables this feature.

Use Reminder

☒ On

☐ Off

☐ Alert Loan Originator

## Company Site > Company Main

- Added the ability to put Logos on the Company Main site, same as Borrower Portal > Default Information.

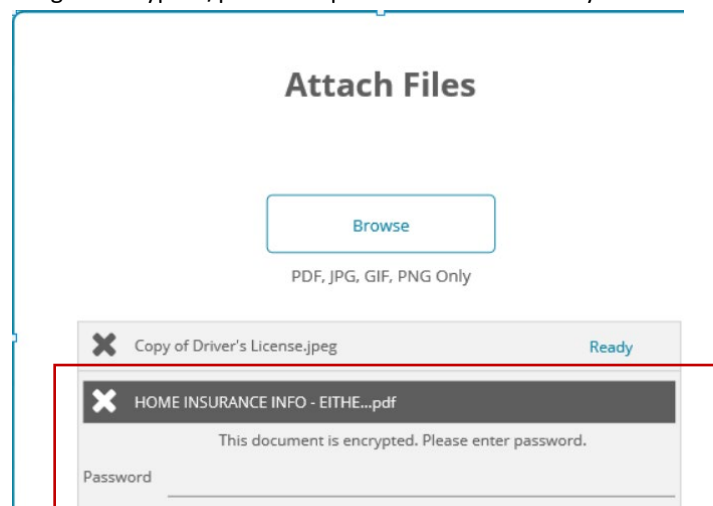


## General

- Updated social media icons for X (formerly Twitter), Reddit, Snapchat, and Telegram.
- Updated the vendor's name FormFree to Informative Research.

## Borrower Dashboard

- Update Zip UI to closer resemble Zenly UI.
- Updated Loan Number field to reflect subject property address when applicable.
- Enabled the uploading of encrypted/password-protected documents by borrowers.





## Borrower Interview

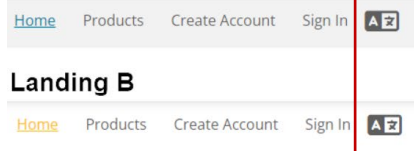
- Added opt-in and opt-out checkboxes for receiving emails and text messages.
- Added the County field for subject property address.
- Added the Country field for the previous addresses of the borrower and coborrower.
- Added Primary Residence for current and intended occupancies.
- Expanded the number of assets that can be collected to 15 on the Financial page/section.
  - This is also reflected in the Loan Summary.
- Added TCPA statement with agree-to-share option on the Contact page/section.
- Updated the autofill function for borrowers who have previously completed loan interviews and are starting new loan interviews, where numerous fields in the new interview will be pre-populated with borrowers' information if the data stored is still within retention policy period.
- Updated the font to comply with ADA guidelines.

## General Updates and Enhancements

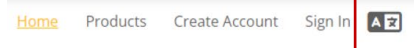
### Global UI

- Updated the language selection icon for Zip Admin, borrower landing page, and borrower dashboard.

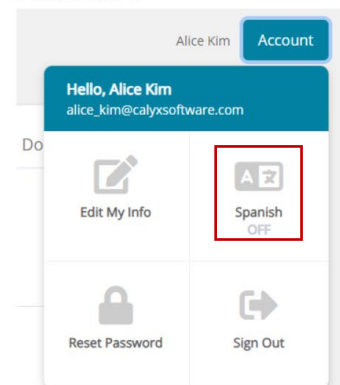
#### Landing A



#### Landing B



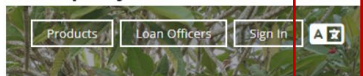
#### Dashboard



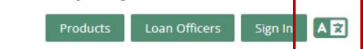
#### Company Main A



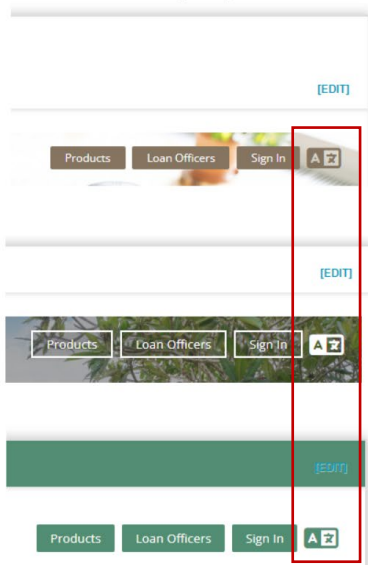
#### Company Main B



#### Company Main C



#### Admin - Company Main



### Email Notification

- Updated the Lead Invite email for Zenly and Path to include a memo from the LO.