

Release Notes

v5.17.0 Release

Production Release Date: 7/13/2023

New Features

[PEP-6538] - Added the ability to allow listing and updating participant and task workflow actions via new Rest and Soap API endpoints. Please see the new API calls below and additional information in the developers guide.

<https://developers.alphatrust.com/documentation/code-samples/workflow-actions.html>

- GetTaskWorkflowActionsUpdateable()
- UpdateTaskWorkflowAction()
- GetParticipantWorkflowActionsUpdateable()
- UpdateParticipantWorkflowActions()

[PEP-5550] - Added the ability to send a One-Time Passcode to signing Participants in an email. *Mobile* Authentication has been renamed to *One-Time Passcode*. Please see the image below for more details.

The screenshot shows the 'Edit Participant Details' window with the 'Authentication' tab selected. The 'Type' dropdown is set to 'One-Time Passcode'. The 'Send As' dropdown is set to 'Email'. The 'Passcode length' is set to 4. There is an unchecked checkbox for 'Use two-factor authentication.' The left sidebar lists various configuration categories: Basic Information, Authentication (selected), User Experience, Email Customization, Reminders, Completed Notifications, Workflow Actions, Workflow Rules, Event Subscriptions, Placeholders, PDF Fields, Launch Rules, Launch Display, Launch Domain Restrictions, and Launch Labels. At the bottom of the window are three buttons: 'Save as Preset', 'Cancel', and 'Update Participant'.

[PEP-5424] - Added the ability to use placeholders for emails within Event Subscriptions. The new placeholders and Event Subscription settings referenced can be seen below. Also, please see the example image below using the Participant emails address index placeholder.

- {{LAUNCHER_EMAILADDRESS}} - The email of the user who made the transaction
- {{PARTICIPANT_EMAILADDRESS:[Index]}} - The email of the participant at [Index], this index starts at 1
- {{PARTICIPANT_EMAILADDRESS:[Role]}} - The email of the participant who has the [Role] as their role, this index starts at 1

Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Event Subscriptions

Subscription 1 Delete

Type:

Status Changed Event

☐ Webhook

☒ Email

☐ SMS

Email Address:

{{PARTICIPANT_EMAILADDRESS:1}}

Add Event Subscription

☐ Show Advanced

Save as Preset

Cancel

Update Workflow

Improvements

[PEP-6901] - Improved the Quick Stats page by adding links to the Color Status blocks. The links will navigate the user to the Status page with the filter of the Color Status block selected. Please see the example image below for more details.

MyCompany Inc.

Dashboard Reports Workflow Designer Account Developers

dashboard / quick stats

Quick Stats Workflow Templates Pending Signatures

This Year

Group Transactions

All Groups

Send Document for e-Signature

1 completed

0 pending

0/0 cancelled/closed

6/0 expired/voided

Recently Created Transactions

Transaction ID	Description	Group	Status
1000251832	Simple Test	My Company Internal	Completed
1000251831	Simple Test	My Company Internal	Pending

Recently Updated Workflows Templates

Workflow Template Launch	Options
Sample Workflow	
Complex Workflow	

MyCompany Inc.

Dashboard Reports Workflow Designer Account Developers

reports / status

Status Trends Completion Rates Verify Document

Advanced Search

Export Options Advanced

Search For

Transactions

Search Text

Search by Transaction ID or description...

Status

Complete

Transaction Creator

Group Transactions

Date Range

2023-01-01 ~ 2023-06-23

Date Type

Created

Search Location

All Groups

Test Transactions

Exclude Tests

Search

Reset Filters

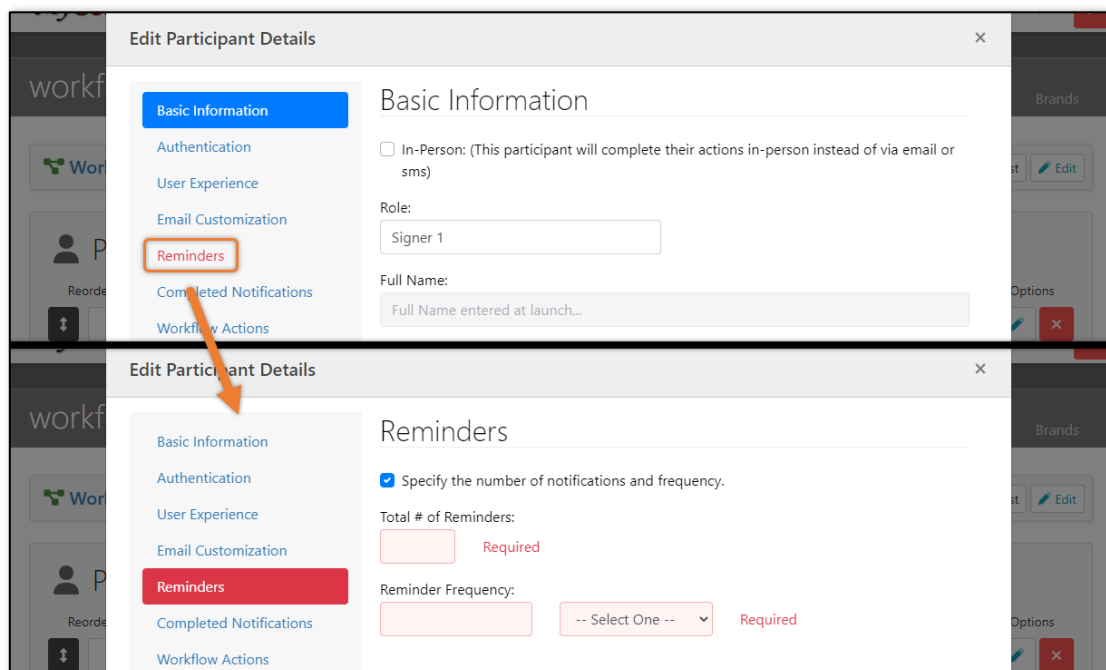
Transaction ID	Description	Group	Created Date	Status	Closed Date	Options
1000251832	Simple Test	My Company Internal	2023-01-03 09:12 PM UTC	Completed	2023-01-03 09:13 PM UTC	

Release Notes

[PEP-6643] - Improved and added new functionality to the Tasks Editor. Users can select multiple fields by dragging the mouse and adjust alignment and sizing when you have multiple fields selected. Please see an example of the new functionality in the image below.

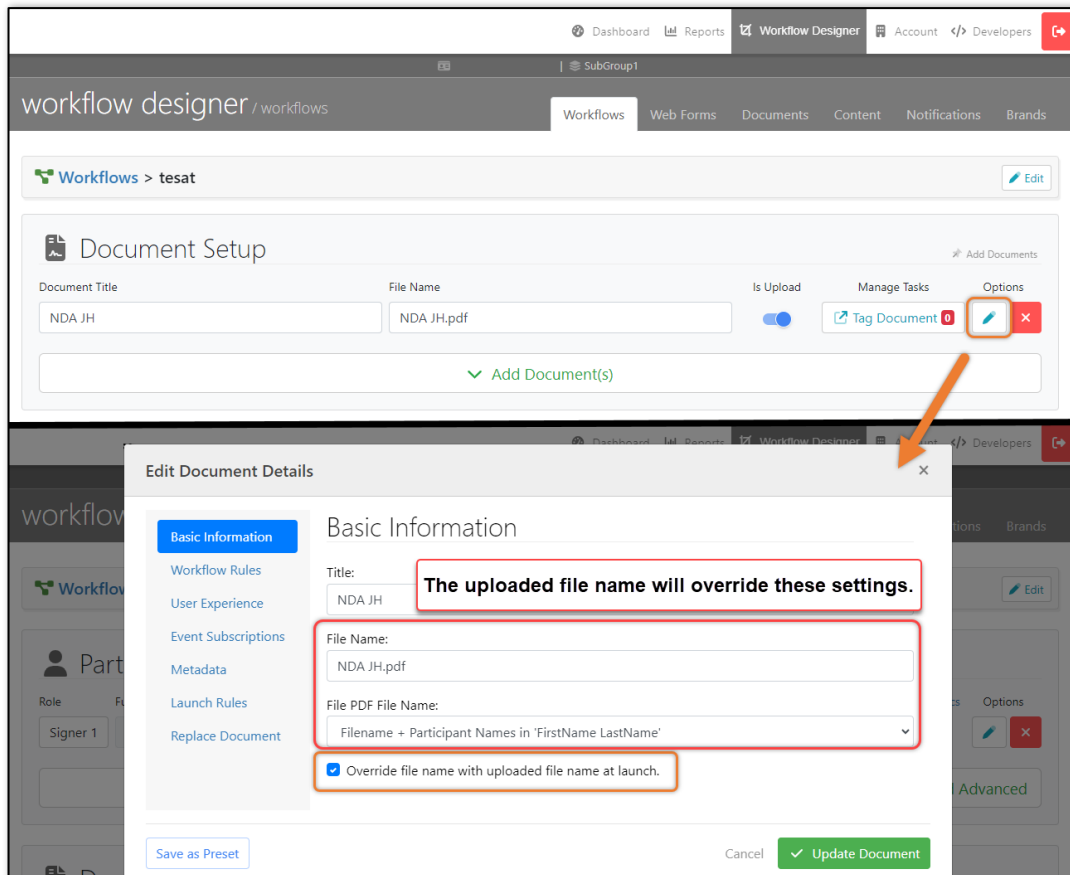


[PEP-6554] - Added Error indications in all editor modal tabs to notify the user when there's an error on active and inactive tabs. This allows the user to see there's an issue and where to go to resolve it when attempting to save any updates. Please see the example image below for additional details.

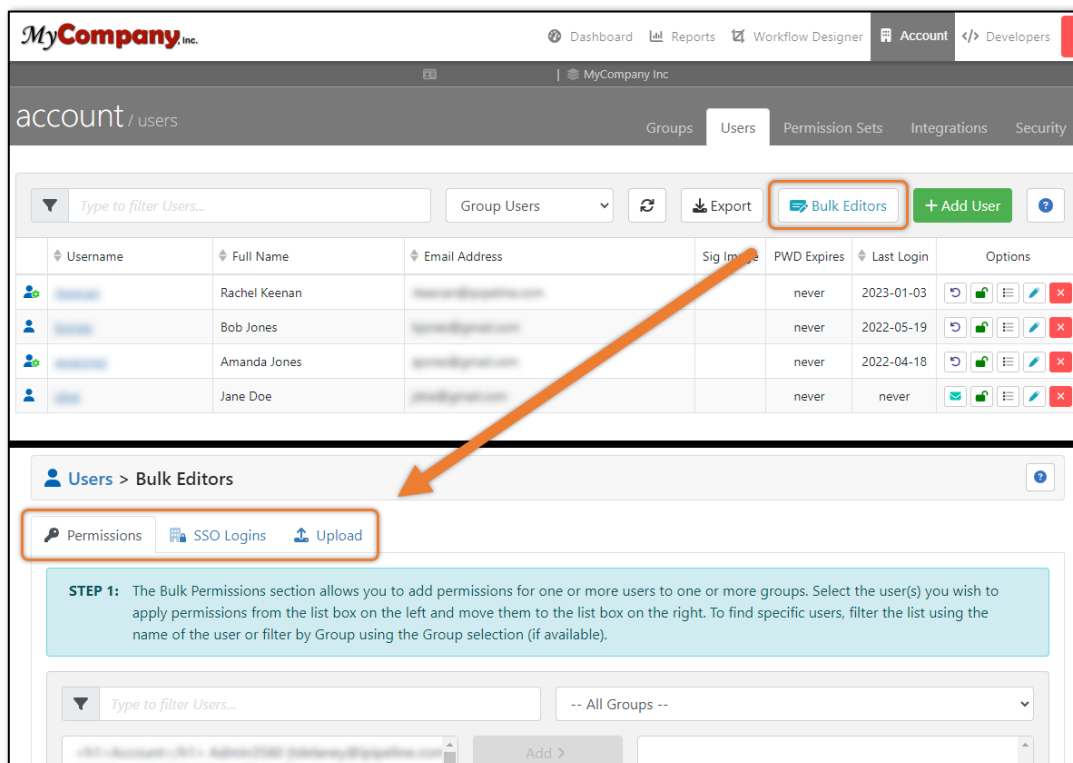


Release Notes

[PEP-6473] - Added the ability for the uploaded document file name to override the Document File Name set in the Workflow Document Details. Please see the image below for additional information.



[PEP-6245] - Centralized bulk user editors into one location and added a Bulk SSO Logins option. Bulk Permissions, Bulk User Upload, and Bulk SSO Logins are now located in the Bulk Editors section. Please see the image below for more details.



Release Notes

[PEP-6194] - Moved Permissions and SSO Logins for Users from the User Edit modal to the User details page. The Users details page can be accessed by clicking on the Username or the View Details button for the user. Please see the image below for additional details.

The screenshot displays the 'MyCompany Inc.' account management interface. The top navigation bar includes links for Dashboard, Reports, Workflow Designer, Account, and Developers. The 'account' section has tabs for Groups, Users, Permission Sets, Integrations, and Security. The 'Users' tab is active, showing a list of users with columns for Username, Full Name, Email Address, Sig Image, PWD Expires, Last Login, and Options. The user 'bjones' is highlighted. An orange arrow points from the 'bjones' username in the table to the 'Users > Bob Jones' page. Another orange arrow points from the 'Options' menu icon for 'bjones' to the same page. The 'Users > Bob Jones' page shows user details (Username: bjones, Full Name: Bob Jones, Email Address: bjones@gmail.com) and buttons for Edit User, Reset Password, and Delete User. Below the details, there are tabs for Permissions (3), SSO Logins, and Emails (1). An orange arrow points from the 'Permissions' tab to a table of permissions. The table has columns for Account, Permission Set, Open Signing, Pending Signatures Queue, and Options. The first row shows 'My Company Internal' with the 'Administrator' permission set, 'Open Signing' checked, and 'Pending Signatures Queue' checked.

Username	Full Name	Email Address	Sig Image	PWD Expires	Last Login	Options
[icon]	Rachel Keenan	[email]		never	2023-01-03	[icon] [icon] [icon] [icon] [icon]
bjones	Bob Jones	[email]		never	2022-05-19	[icon] [icon] [icon] [icon] [icon]
[icon]	Amanda Jones	[email]		never	2022-04-18	[icon] [icon] [icon] [icon] [icon]
[icon]	Jane Doe	[email]		never	never	[icon] [icon] [icon] [icon] [icon]

Account	Permission Set	Open Signing	Pending Signatures Queue	Options
My Company Internal	Administrator	✓	✓	[icon] [icon]

[PEP-6153] - Added support for displaying errors on unselected tabs in the Profile Editor. Please see the image below for an example.

The screenshot shows the 'Profile Editor' window with a sidebar containing tabs for Basic Information, Signature Image, Password, and Localization. The 'Basic Information' tab is selected. The form fields are: Username (text), First Name (text, required), Last Name (text, required), Mobile Number (text), Title (text), and Organization (text). The 'First Name' and 'Last Name' fields have red 'Required' error messages. The 'Signature Image', 'Password', and 'Localization' tabs are unselected, and their respective fields are not visible.

Profile Editor

Basic Information

Username: [text]

First Name: [text] Required

Last Name: [text] Required

Mobile Number: [text]

Title: [text]

Organization: [text]

Cancel Update Profile

Release Notes

[PEP-6151] - Added additional placeholders for notifications. More information can be found in the developers guide. <https://developers.alphatrust.com/documentation/participants/notification-placeholders.html>.

[PEP-6149] - Added the ability to reorder Workflow Actions for Participants and Document Tasks. This ability was also added to Web Form options for Radio Buttons, Checkboxes, and Dropdown Lists. Please see the examples for Workflow Actions and Web Form options in the images below.

The screenshot shows the 'Edit Participant Details' form. On the left is a sidebar with navigation links: Basic Information, Authentication, User Experience, Email Customization, Reminders, Completed Notifications, Workflow Actions (highlighted in blue), Workflow Rules, and Event Subscriptions. The main content area is titled 'Workflow Actions'. It contains two action entries: 'Action 1' and 'Action 2'. Each entry has a 'Type' dropdown menu (set to 'Process Explanation' and 'Document Review' respectively) and a 'Delete' button. There are also up and down arrow icons for reordering. At the bottom, there is an 'Add Workflow Action' button and a 'Show Advanced' checkbox.

The screenshot shows the 'Form Editor' for a field named 'Field 1: "Example Check List" [checkbox]'. The left sidebar has three tabs: Display, Options (highlighted in blue), and Validation. The main content area is titled 'Options'. It contains two option entries: 'Option 1' and 'Option 2'. Each entry has a 'Label' field (set to 'Item 1' and 'Item 2' respectively), a 'PDF Field Name' field, a 'Data' field (set to 'Yes'), and a 'Default check state' checkbox. There are also up and down arrow icons for reordering. At the bottom, there is an 'Add Option' button. At the very bottom of the form, there are 'Cancel' and 'Save Changes' buttons.

Release Notes

[PEP-6026] - Enabled editing of PDF Documents in the Workflow Designer > Documents tab. This includes options to add/edit fields within the PDF, save changes directly to the PDF file, and the ability to optimize and flatten PDFs. Please see the image below for the settings and options referenced.

The screenshot displays the Workflow Designer interface with the Documents tab selected. The top navigation bar includes links for Workflows, Web Forms, Documents, Content, Notifications, and Brands. A search bar and a '+ Add Document' button are present. Below the navigation bar, a table lists documents, with 'New_Patient_Form.pdf' highlighted. An orange box highlights the 'Options' column for this document, showing icons for edit, delete, and a settings menu. An arrow points from this menu to the 'Documents > New_Patient_Form.pdf' view. In this view, an orange box highlights the top toolbar containing 'Optimize', 'Flatten', 'Export', 'Rename', and 'Save' buttons. Another orange box highlights the 'Add Form Fields' panel on the left, which lists various field types: Textbox, Checkbox, Radio Buttons, Drop-Down List, and Multiline Textbox. The central area shows the 'New Patient Form' PDF with various form fields. On the right, the 'Field Properties' panel is visible, showing options to edit, clone, or delete a field.

[PEP-6025] - Updated the UI for Workflow Setup, Content, Notifications, Web Forms, and Brand pages to be more consistent with other new UI updates. Please see the image below for more details.

Release Notes

The image displays four screenshots of the MyCompany Inc. Workflow Designer interface, showing the redesigned Web Forms page and other sections. Each screenshot highlights a set of action buttons in an orange box.

Screenshot 1: Workflows > Test

Participant Setup

Role: **Signer 1** | Full Name: Full Name entered at launch... | Email Address: Email Address entered at launch... | In-Person: ☐ | Final Email: ☐ | Include Docs: ☐ | Options: ☐

Export **Edit** **Save**

Screenshot 2: Web Forms > My Untitled Form

Test Device Export Rules Edit Save

Untitled Form

This is my form. Please fill it out.

Screenshot 3: Content > MyCompanyInternal

Supported Languages: English | + Add Language

		Last Modified	Options
<input type="checkbox"/>	Content Page Template		
<input type="checkbox"/>	Access Denied		
<input type="checkbox"/>	Authentication (Common)		

Export **Rename**

Screenshot 4: Notifications > MyCompanyInternal

Supported Languages: English | + Add Language

Email Templates: 0 | SMS Templates

		Last Modified	Options
<input type="checkbox"/>	Notification Template		
<input type="checkbox"/>	Registered User: Welcome Notification	2022-04-07	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Export **Rename**

Screenshot 5: Brands > MyCompanyInternal

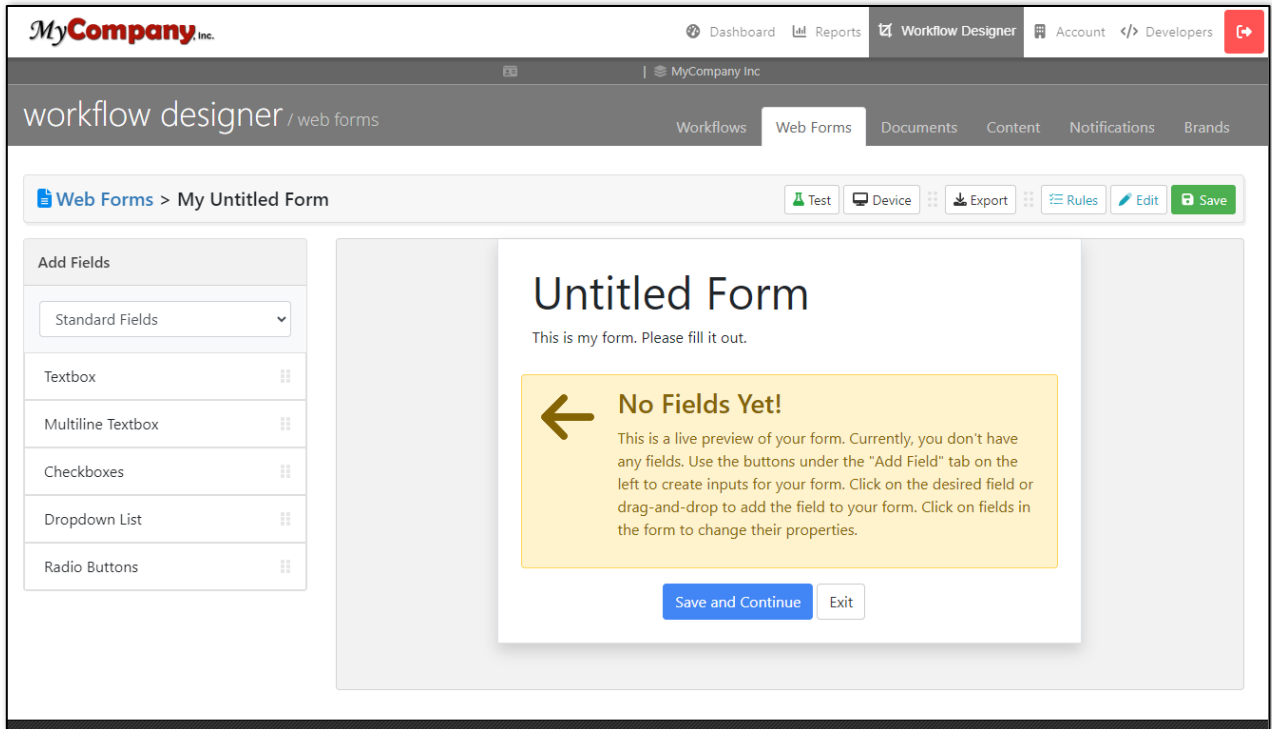
Select the checkbox of one or more Brand Page Types from the list to allow edit initialization.

		Last Modified	Options
<input type="checkbox"/>	Brand Page Type Template		
<input type="checkbox"/>	Common CSS		
<input type="checkbox"/>	DocForms UI		

Export **Rename**

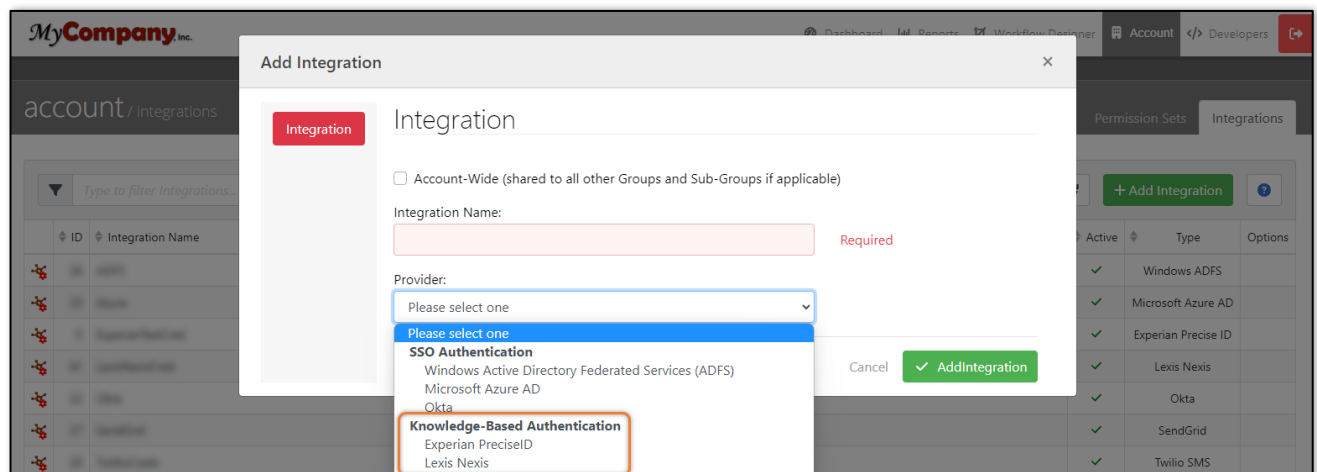
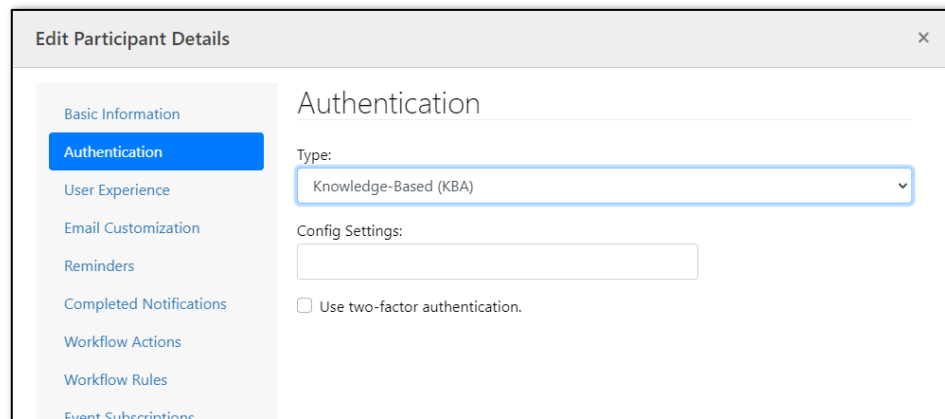
[PEP-5974] - Redesigned the Web Forms page for more consistent UI across the platform. Please see the image below for more details.

Release Notes



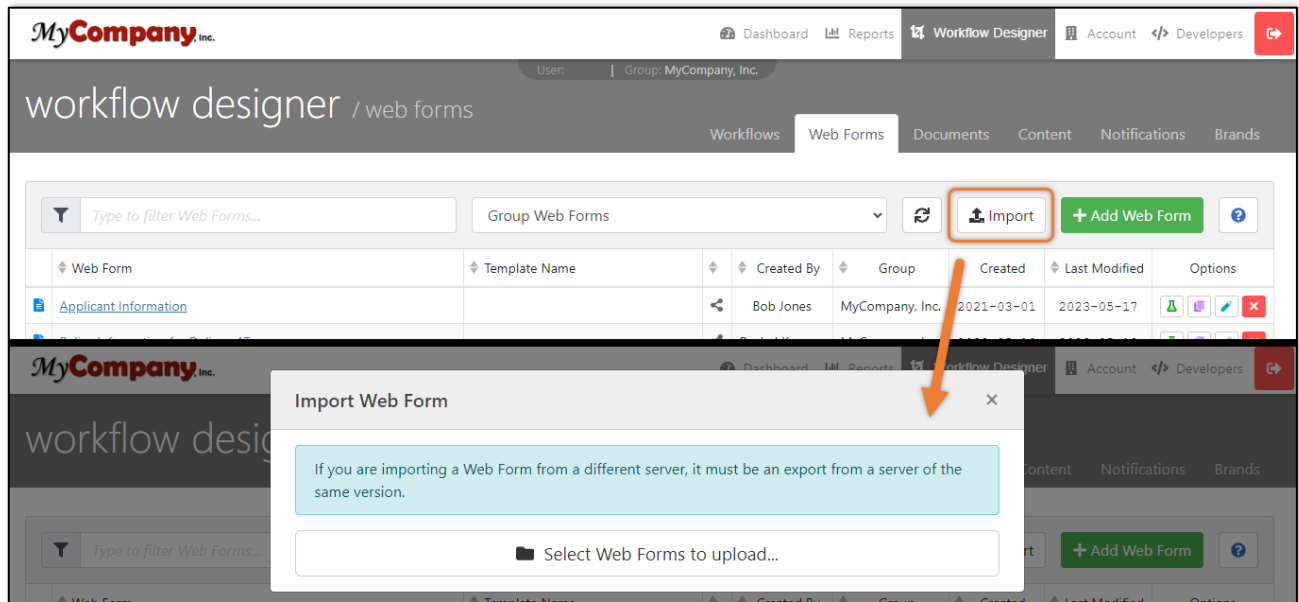
Bug Fixes

[PEP-6906] - Fixed issue where Participant metadata used to authentication via KBA wasn't properly overwriting the initial Participant metadata. Please see the images below for the settings referenced.

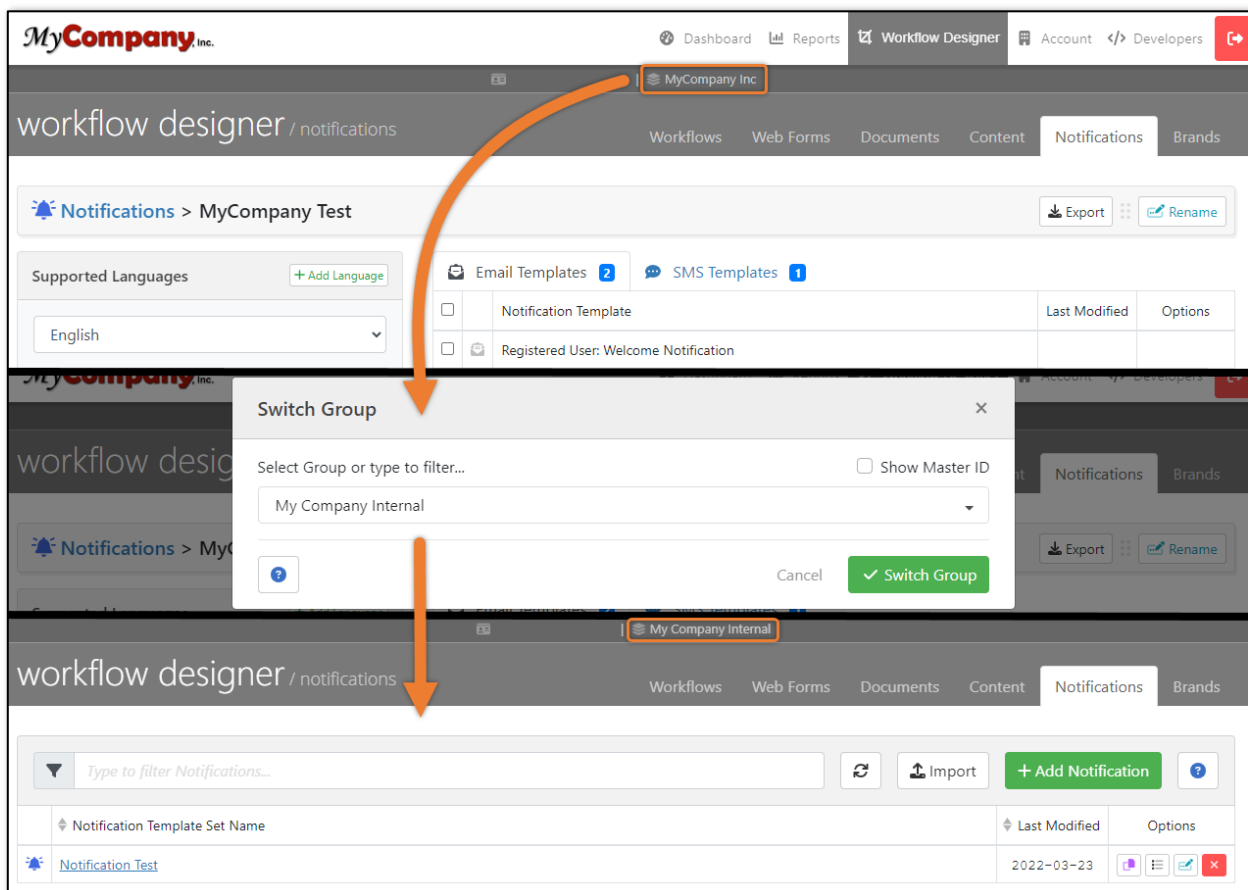


Release Notes

[PEP-6759] - Fixed issue where if a user closed an upload modal without completing an upload, the previously selected file list would remain instead of being cleared once the modal was closed. This issue was seen when importing Web Forms, Documents, Content, Notifications, and Brands. Please see the image below for more information.



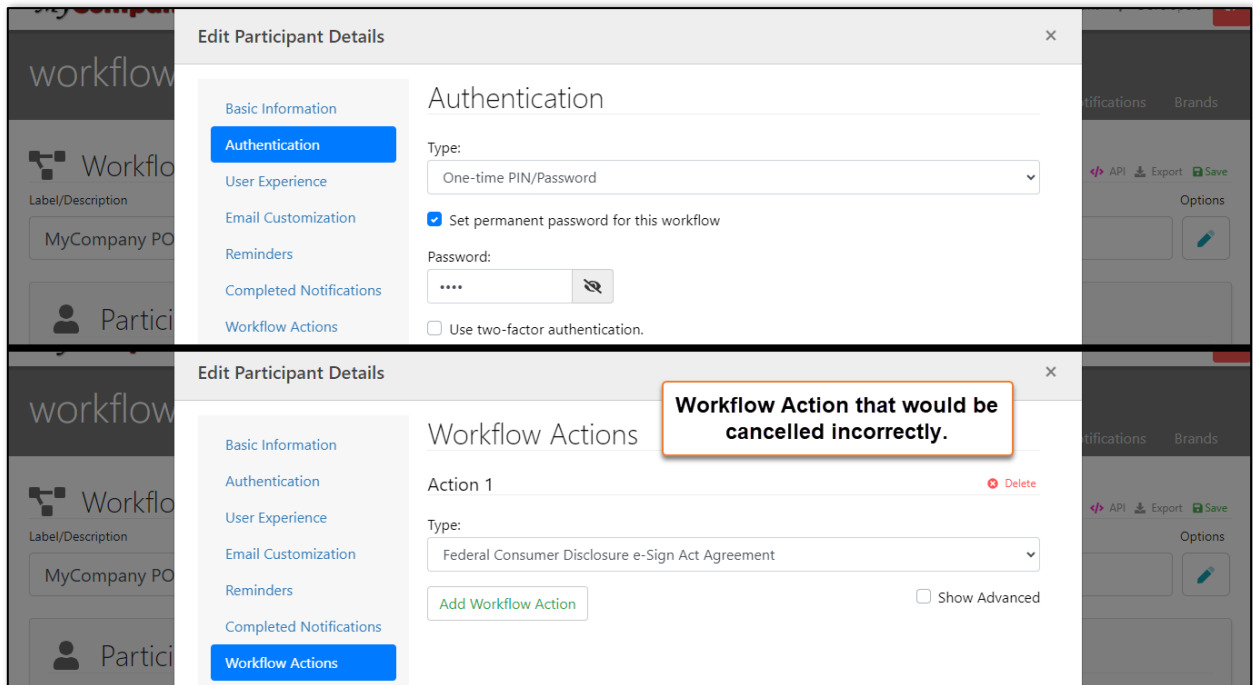
[PEP-6752] - Fixed issue where a user would not be returned to the Notifications, Documents, or Brands main screen after changing Groups. The user will now be redirected to the main list tab if the item doesn't exist in the content, notifications, brands, or documents tabs after switching Groups.



[PEP-6751] - Fixed issue where the content security policy would block log rocket from consistently recording.

Release Notes

[PEP-6703] - Fixed issue where when exiting from an authentication screen, the next workflow action would be incorrectly cancelled. Please see the images below of the referenced settings and additional details.



Edit Participant Details

Authentication

Type: One-time PIN/Password

☒ Set permanent password for this workflow

Password: ****

☐ Use two-factor authentication.

Workflow Actions

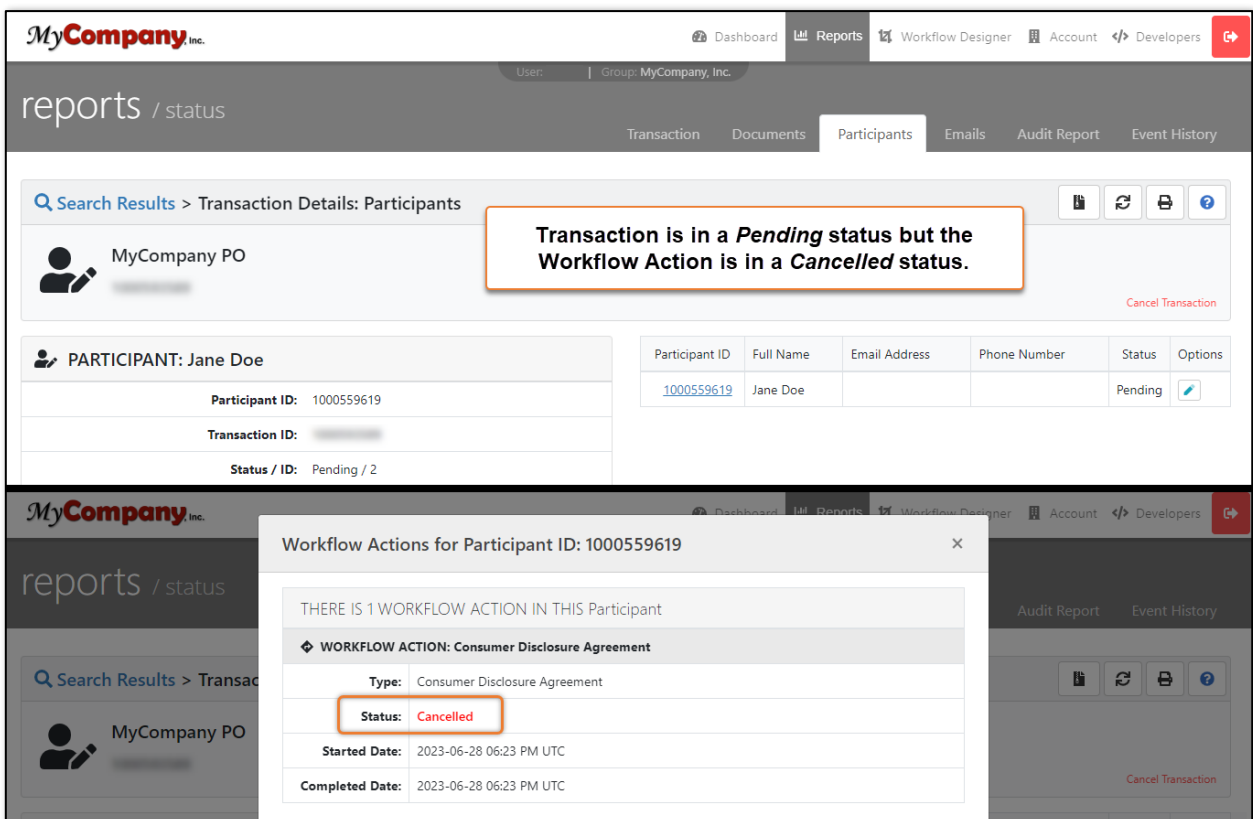
Action 1

Type: Federal Consumer Disclosure e-Sign Act Agreement

[Add Workflow Action](#)

☐ Show Advanced

Workflow Action that would be cancelled incorrectly.



reports / status

Transaction Documents **Participants** Emails Audit Report Event History

Transaction Details: Participants

MyCompany PO

Transaction is in a Pending status but the Workflow Action is in a Cancelled status.

PARTICIPANT: Jane Doe

Participant ID: 1000559619

Transaction ID: [REDACTED]

Status / ID: Pending / 2

Participant ID	Full Name	Email Address	Phone Number	Status	Options
1000559619	Jane Doe			Pending	Edit

Workflow Actions for Participant ID: 1000559619

THERE IS 1 WORKFLOW ACTION IN THIS Participant

WORKFLOW ACTION: Consumer Disclosure Agreement	
Type:	Consumer Disclosure Agreement
Status:	Cancelled
Started Date:	2023-06-28 06:23 PM UTC
Completed Date:	2023-06-28 06:23 PM UTC

[PEP-6669] - Fixed issue where Custom Field Labels were not being shown when defining another participant in a transaction. This affected all information that could be requested for another participant. Please see the image below for the settings referenced.

Release Notes

The screenshot shows the 'Edit Participant Details' dialog box with the 'Workflow Actions' tab selected. On the left is a sidebar with various configuration options. The main area is titled 'Workflow Actions' and shows 'Action 1'. The 'Type' is set to 'Define Another Participant'. The 'Participant to Define' is 'Signer 2'. A 'Full Name' field is highlighted with an orange border, containing a placeholder text: 'You can customize this field's label for the Defining Participant.' Below this are checkboxes for 'Required' (checked), 'Prepopulate', and 'Read-Only'. A list of other fields like 'Email Address', 'Phone Number', 'Title', etc., is shown with checkboxes. At the bottom right is a 'Show Advanced' checkbox.

Edit Participant Details

Basic Information
Authentication
User Experience
Email Customization
Reminders
Completed Notifications
Workflow Actions
Workflow Rules
Event Subscriptions
Placeholders
PDF Fields
Launch Rules
Launch Display
Launch Domain Restrictions
Launch Labels

Workflow Actions

Action 1 ⬆️ ⬆️ Delete

Type:
Define Another Participant

Participant to Define:
Signer 2

☒ Full Name ^ options

Custom Field Label:
You can customize this field's label for the Defining Participant.

☒ Required
☐ Prepopulate
☐ Read-Only

☐ Email Address
☐ Phone Number
☐ Title
☐ Organization
☐ Authentication
☐ Two-Factor Authentication
☐ Custom Email Message
☐ Customize Page Content

Add Workflow Action Show Advanced

[PEP-6667] - Fixed issue where a user could enter an organization name longer than 64 characters. Added max character length check for the participant organization property.

[PEP-6608] - Fixed issue where the “Add Placeholder Value” button would not appear at the bottom of the Notifications section in the Edit Workflow Details pop-up. Please see the image below for more information.

The screenshot shows the 'Edit Workflow Details' dialog box with the 'Notifications' tab selected. The sidebar on the left has 'Notifications' highlighted. The main area is titled 'Notifications' and shows options to send 'Complete', 'Cancel', or 'Expired' notifications. Below these are fields for 'Full Name' and 'Email Address' for 'Notification 1'. A green 'Add Placeholder Value' button is highlighted with an orange border. Below it is an 'Add Final Notification' button. At the bottom, a 'Placeholder Values' section is also highlighted with an orange border, showing a table with 'Placeholder Name' and 'Placeholder Value' columns. At the very bottom are 'Save as Preset', 'Cancel', and 'Update Workflow' buttons.

Edit Workflow Details

Basic Information
Expirations
Notifications
User Experience
Email Sender
Event Subscriptions
Metadata
Launch Display
Launch Rules
Launch Web Forms

Notifications

☒ Send "Complete" notification
☐ Send "Cancel" notification
☐ Send "Expired" notification

☐ Include documents as attachments

Launcher Notification:
None

Notification 1 ⬆️ Delete

Full Name:

Email Address:

Add Placeholder Value

Add Final Notification

Placeholder Values:

Placeholder Name	Placeholder Value
<input type="text"/>	<input type="text"/>

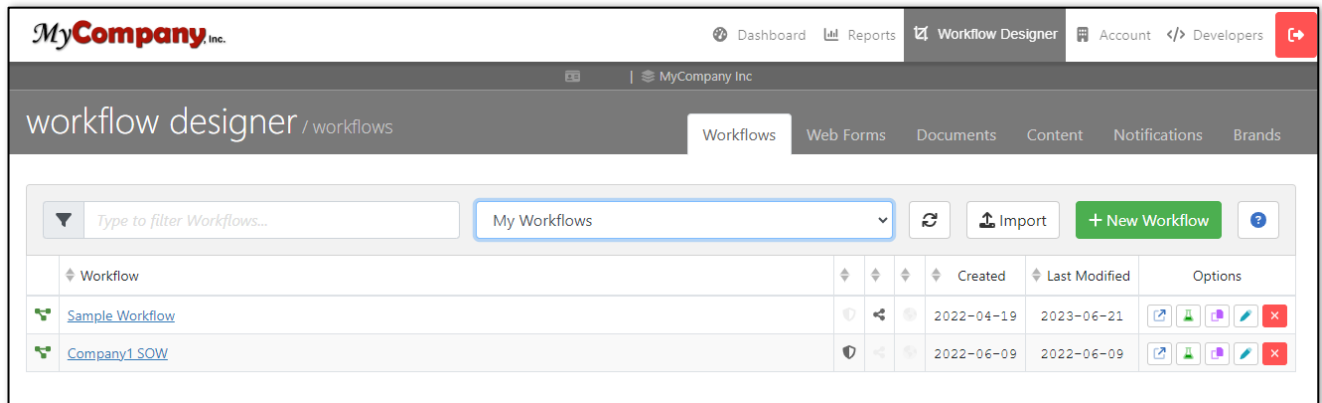
Add Placeholder Value

Add Final Notification

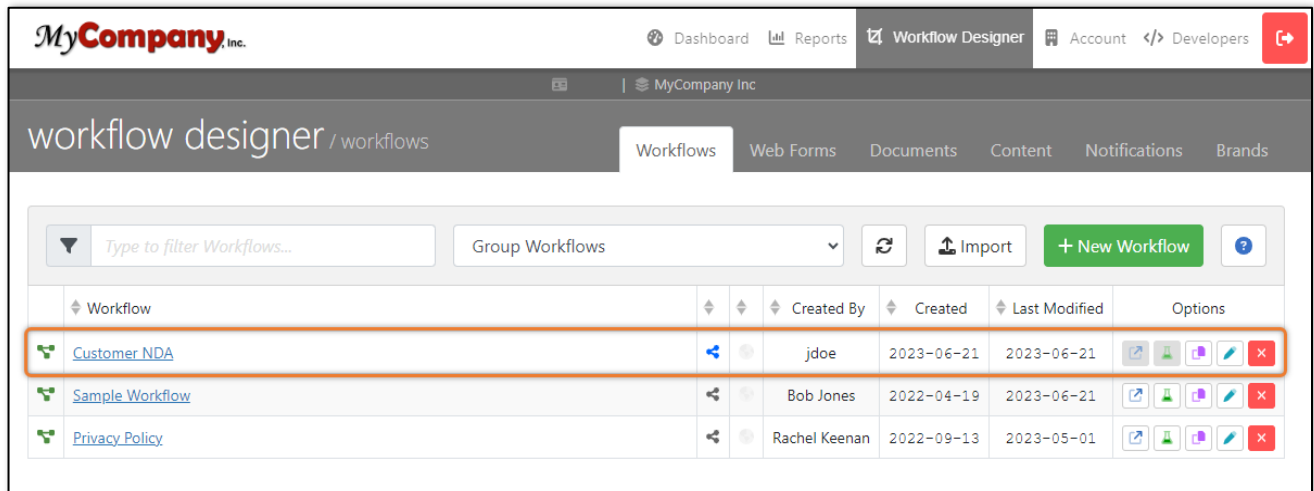
Save as Preset Cancel ✓ Update Workflow

Release Notes

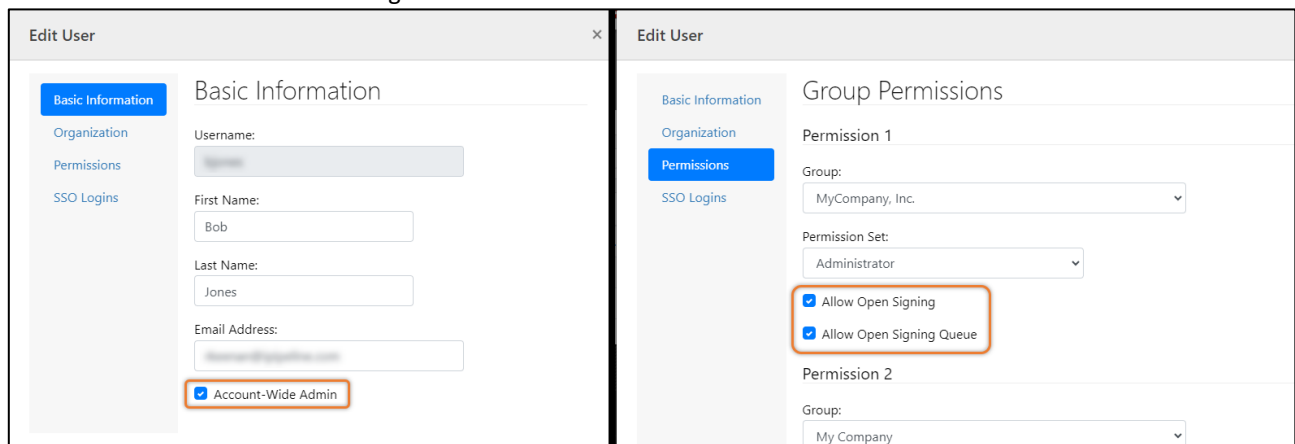
[PEP-6564] - Fixed issue where Workflows may not appear when switching from the Group Workflows filter to My Workflows filter. Workflows would appear after navigating away and returning to the My Workflows filter. Please see the image below for more information.



[PEP-6561] - Fixed issue where the copy button would be disabled if the user who created the Workflow was deleted. Please see the example Workflow, which was created by a deleted user, in the image below.



[PEP-6559] - Fixed issue where Account-wide admins that do not have explicit open-signing permissions would be able to see and sign open-signing transactions. Please see the images below for an example transaction with open-signing and the referenced User and Workflow settings.



Release Notes

The 'Edit Participant Details' dialog box is shown with the 'Authentication' tab selected. The 'Type' dropdown is set to 'Registered User'. The 'User' dropdown is set to '-- Any Registered User --'. There are checkboxes for 'Allow Launcher to choose Registered User.' and 'Use two-factor authentication.'.

Edit Participant Details

Authentication

Type: Registered User

☐ Allow Launcher to choose Registered User.

User: -- Any Registered User --

☐ Use two-factor authentication.

Save as Preset Cancel Update Participant

The dashboard shows the 'Pending Signatures' section. A table lists pending signatures with columns for Transaction ID, Transaction Description, Participant ID, Name, Email, Auth Type, Requested By, and Sign. The 'Sign' column has a button with a plus icon and a user icon. An orange box highlights the 'Pending Signatures' tab and the 'Sign' button.

MyCompany Inc.

Dashboard Reports Workflow Designer Account Developers

User: Group: MyCompany, Inc.

dashboard / pending signatures

Quick Stats Workflow Templates Launch Pending Signatures

Type to filter Pending Signatures...

☐ Include All Groups ☐ Show Test Transactions Auto-Sign Selected

<input type="checkbox"/>	Transaction ID	Transaction Description	Participant ID	Name	Email	Auth Type	Requested By	Sign
<input type="checkbox"/>		MyCompany PQ		Jane Doe		registered: (ANY)	MyCompany, Inc.	

[PEP-6558] - Fixed issue where the Allow Pending Signatures Queue setting was mislabeled and would only appear after selecting the Allow Open Signing setting. Please see the image below for more information.

The 'Edit Permission' dialog box is shown with the 'Group Permissions' tab selected. The 'Group' dropdown is set to 'My Company Internal'. The 'Permission Set' dropdown is set to 'Administrator'. The 'Allow Pending Signatures Queue' checkbox is checked and highlighted with an orange box. The 'Allow Open Signing' checkbox is also checked. A note below states: 'This will allow this user to sign as any Participant that uses the Registered User authentication and that has not assigned a specific user.'

Edit Permission

Group Permissions

Group: My Company Internal

Permission Set: Administrator

☒ Allow Pending Signatures Queue

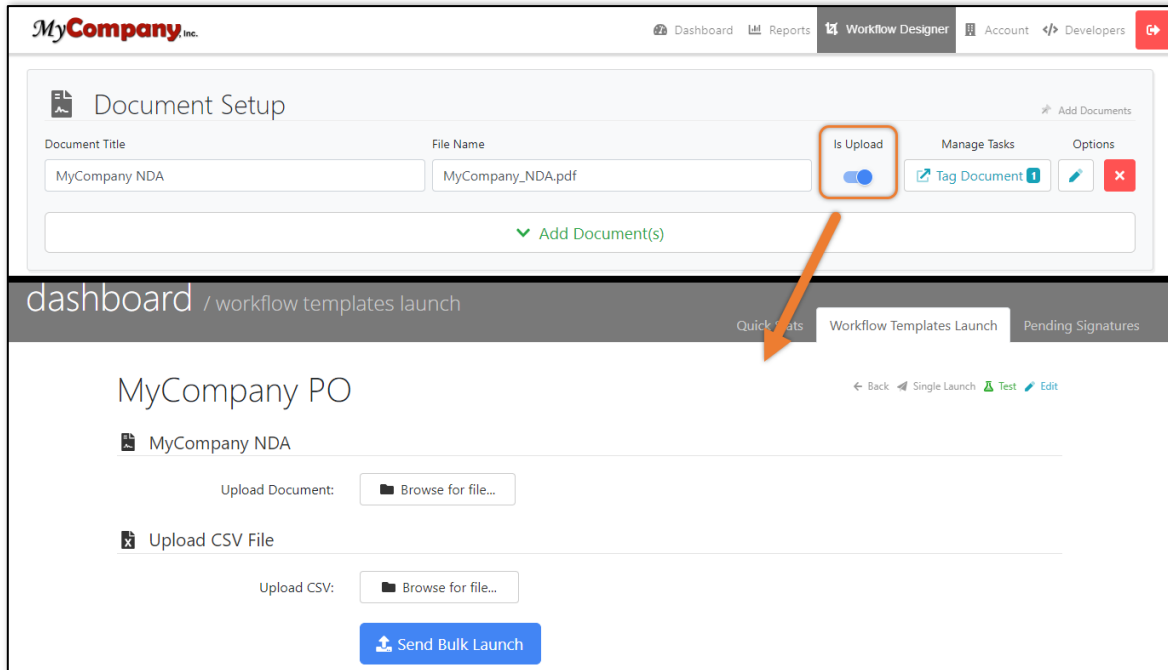
☒ Allow Open Signing (not recommended)

This will allow this user to sign as any Participant that uses the Registered User authentication and that has not assigned a specific user.

Cancel Update Permission

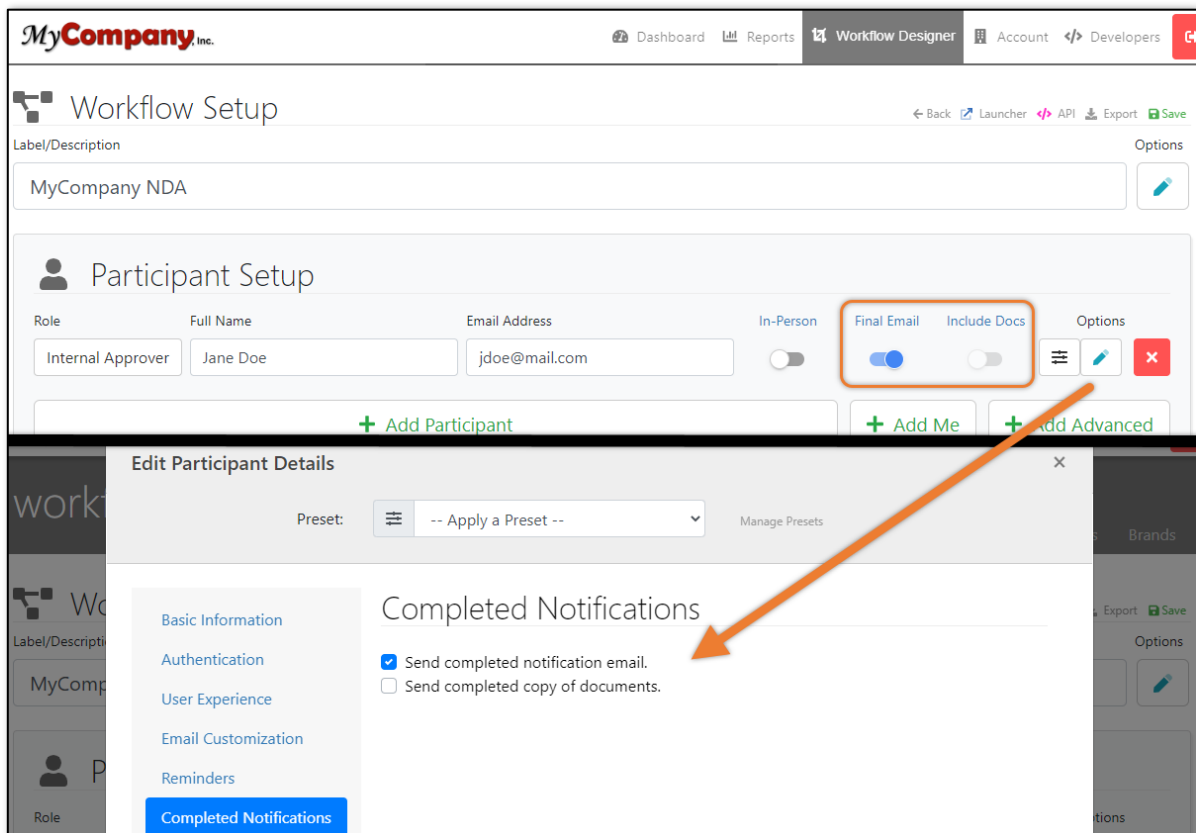
Release Notes

[PEP-6371] - Fixed issue where fields would not properly populate for an uploaded document when bulk launching. Please see the referenced settings in the image below.



[PEP-6231] - Fixed issue where the Profile Editor would keep the Updated Password checkbox enabled and would reopen on the Password tab after a user clicks on the cancel button. The Profile Editor will open on the Basic Information tab every time it is opened.

[PEP-6218] - Fixed issue where when the Final Email participant toggle is enabled the Include Docs toggle should also be enabled automatically but is not. When the Final Email participant toggle is enabled, the user should be able to enable or disable the Include Docs toggle. Please see the referenced setting in the image below.



Release Notes

[PEP-6173] - Fixed issue where phone validation would intermittently stop working for Mobile authentication when setting it for a new participant. *Mobile* Authentication has been renamed to *One-Time Passcode*. Please see the image below for an example of phone number validation working correctly.

Edit Participant Details

Authentication

Type: One-Time Passcode

Send As: Sms

Passcode length: 4

Integration Name: TwilioCreds

☒ Set permanent phone number for this workflow

Send to mobile phone number: /1234567890 Phone number is not valid

Number of phone number characters to leave unmasked: 4

Save the raw response? No

☐ Use two-factor authentication.

Save as Preset Cancel

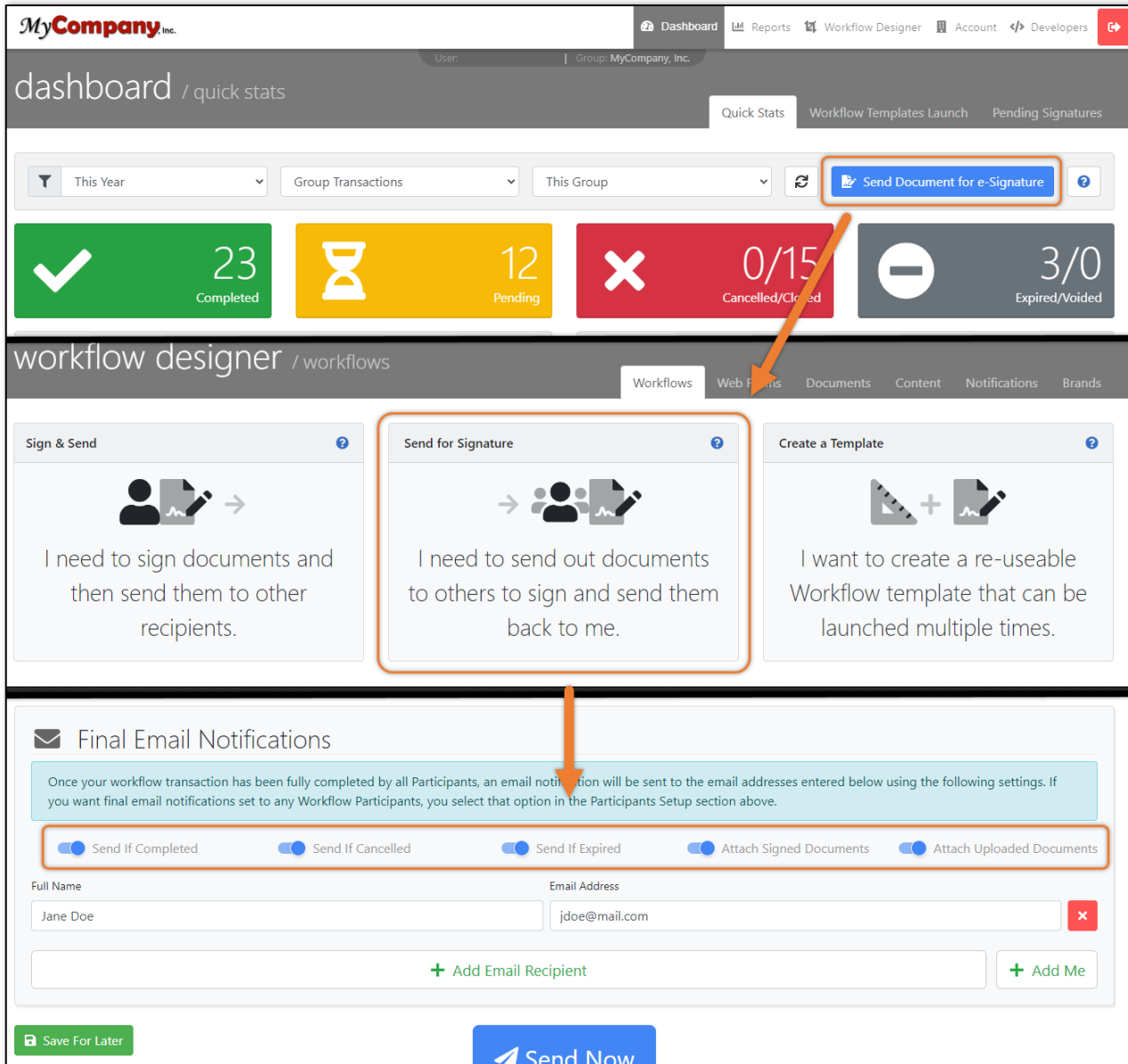
v5.16.7 Release

Production Release Date: 7/13/2023

Bug Fixes

[PEP-6728] - Fixed issue where the toggle buttons within the Final Email Notifications section would not properly update for *Send for Signature* ad hoc Workflows. Please see the image below for additional information.

Release Notes



[PEP-6722] - Fixed issue where the signing UI could get hung indefinitely if it could not connect to an external resource. Added request timeout into the Control Panel and Signing UI to fix the resource issue.

[PEP-6721] - Fixed issue where the document service would report and log an error that was not an actual error. Updated the locking strategy so multiple services would not cause the error to be reported.

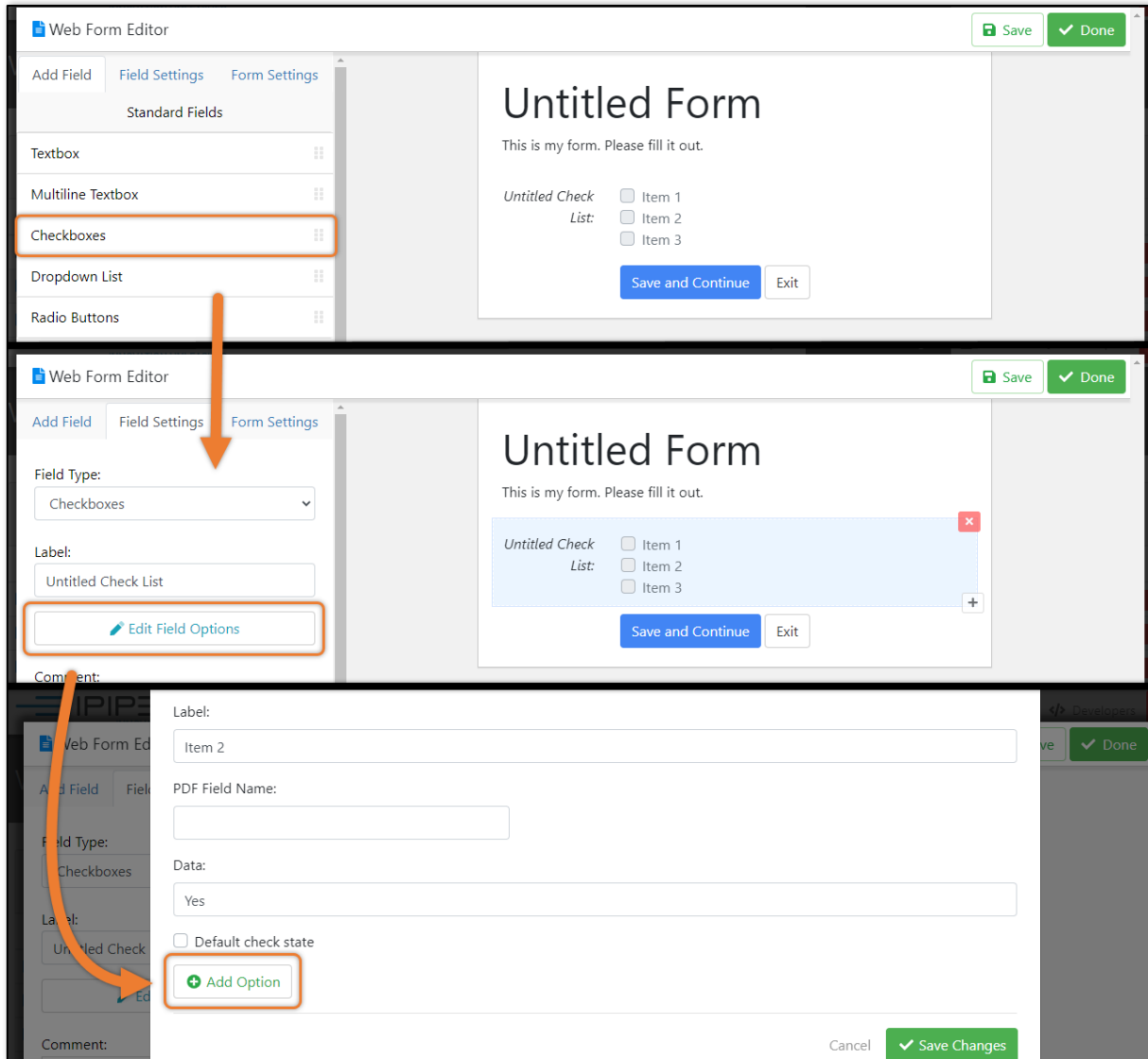
v5.16.6 Release

Production Release Date: 6/1/2023

Bug Fixes

[PEP-6702] - Fixed issue where checkbox options could not be added to a Web Form. The default checkbox setting includes three options. The Add Options button would not add a new option as it should. Please see the checkbox and Web Form settings referenced below.

Release Notes



[PEP-6701] - Fixed issue where the CreateTransaction() API request would fail if it contained multiple actionable tasks with no placement information. The resulting error message seen stated "Can't locate coordinates: Field 'field_name' not found".

[PEP-6691] - Fixed issue where Carbon Copy and Delivery tasks would appear on the Process Explanation screen when they should not. Please see the image below for the Workflow Action settings and an example of the Process Explanation Screen.

Release Notes

E-Signature Process Explanation

Thank you for agreeing to sign your document online. This fast, safe and secure process will permit you to review your document and sign online with a legally valid electronic signature.

This process consists of the following steps:

- 1. Document: MyCompany NDA**
 - Test Completion Web Form
 - Additional Document Upload
 - Apply your Electronic Signature to the document

You will have a chance to review the final document and then apply your electronic signature. You will be able to download a signed copy of the agreement after signing.

[Continue](#)

Edit Participant Details

Preset: -- Apply a Preset -- Manage Presets

Basic Information
Authentication
User Experience
Email Customization
Reminders
Completed Notifications
Workflow Actions

Workflow Actions

Action 1 Delete

Type: Process Explanation

[Add Workflow Action](#) ☐ Show Advanced

[PEP-6685] - Fixed issue where transactions would be stuck in a pending status if a participant was assigned a Signature task followed by a Delivery task. Please see the image below for an example of the assigned tasks.

Tasks Editor

Signer 1 ☐ Enable DocForms

Task Placement

- Signature
- Initials
- Approval
- Delivery
- Carbon Copy

New Patient Form

Signer 1 [Signature]

Date: _____ Full Name: _____ Phone: _____
Date of Birth: _____ Gender: _____ Email: _____
Address: _____ City: _____ State: _____ Zip: _____
Employer Name, Address, & Phone: MyCompany Inc, 1234 Company Street, 890-123-4567
Do you have health insurance? ☐ Yes ☐ No *If yes, please give company name, address, & phone below:*
Have you seen a Chiropractor before? ☐ Yes ☐ No Where? _____

Task List ☐ Enable Sort

Click to edit a Task. (Double-click for all properties)

- Signature 1
- Delivery 1

[PEP-6681] - Fixed issue where transaction emails would not load correctly within the Emails tab of the transaction details. Please see the image below for an example of the Emails tab referenced.

MyCompany Inc.

Dashboard Reports Workflow Designer Account Developers

User: Group: MyCompany, Inc.

reports / status

Transaction Documents Participants **Emails** Audit Report Event History

Search Results > Transaction Details: Emails

Flexible Spending Acct. Reimbursement - Jane Doe
1000591707 Void Transaction

Status	Subject	Failed Event Reason	To	Participant ID	Event Date/Time
Delivered	Action Required for Jane Doe		jdoe@mail.com		2023-05-10 11:37 PM EDT
Processed	Action Required for Jane Doe		jdoe@mail.com		2023-05-10 11:37 PM EDT
Sent	Action Required for Jane Doe		jdoe@mail.com		2023-05-10 07:37 PM EDT

Release Notes

v5.16.5 Release

Production Release Date: 5/18/2023

Bug Fixes

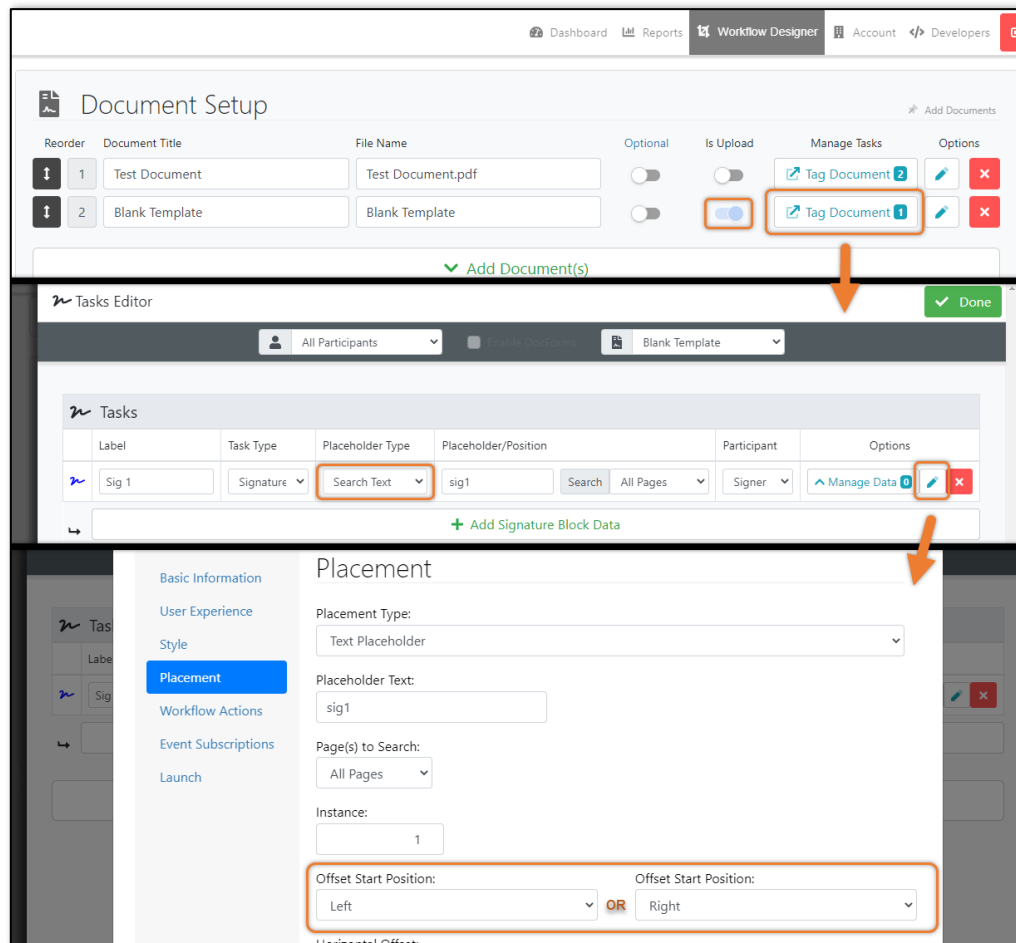
[PEP-6637] - Fixed issue where transactions could not be created when encrypted PDF/A documents were uploaded or used.

v5.16.4.1 Release

Production Release Date: 5/4/2023

Bug Fixes

[PEP-6606] - Fixed issue where the vertical location would be shifted down by two pixels when placing the signature or signature data using the search text functionality, *Offset Start Position*, set to "Left" or "Right". This fixes the specific settings referenced in addition to what was fixed in PEP-6572. Please see the image below for the settings referenced.



v5.16.4 Release

Production Release Date: 5/4/2023

Bug Fixes

[PEP-6594] - Fixed issue in the new Signing UI which would cause performance issues on high-volume systems regarding the deletion of expired security tokens.

[PEP-6572] - Fixed issue where the vertical location would be shifted down by two pixels when placing the signature or signature data using the search text functionality. Please see the image below for the settings referenced.

Release Notes

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers

Document Setup

Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	MyCompany NDA	MyCompany_NDA.pdf	<input type="checkbox"/>	<input type="checkbox"/>	Tag Document 2	<input type="checkbox"/> <input type="checkbox"/>
2	Blank Template	Blank Template	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="checkbox"/> <input type="checkbox"/>

✓ Add Document(s)

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers

Tasks Editor

All Participants

Label	Task Type	Placeholder Type	Placeholder/Position	Participant	Options
Sig 1	Signature	Search Text	Sig1	Search All Pages	Signer 1 Manage Data

+ Add Signature Block Data

[PEP-6569] - Fixed issue where read-only form fields would be editable if the field name contained spaces. Please see an example and settings referenced in the images below.

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers

Edit Form Field Details

Basic Information Style Placement

Style

Font Color: Black

Font Size: 0 pt Leave blank for "Auto-Size"

Alignment:

☐ Multiline

☐ Hidden

☒ Read-Only

☐ Locked

Field Options

Field Type: Textbox

Participant: (field access) Any Participant

Field Name: Employer Name Address Phone

Initial Value: MyCompany Inc, 1234 Company Street, E

☐ Multiline

☐ Required

Edit More Field Properties

ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button.

Save & Continue →

TEST DOCUMENT - TEST DOCUMENT - TEST DOCUMENT

New Patient Form

Date: Full Name:

Date of Birth: Gender:

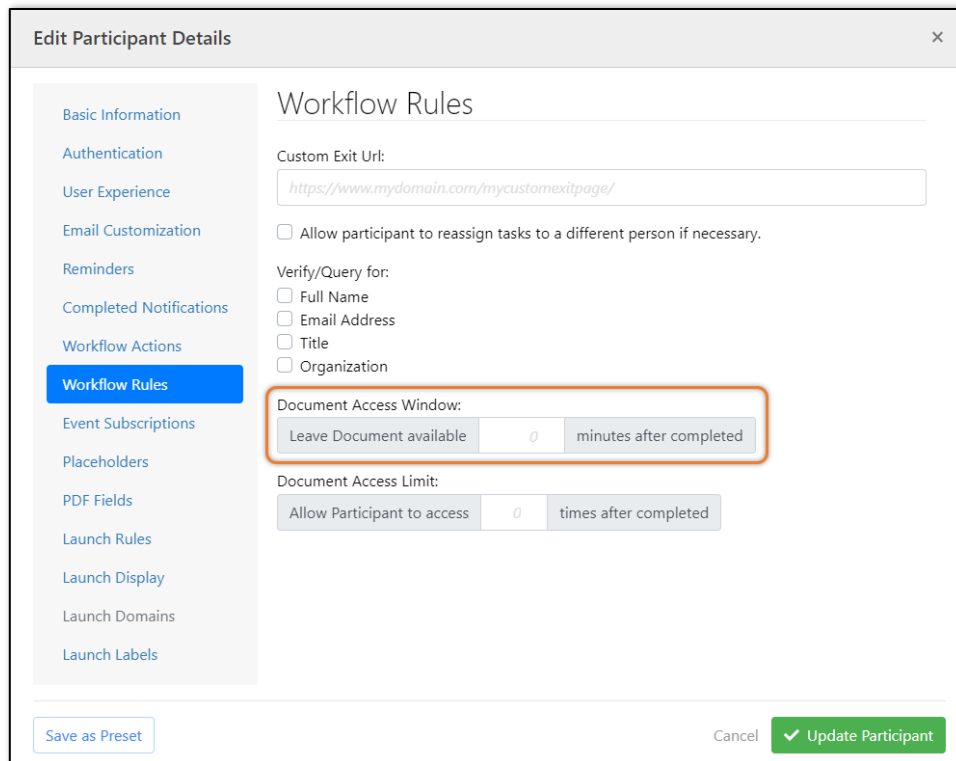
Address: City: State: Zip:

Employer Name, Address, & Phone: MyCompany Inc, 1234 Company Street, 890-123-45

Field should not be editable as it is set to Read-Only

[PEP-6560] - Fixed issue where transactions with only a delivery task, and the Document Access Windows set to any value other than zero, would show a "process cannot continue" error message instead of properly loading the exit page. Please see the images below for the referenced settings.

Release Notes



[PEP-6472] - Fixed issue where pages intermittently aren't saved to the database. Ensured that the signing process can continue if rows are missing from the Page table in the database.

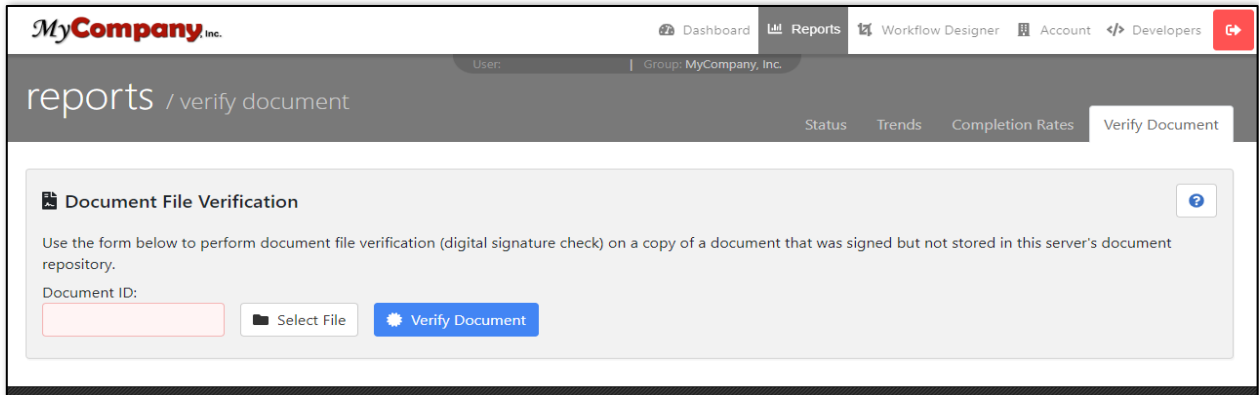
v5.16.3 Release

Production Release Date: 4/20/2023

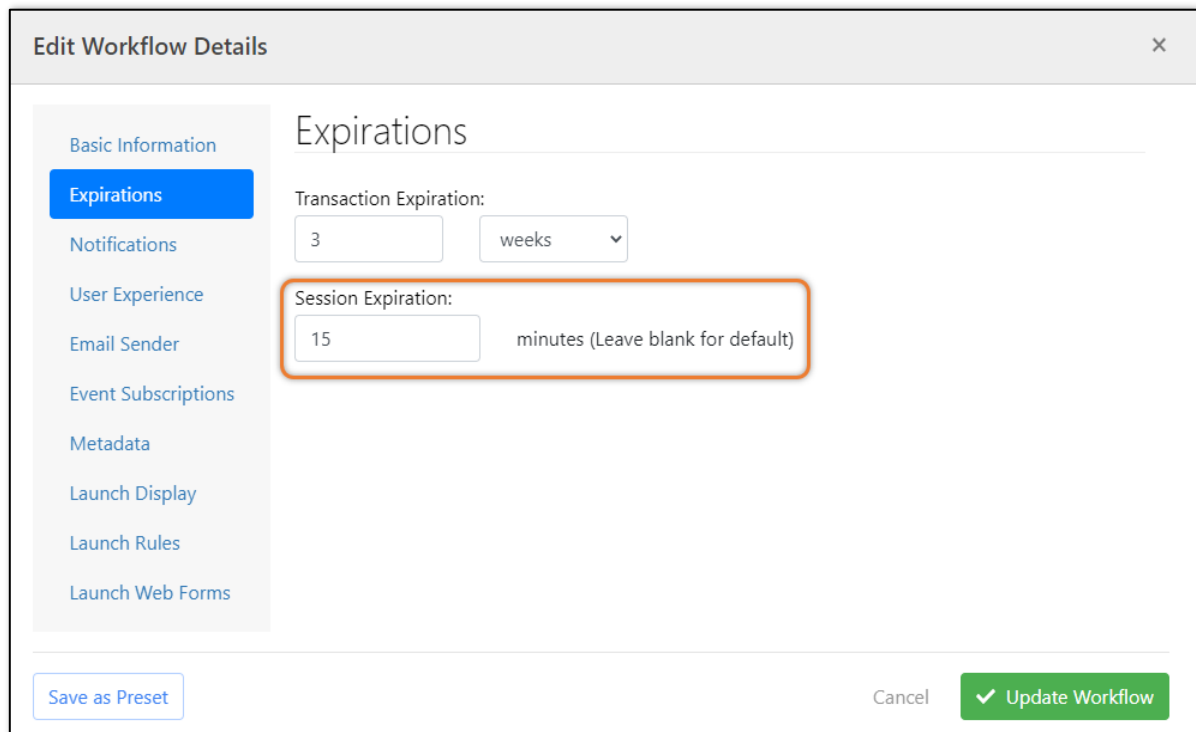
Bug Fixes

[PEP-6495] - Fixed issue where when attempting to verify an HTML document the user would receive an error message and the document was unable to be verified. Please reference the Verify Document feature in the image below.

Release Notes



[PEP-6480] - Fixed issue where if a user hit the session expiration limit, the timeout modal would not appear on screen. The timeout modal should appear on screen if the user exceeds the session expiration set. Please see the setting referenced in the image below.



[PEP-6302] - Fixed issue where phone numbers entered in Web Forms would lose their formatting when transferred onto a document. Please see the example image below of a phone number keeping it's formatting after being entered into a Web Form.

Release Notes

MyCompany, Inc.

Test Form

This is my form. Please fill it out.

Phone Number: 123-456-7890

Save and Continue Exit

v5.16.2.0

suscipit vel orci id, dictum consequat massa. Curabitur posuere ante justo, id iaculis ex fermentum vel. In convallis lectus et felis volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.

Internal Approver Initials: JD

Signed By: John Doe

Signature: 1000553153-1001340978

Printed Name: John Doe

Date: 4/4/2023

123-456-7890

v5.16.2.1 Release

Production Release Date: 4/6/2023

Bug Fixes

[PEP-6550] - Fixed issue where a transaction would not be created successfully when the CreateTransaction() API call would reference the Document Source via the FilePath property.

v5.16.2 Release

Production Release Date: 4/6/2023

Bug Fixes

[PEP-6382] - Fixed issue where when creating a Content or Notification set with a default language that is not English, the templates would not load correctly. Please see the example images below of a Content Set and templates using a non-English language as the default language.

MyCompany

Add Content

Name: ExternalCustomers

Language: Spanish

✓ Add Content Cancel

Content Template Set Name	Last Modified	Options
SampleContentSet	2020-10-02	
BobJonesSet	2020-10-16	

Release Notes

The screenshot shows the 'Content' tab in a management interface. On the left, there's a sidebar with 'Supported Languages' (Spanish) and an 'Overwrite From Another Content Template Set' section. The main area displays a table of templates. The 'Access Denied' template is highlighted with a blue row and a checkbox.

	Content Page Template	Last Modified	Options
<input checked="" type="checkbox"/>	Access Denied		
<input type="checkbox"/>	Authentication (Common)		
<input type="checkbox"/>	Authentication (Experian)		
<input type="checkbox"/>	Authentication (LexisNexis)		
<input type="checkbox"/>	Authentication (Mobile)		
<input type="checkbox"/>	Authentication (PIN/Password)		
<input type="checkbox"/>	Authentication (Registered User)		
<input type="checkbox"/>	Cancel/Suspend		
<input type="checkbox"/>	Confirm Intent		
<input type="checkbox"/>	Define Participant		
<input type="checkbox"/>	Document Tasks		
<input type="checkbox"/>	Exit		

[PEP-6353] - Fixed issue where if mobile authentication was set as the first method of authentication in a two-factor authentication workflow, the second authentication method would be ignored and or skipped as if it was not set. Please see the example image below for more information.

The 'Edit Participant Details' dialog box is shown with the 'Authentication' tab selected. It contains fields for 'Type' (Mobile), 'Integration Name', and checkboxes for 'Set permanent phone number for this workflow' and 'Use two-factor authentication'. The 'Second-Factor Authentication' section is also visible with a 'Type' dropdown set to 'One-time PIN/Password'.

Authentication

Type: Mobile

Integration Name: [Dropdown]

☐ Set permanent phone number for this workflow

Number of phone number characters to leave unmasked: 4

Save the raw response? No

Passcode length: 4

☒ Use two-factor authentication.

Second-Factor Authentication

Type: One-time PIN/Password

☐ Set permanent password for this workflow

Buttons: Save as Preset, Cancel, Update Participant

[PEP-6260] - Fixed issue where bulk launch was not allowing optional participants, if defined by another participant. Please see the example images below for the Participant and Workflow settings referenced.

Release Notes

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Workflow Actions

Action 1

Type:

Define Another Participant

Participant to Define:

Signer 2

☒ Full Name

☒ Email Address

☐ Phone Number

☐ Title

☐ Organization

☒ Authentication

☐ Two-Factor Authentication

☐ Custom Email Message

☐ Customize Page Content

Add Workflow Action

Show Advanced

Launch Rules

☒ This Participant is optional at launch.

☐ Allow custom email message by launcher.

Input Type:

This Participant's information will be defined by another Participant.

Save as Preset

Cancel

Update Participant

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Launch Rules

☒ Publish this Workflow as launchable template.

☒ Allow users in this Group to launch this Workflow.

☐ Allow users in all Sub Groups in this account to launch this Workflow.

☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.

☐ Allow this Workflow to be launched publicly with no authentication required.

☐ Allow the launch form to use the full page width (default is centered).

☐ Allow the Description to be edited at the time of launch.

☒ Enable Bulk Launching

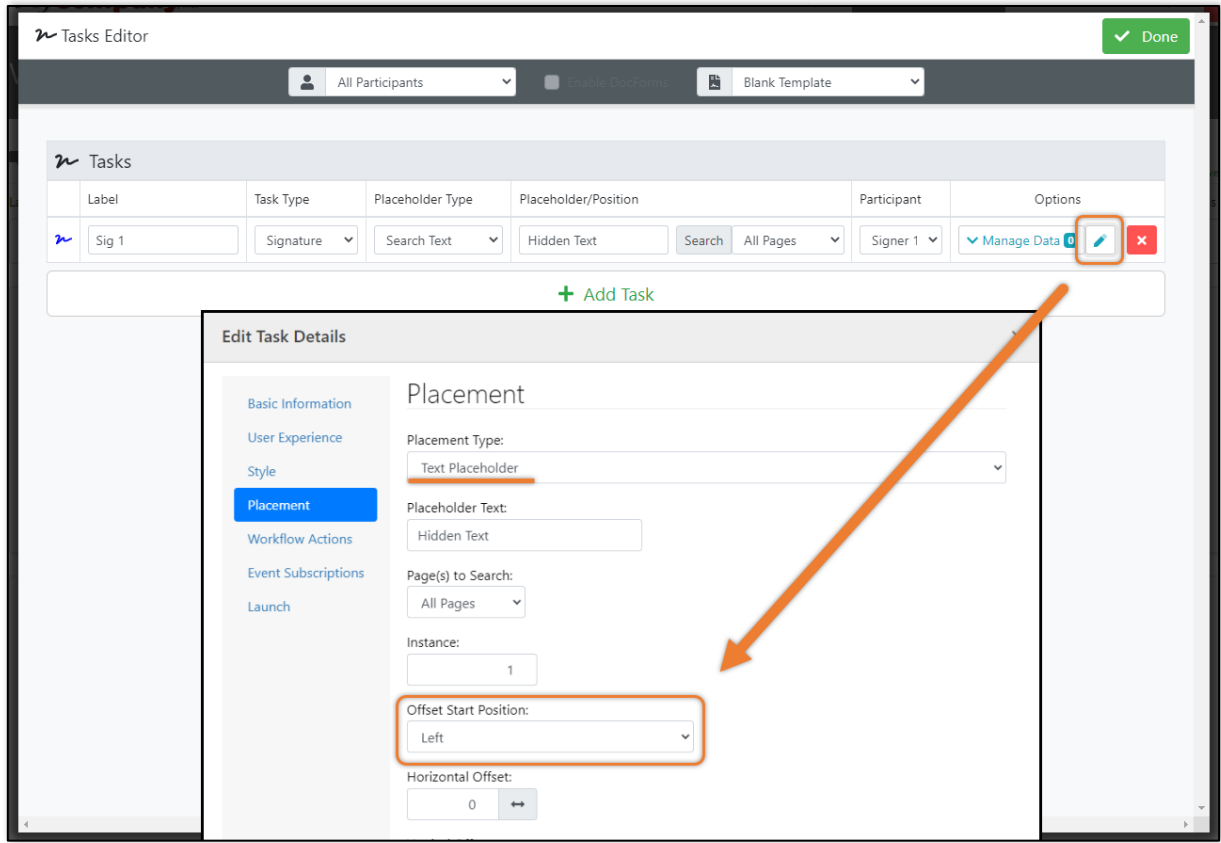
Save as Preset

Cancel

Update Workflow

[PEP-6249] - Fixed issue where the Offset Start Position drop-down should have a default value set to *Left* but was blank. Please see the image below for more details.

Release Notes



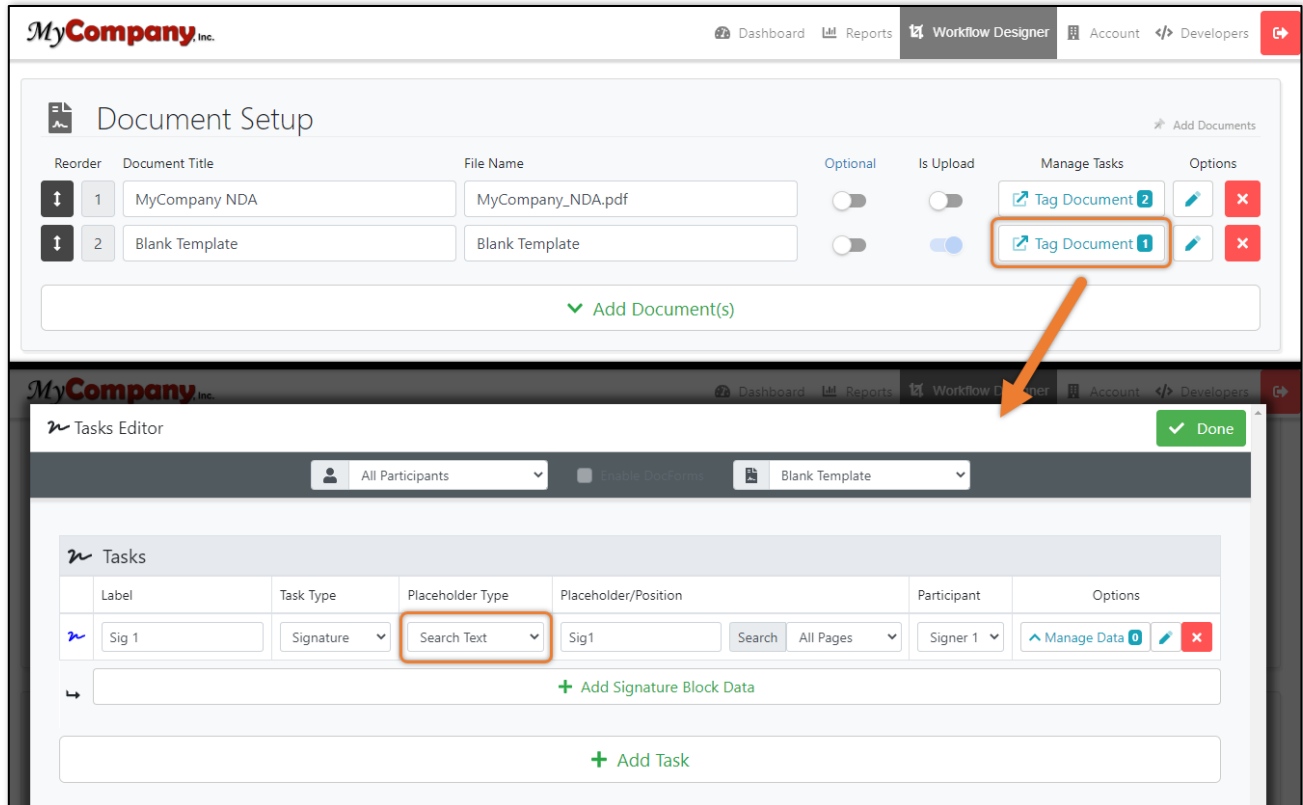
v5.16.1.5 Release

Production Release Date: 4/6/2023

Bug Fixes

[PEP-6483] - Fixed issue where when utilizing the Search Text functionality the signature would not be placed in the correct location on a document. Please see the image below for the settings referenced.

Release Notes



v5.16.1.4 Release

Production Release Date: 3/17/2023

Bug Fixes

[PEP-6431] - Fixed issue where some text characters weren't being found when using the search text signature placement method when creating transactions.

[PEP-6427] - Fixed issue where duplicate fields on documents were being incorrectly omitted from the DocForms page when signing.

[PEP-6419] - Fixed issue where when using FormField_InstanceOfField property for signature placement some signatures would not be placed on the document correctly.

v5.16.1.3 Release

Production Release Date: 3/8/2023

Bug Fixes

[PEP-6413] - Fixed issue to accommodate documents containing signatures or all required text fields.

v5.16.1.2 Release

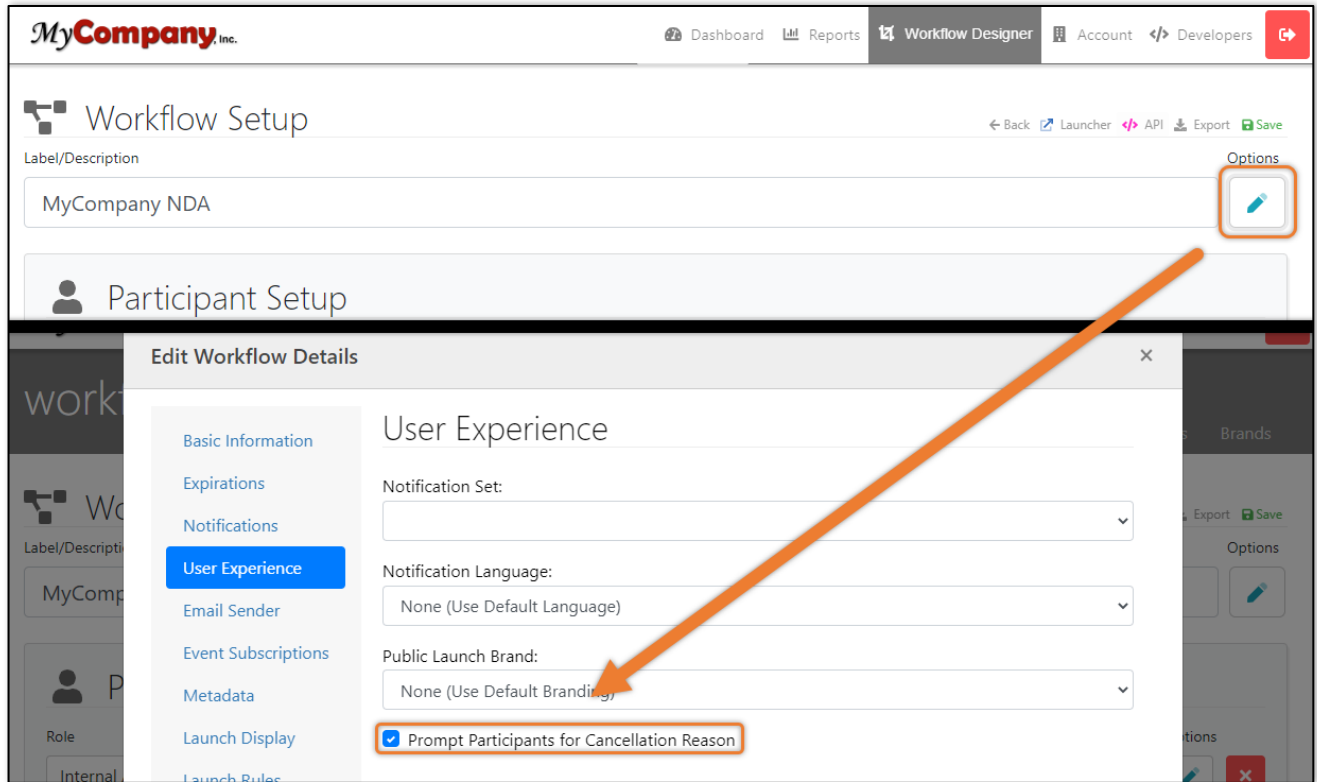
Production Release Date: 3/5/2023

Bug Fixes

[PEP-6399] - Fixed issue where if a workflow had a no action task as the first item, the system would not properly move forward to complete the signing process and the user would get stuck on a blank screen.

[PEP-6397] - Fixed issue where a participant cancel comments would not properly save to the LastComment object in the database. Please see the cancel behavior setting referenced in the image below.

Release Notes



[PEP-6388] - Fixed issue where when uploading a document to a Workflow with all fields required, fields would not be imported properly. None of the fields would appear on the document during the signing process. The fields should have appeared on the document for the participants to enter information and complete the signing process.

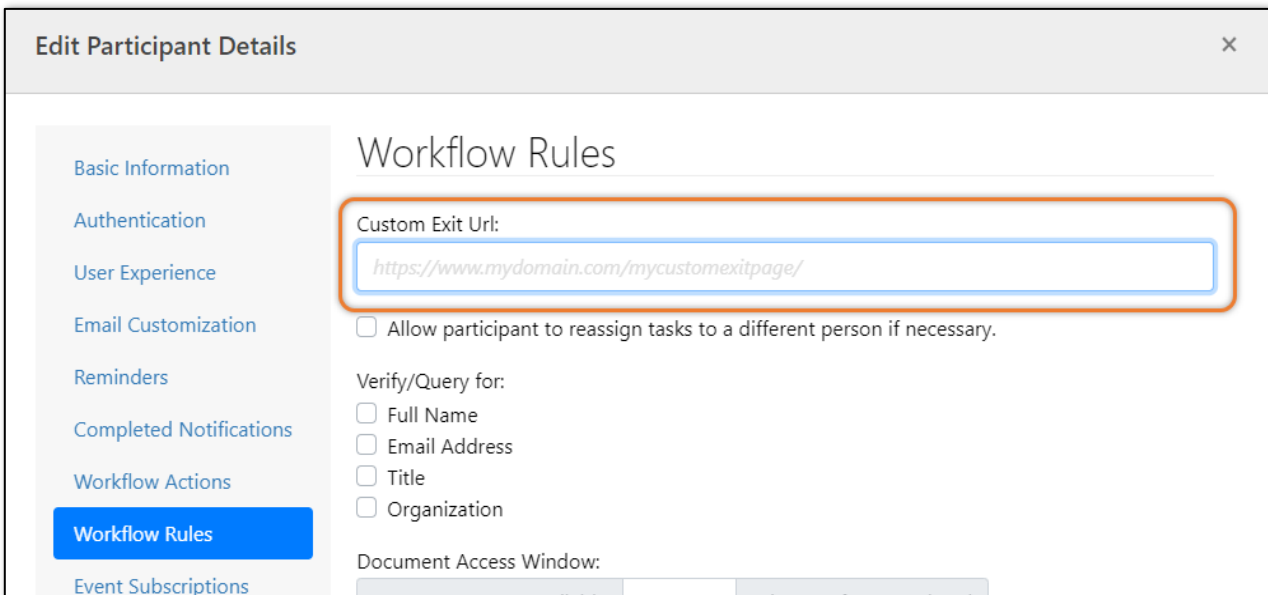
[PEP-6383] - Fixed issue where when uploading a document to a Workflow, DigitalSignature fields were not being imported properly nor recognized when tagging the document.

v5.16.1.1 Release

Production Release Date: 3/2/2023

Bug Fixes

[PEP-6387] - Fixed issue where upon completing a workflow with a custom Exit URL with capitals after the domain, the user would be incorrectly redirected to a lowercase URL instead. Example: "domain.com/Example" would be incorrectly changed to "domain.com/example". Please see the image below of the setting referenced.



Release Notes

[PEP-6381] - Fixed issue where comments were not properly rendering on Web Forms. Comments should be shown if entered. Please see the image below of examples of comments on a Web Form.

The screenshot displays the 'Web Form Editor' interface. On the left, a sidebar contains a 'Comment' section with a rich text editor (powered by TinyMCE) and a 'Place comment above field' checkbox. The main area shows a form with several fields: '1) Primary Beneficiary Name' (text input), '1) Primary Beneficiary Relationship to Insured' (dropdown), '1) Don't see the relationship option in the dropdown above? Please enter the relationship to the Insured:' (text input), '1) Primary Beneficiary Date of Birth' (date input), and '1) Primary Beneficiary Address' (text input). An orange arrow points from the 'Comment' section to the '1) Primary Beneficiary Name' field, indicating that comments are now properly rendered on the form. The form also includes a 'Save' button and a 'Done' button in the top right corner.

[PEP-6380] - Fixed issue where cancelling a transaction with a custom URL would not properly cancel nor redirect as expected.

v5.16.1 Release

Production Release Date: 3/2/2023

Bug Fixes

[PEP-6347] - Fixed issue where upon cancelling users were not shown the options to choose to either cancel or suspend the transaction when the cancel behavior was set to "Prompt Participant to choose status". Please see the setting referenced in the image below.

Release Notes

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domains

Launch Labels

User Experience

Brand:

None (Use Default Branding)

Content Set:

None (Use Default Content Set)

Notification Set:

None (Use Default Notification Set)

Notification Language:

None (Use Default Language)

Document/Task Status Page:

Display before each Document if multiple Documents

Completed Document Behavior

Redirect to next Document or Exit URL

Cancel Behavior:

Prompt Participant to choose status

Error Behavior:

Redirect directly To Exit page URL

[PEP-6329] - Fixed issue where if a participant has a custom exit URL set, any delivery task would not complete and stay in a Pending status. Please see the images below of the settings referenced.

Tasks Editor

Done

Jane Doe

Enable DocForms

MyCompany NDA

Task Placement

Signature

Initials

Approval

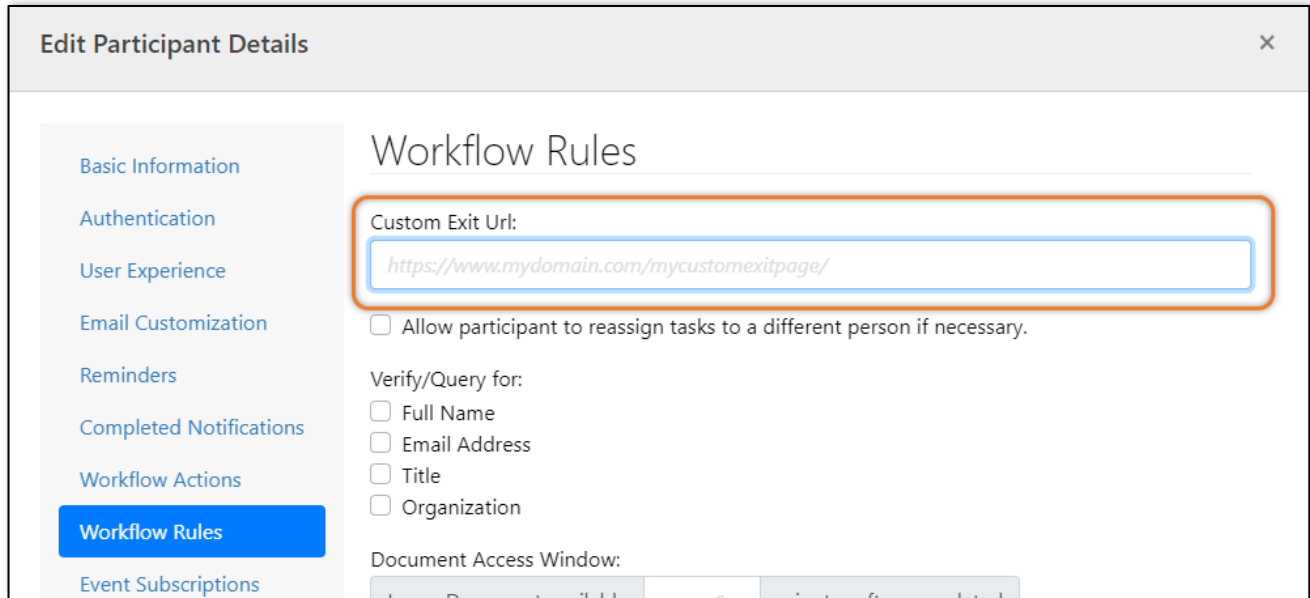
Delivery

Carbon Copy

Lorem ipsum dolor sit amet, consectetur adipiscing elit

Vivamus commodo lacinia mollis. Aenean ut tellus vestibulum, molestie urna eu, facilisis eros. Quisque aliquam, nisi sit amet pretium posuere, sapien ex eleifend lacus, a pellentesque lectus velit sit amet

Release Notes



Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Workflow Rules

Custom Exit Url:

<https://www.mydomain.com/mycustomexitpage/>

☐ Allow participant to reassign tasks to a different person if necessary.

Verify/Query for:

☐ Full Name

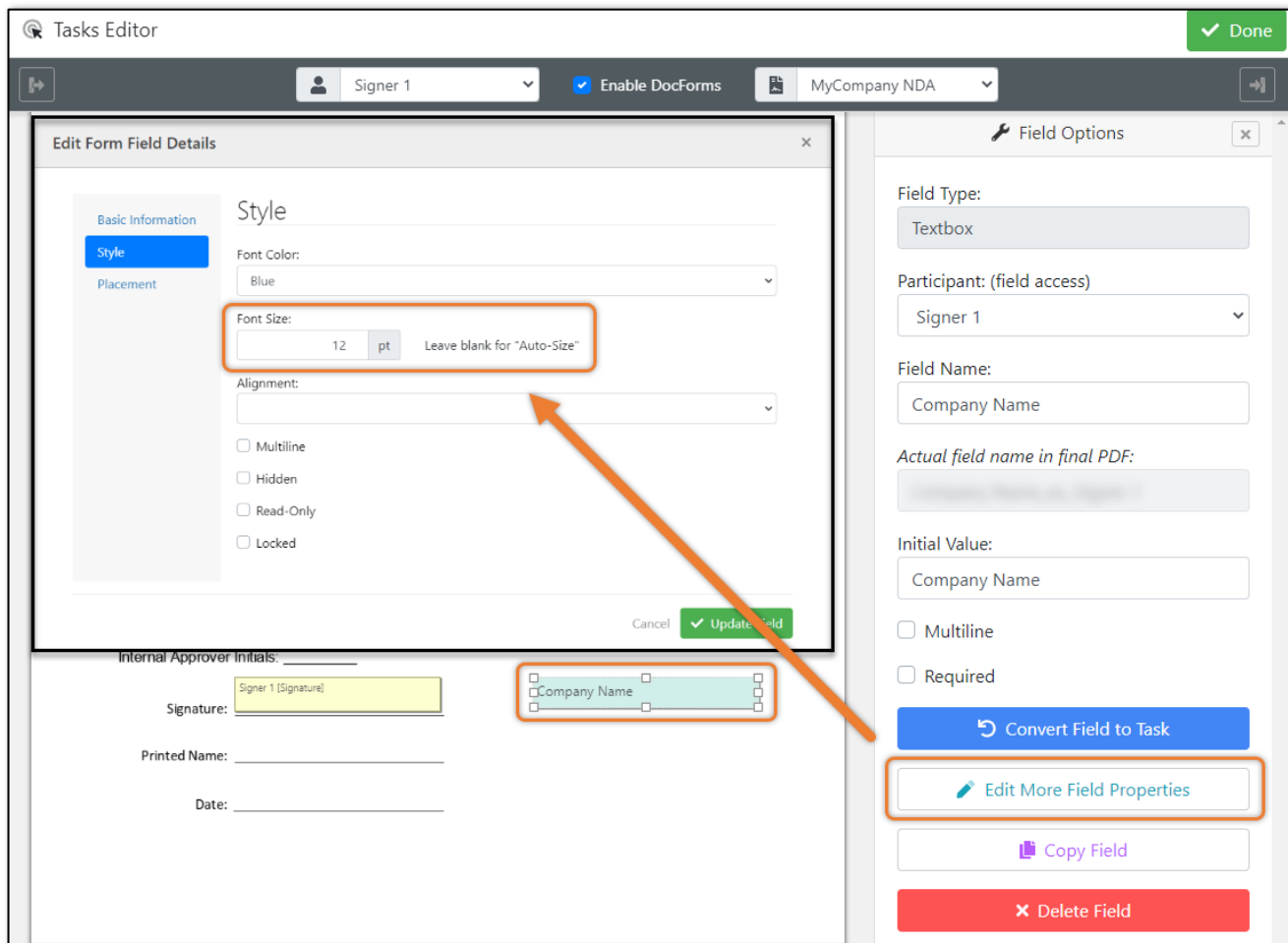
☐ Email Address

☐ Title

☐ Organization

Document Access Window:

[PEP-6303] - Fixed issue where DocForm fonts during signing were being ignored in the final Document. The font size in the DocForm will now properly match the font size as styled from the control panel. Please see the example font size setting for a textbox in the image below.



Tasks Editor

Signer 1

Enable DocForms

MyCompany NDA

Edit Form Field Details

Basic Information

Style

Placement

Font Color: Blue

Font Size: 12 pt Leave blank for "Auto-Size"

Alignment:

☐ Multiline

☐ Hidden

☐ Read-Only

☐ Locked

Cancel Update Field

Field Options

Field Type: Textbox

Participant: (field access) Signer 1

Field Name: Company Name

Actual field name in final PDF:

Initial Value: Company Name

☐ Multiline

☐ Required

Convert Field to Task

Edit More Field Properties

Copy Field

Delete Field

[PEP-6298] - Fixed issue where the Process Explanation screen would not display the correct tasks for each document in a transaction. Please see the referenced settings and example Process Explanation screen below.

Release Notes

E-Signature Process Explanation

Thank you for agreeing to sign your document online. This fast, safe and secure process will permit you to review your document and sign online with a legally valid electronic signature.

This process consists of the following steps:

1. Document: MyCompany NDA

- Test Completion Web Form
- Additional Document Upload
- Apply your Electronic Signature to the document

You will have a chance to review the final document and then apply your electronic signature. You will be able to download a signed copy of the agreement after signing.

[Continue](#)

Edit Participant Details

Preset: -- Apply a Preset -- Manage Presets

Workflow Actions

Action 1 ✖ Delete

Type: Process Explanation

[Add Workflow Action](#) ☐ Show Advanced

[PEP-6286] - Fixed issue where when attempting to update Signature Block Data, changes would not save. When using the "Edit More Data Item Properties" modal to edit a Signature Block Data element the element will now properly update and save. Please see the example *Printed Name* Signature Block Data in the image below for more details.

Tasks Editor ✓ Done

Signer 1 ☒ Enable DocForms MyCompany NDA

Edit Signature Block Data Details

Style

Font: Helvetica

Color: Black

☐ Bold ☐ Italic ☐ Auto-fit signatures inside signature field dimensions.

[Update Data](#) [Cancel](#)

Sig Block Data Options

Data Type: Printed Name

Font: Helvetica

Color: Blue

[Edit More Data Item Properties](#)

[Copy Data Item](#)

[Delete Data Item](#)

Internal Approver Initials: _____

Signature: Signer 1 (Signature)

Printed Name: Printed Name

Release Notes

[PEP-6280] - Fixed issue where the web form test pages API URLs were incorrect. Please see the image below of an example Web Form and test API URLs for more details.

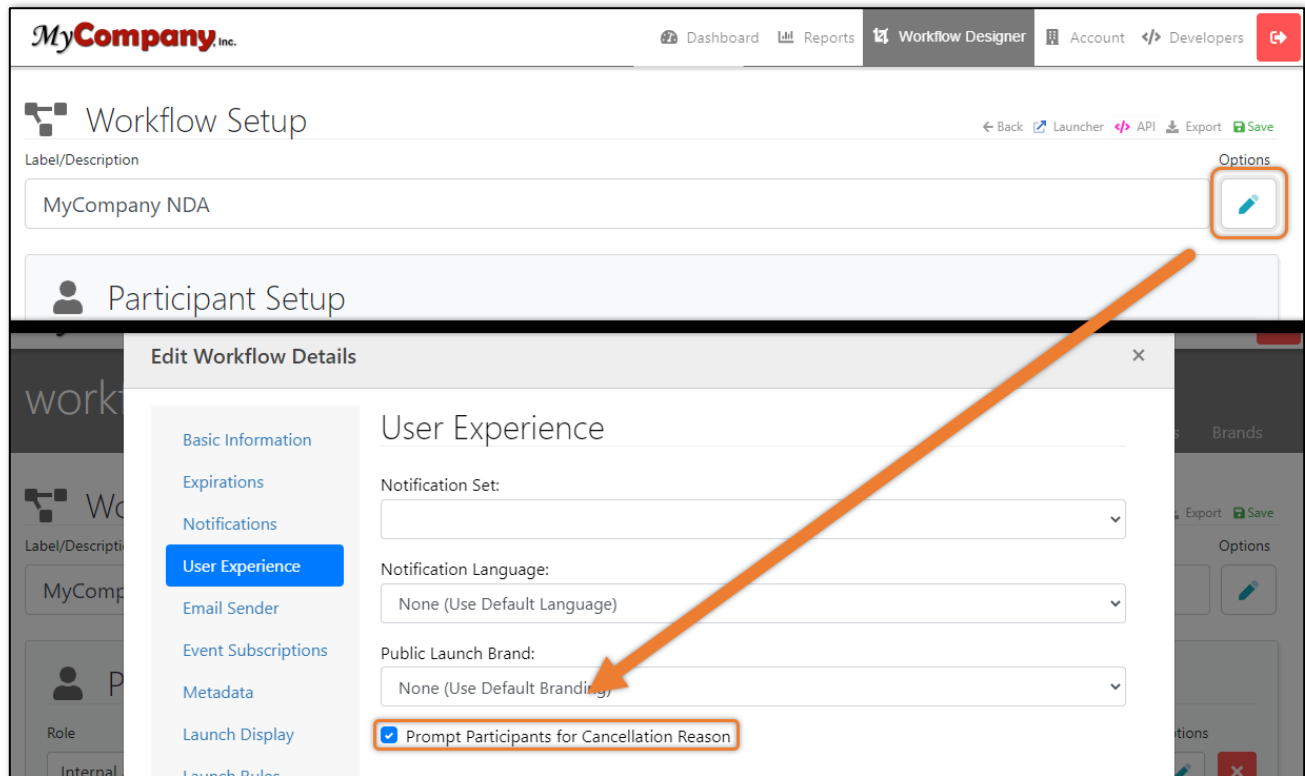
The screenshot shows the 'MyCompany' workflow designer interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header displays 'workflow designer / web forms'. Below this, there are tabs for 'Workflows', 'Web Forms', 'Documents', 'Content', 'Notifications', and 'Brands'. A search bar and a 'Group Web Forms' dropdown are present. A table lists web forms, with 'My Untitled Form' selected. To the right of the table, there are icons for 'Test Web Form', 'Edit', 'Duplicate', and 'Delete'. Below the table, a yellow box contains the text: 'You are currently in "Test Mode". Please fill out and submit the form to see PDF merge information at the bottom of this page.' Below this, a section titled 'Live URL for API Usage:' contains two URLs: 'For Participant Workflow Actions: https://uat.alphatrust.com/sign/participant-action/web-form?id=c84ffbee-e451-34ee-ca28-30e6338a5384' and 'For Task Workflow Actions: https://uat.alphatrust.com/sign/task-action/web-form?id=c84ffbee-e451-34ee-ca28-30e6338a5384'. An orange arrow points to the 'Test Web Form' icon in the table. Below the URLs, the title 'Untitled Form' is displayed, followed by the text 'This is my form. Please fill it out.'

[PEP-6278] - Fixed issue where if a participant cancels on an optional task, the participant is taken to the Exit page and the transaction status is changed to Pending. The Participant should be taken to the next task instead of the Exit page. Please see the optional task setting referenced in the image below.

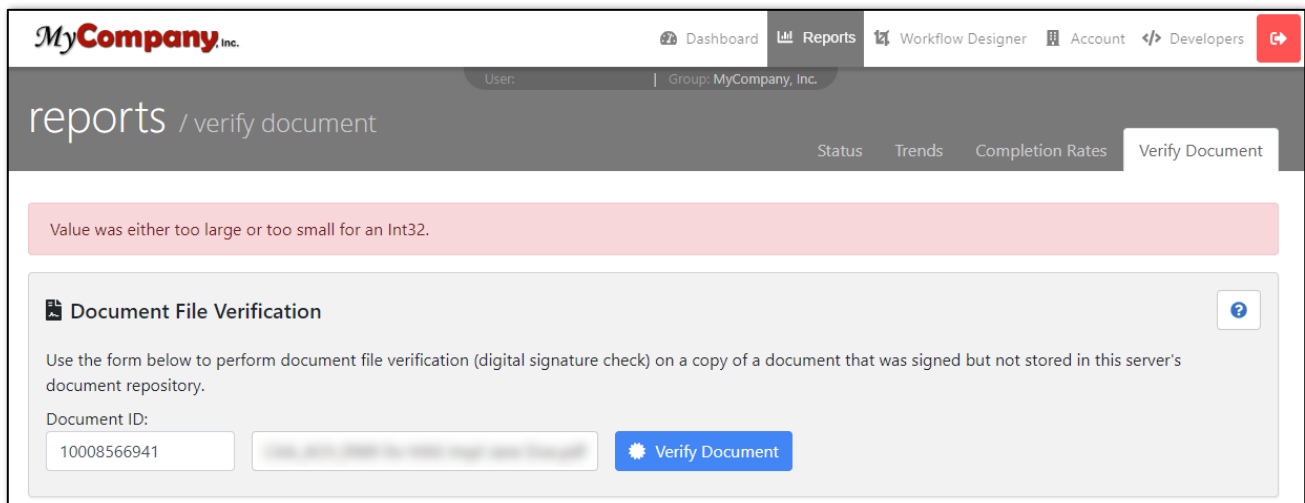
The screenshot shows the 'MyCompany' Document Setup and Tasks Editor interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header displays 'Document Setup'. Below this, there are fields for 'Document Title' (MyCompany NDA) and 'File Name' (MyCompany_NDA.pdf). There are also buttons for 'Is Upload', 'Manage Tasks', and 'Options'. The 'Manage Tasks' button is highlighted with an orange box. Below the 'Document Setup' section, there is a 'Tasks Editor' section. The 'Tasks Editor' section has a 'Done' button and a 'Task Options' dropdown. The 'Task Options' dropdown is open, showing 'Task Type: Initials', 'Label:', 'Actual field name in final PDF:', 'Participant: Jane Doe', 'Application Type: Font-Stamped (Default)', and 'Optional' (checked). An orange arrow points from the 'Manage Tasks' button to the 'Optional' checkbox.

Release Notes

[PEP-6277] - Fixed issue where if the cancel behavior is set to prompt for the cancellation reason, after the participant selects to cancel a task, the participant is not prompted for the cancellation reason and moves to a suspended status. The participant should be prompted for the cancellation reason if the cancel behavior is set to do so. Please see the cancel behavior setting referenced in the image below.

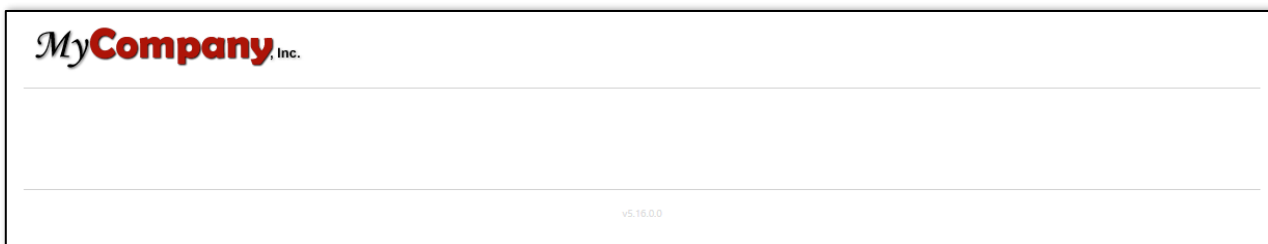


[PEP-6242] - Fixed issue where if the Document ID entered for document verification had one extra digit an error and success message would display simultaneously on screen. The error message should be the only message that appears on screen. Please see the example image below.



[PEP-6233] - Fixed issue where a Participant would see a blank screen with a logo after signing. The screen would go on to the correct next page, but the blank screen should not be seen. This was fixed by adding in a loading spinner and a prefetch on external exit screens to try and make the process more performant. Please see the example screen a Participant would see below.

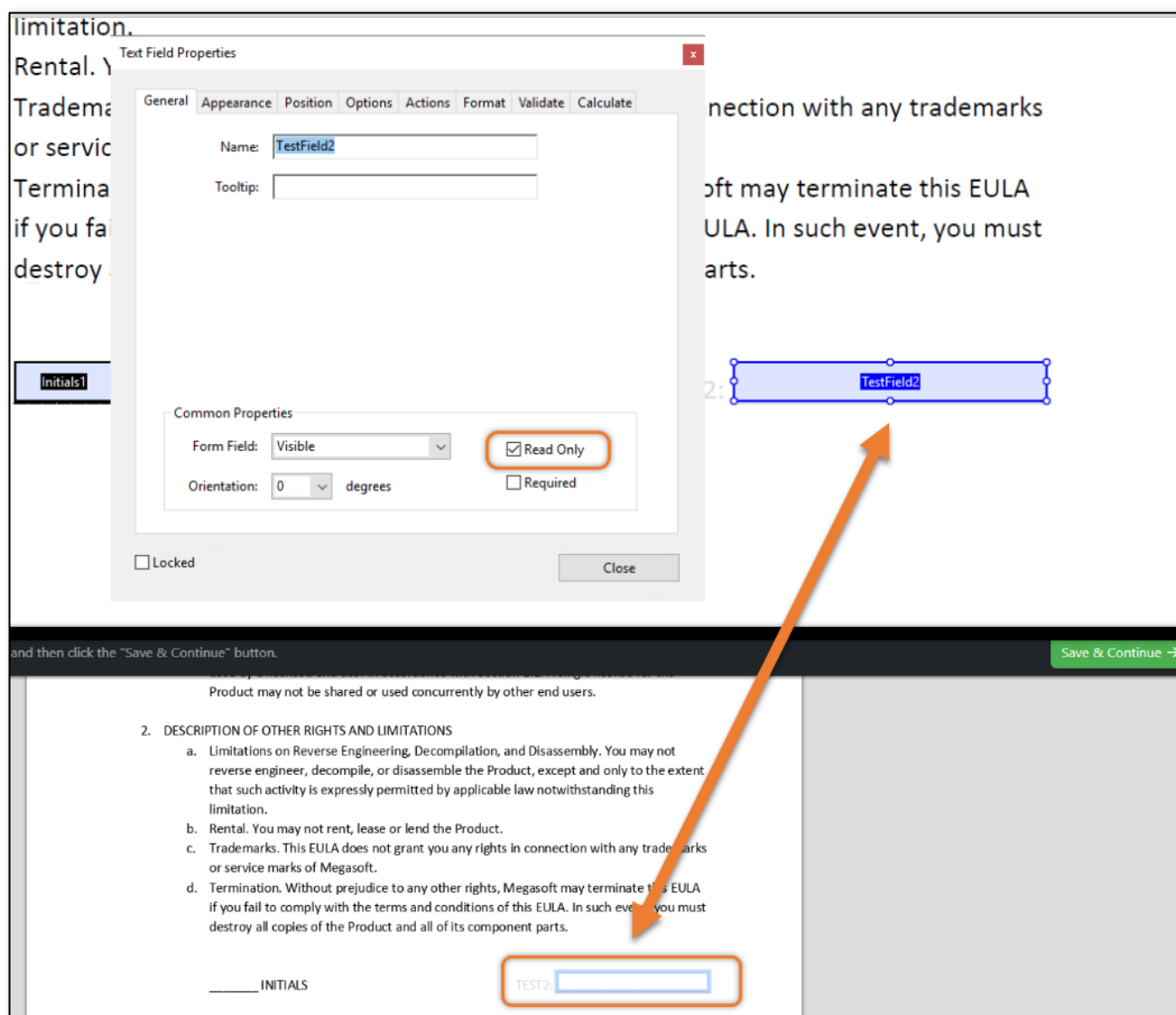
Release Notes



[PEP-6215] - Fixed issue where signing sessions would not properly expire if you started another one.

[PEP-6156] - Fixed issue where outgoing email templates sometimes caused emails to be flagged as spam. Updated the email notifications to include proper HTML and a plain text alternative view in the sent emails.

[PEP-6093] - Fixed issue where when adding a PDF with a read-only DocForm field, the field would not be read-only and could be edited by the participant. Please see the example image below for more details.



v5.16.0.2 Release

Production Release Date: 2/24/2023

Bug Fixes

[PEP-6355] - Fixed issue where the incorrect Participant IP address was being recorded and logged on the Audit Report.

Release Notes

v5.16.0.1 Release

Production Release Date: 2/23/2023

Bug Fixes

[PEP-6336] - Fixed issue where when a participant defines another participants' mobile authentication, it would not save the details correctly. Please see the setting referenced in the image below.

Edit Participant Details [X]

Workflow Actions

Action 1 [Delete]

Type: Define Another Participant

Participant to Define: Signer 2

- ☒ Full Name [options]
- ☒ Email Address [options]
- ☐ Phone Number
- ☐ Title
- ☐ Organization
- ☒ Authentication [options]
- ☐ Two-Factor Authentication
- ☐ Custom Email Message
- ☐ Customize Page Content

[Add Workflow Action] [Show Advanced]

v5.16.0 Release

Production Release Date: 2/23/2023

Important Notes:

The following items are considered breaking changes.

- [PEP-5350]-Twilio Authy was Removed as an integration option as it was deprecated by Twilio. If your team utilizes Twilio Authy for Mobile Authentication, it will no longer work and will need to be updated to Twilio SMS or Verify.

New Features

[PEP-5928] - Added the ability to submit document form fields via the Bulk Launch feature. An example form field and CSV legend can be seen in the images below for more details.

Release Notes

Tasks Editor

Any Participant

Enable Doc Forms

NDA JH1

Done

Field Options

Field Type:
Textbox

Participant: (field access)
Any Participant

Field Name:
Approval Date

Initial Value:
xx/xx/xxxx

☐ Multiline

☐ Required

Edit More Field Properties

Copy Field

Delete Field

Signature: [Signature_es_Signer 1]

Printed Name: [Printed Name_es_Signer 1]

xx/xx/xxxx

dashboard / workflow templates launch

Quick StatsWorkflow Templates LaunchPending Signatures

Sample Workflow

Upload CSV File

Upload CSV: Browse for file...

Send Bulk Launch

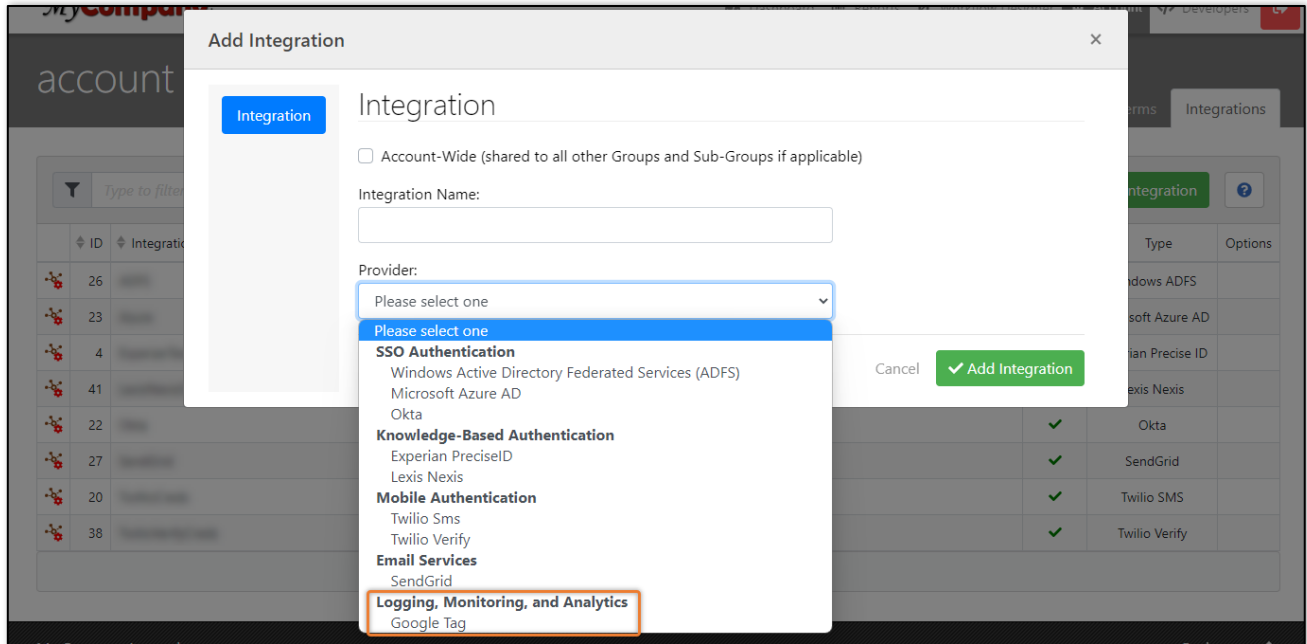
Below is the legend for how the spreadsheet should be completed. Please fill out the spreadsheet and upload it to launch the workflows in bulk.

Column	Name	Type	Required
A	FullName	Participant	Yes
B	EmailAddress	Participant	Yes
C ...	[field name here]	Document	No

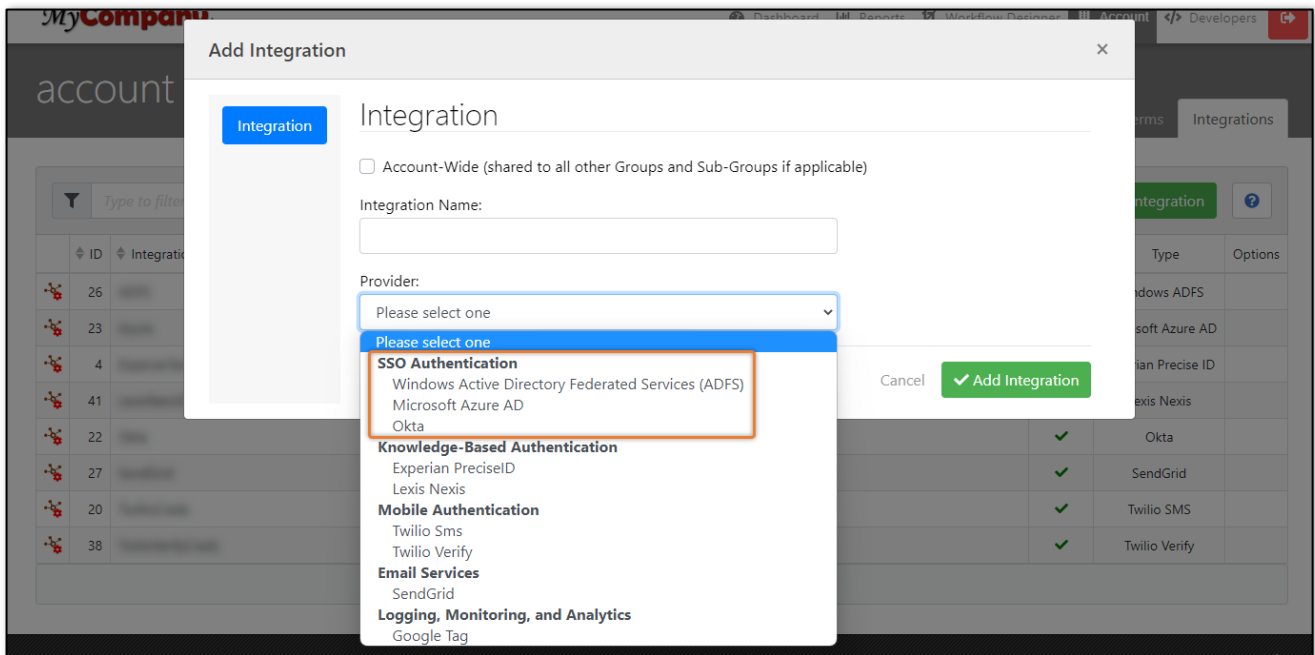
Download Launch Template CSV

[PEP-5346] - Replaced the drop-in Analytics.htm functionality with official Google Tag Integration to support downstream Google Tag-enabled services (e.g. Google Analytics, etc.). Please see the image below for more details.

Release Notes



[PEP-5288] - Implemented ADFS, Azure, and Okta SSO for the new Signing UI. Please see the image below for more details.



[PEP-4977] - Created a new documentation website for developers to facilitate improved discovery and access to information. New Website: <https://developers.alphatrust.com/>. Note: Old website link will redirect to the new website.

[PEP-4096] - Made improvements to the HTML Document Type Signing UI to be more consistent with the pdf Signing UI.

[PEP-3870] - Created a new modernized Signing UI to increase the overall performance of a user's signing experience. The upgraded components will also reduce the frequency of PDF validation errors as a result.

Improvements

[PEP-5779] - Changed the max characters for Workflow Action URLs from 512 to 2083. Please reference the image below for more details.

Release Notes

The screenshot shows the 'Edit Participant Details' dialog box with the 'Workflow Actions' tab selected. The 'URL' field is highlighted with an orange border. The 'Type' is set to 'Custom'. The 'Label' field contains the text 'Description visible to Participants'. The 'Data' field contains the text 'Action Data'. There is a green 'Add Workflow Action' button and a 'Show Advanced' checkbox. At the bottom, there are 'Save as Preset', 'Cancel', and 'Update Participant' buttons.

[PEP-5350] - Removed Twilio Authy as an integration option as it was a form of second-factor authentication that has been deprecated by Twilio. Please reference the image below for more details.

The screenshot shows the 'Add Integration' dialog box. The 'Provider' dropdown menu is open, showing options under 'Mobile Authentication'. The 'Twilio Verify' option is highlighted with an orange box. The 'Add Integration' button is green and visible at the bottom right.

[PEP-5297] - Added additional Search Filter options (*Entity Type*) in the Status Reports. Please see the image below for an example of the search filter *Entity Type* referenced.

Release Notes

The top screenshot shows the 'reports / status' page with a search bar and a dropdown menu. The dropdown menu is open, showing options: Transactions, Documents, Participants, Tasks, and Everything. The search bar contains the text 'Search by Transaction ID or'. The date range is '2022-01-01 ~ 2022-09-13'. The status is 'Any Status'. The search button is 'Search'. The advanced button is 'Advanced'. The table below shows a single row with the following data:

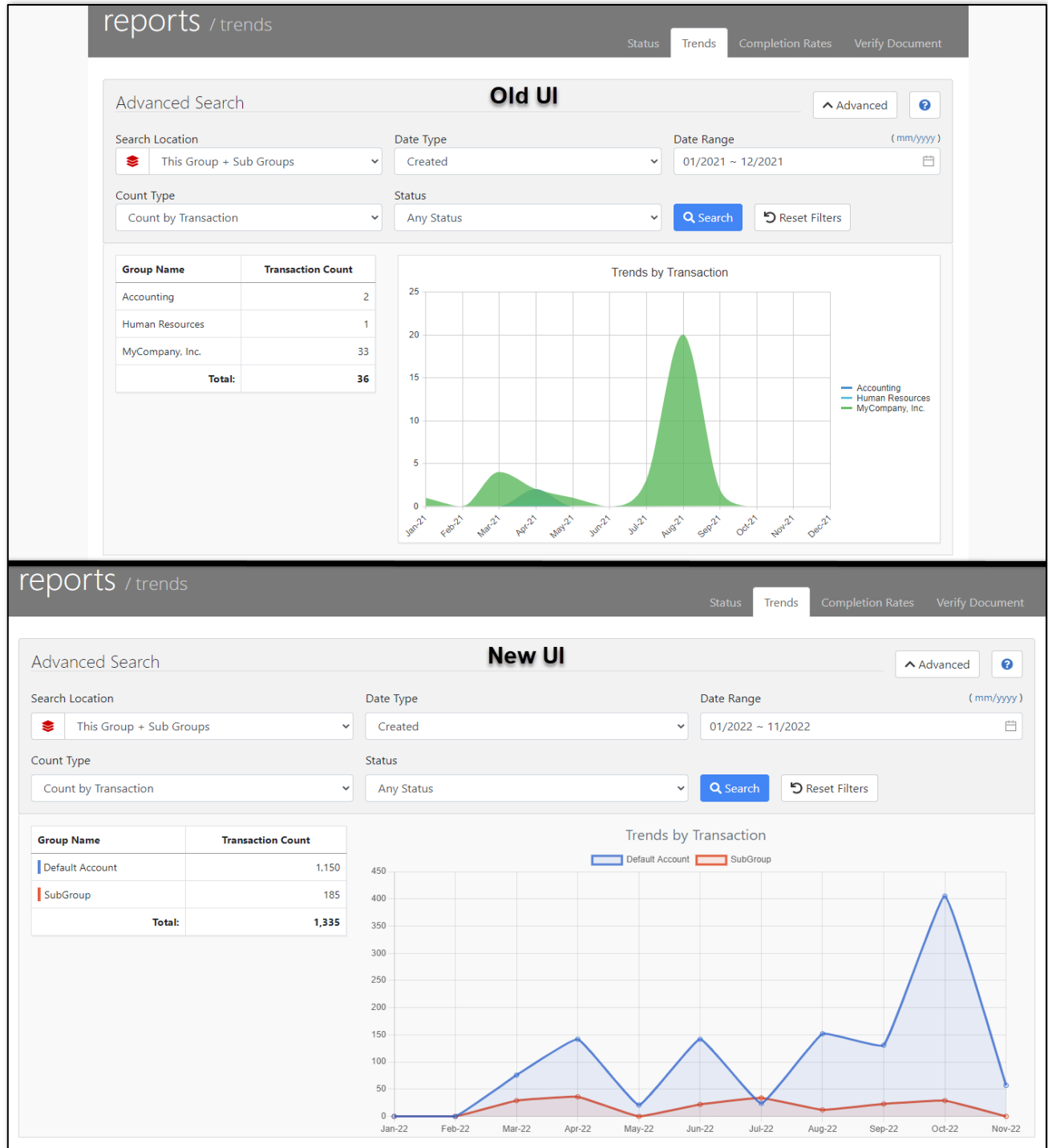
Transaction ID	Created Date	Status	Closed Date	Options
2022-09-13 06:37 PM UTC	Completed	2022-09-13 06:38 PM UTC		

The bottom screenshot shows the 'Advanced Search' section. The search bar contains the text 'Search by Transaction ID or description...'. The date range is '2022-01-01 ~ 2022-09-13'. The status is 'Any Status'. The date type is 'Created'. The search button is 'Search'. The advanced button is 'Advanced'. The table below shows a single row with the following data:

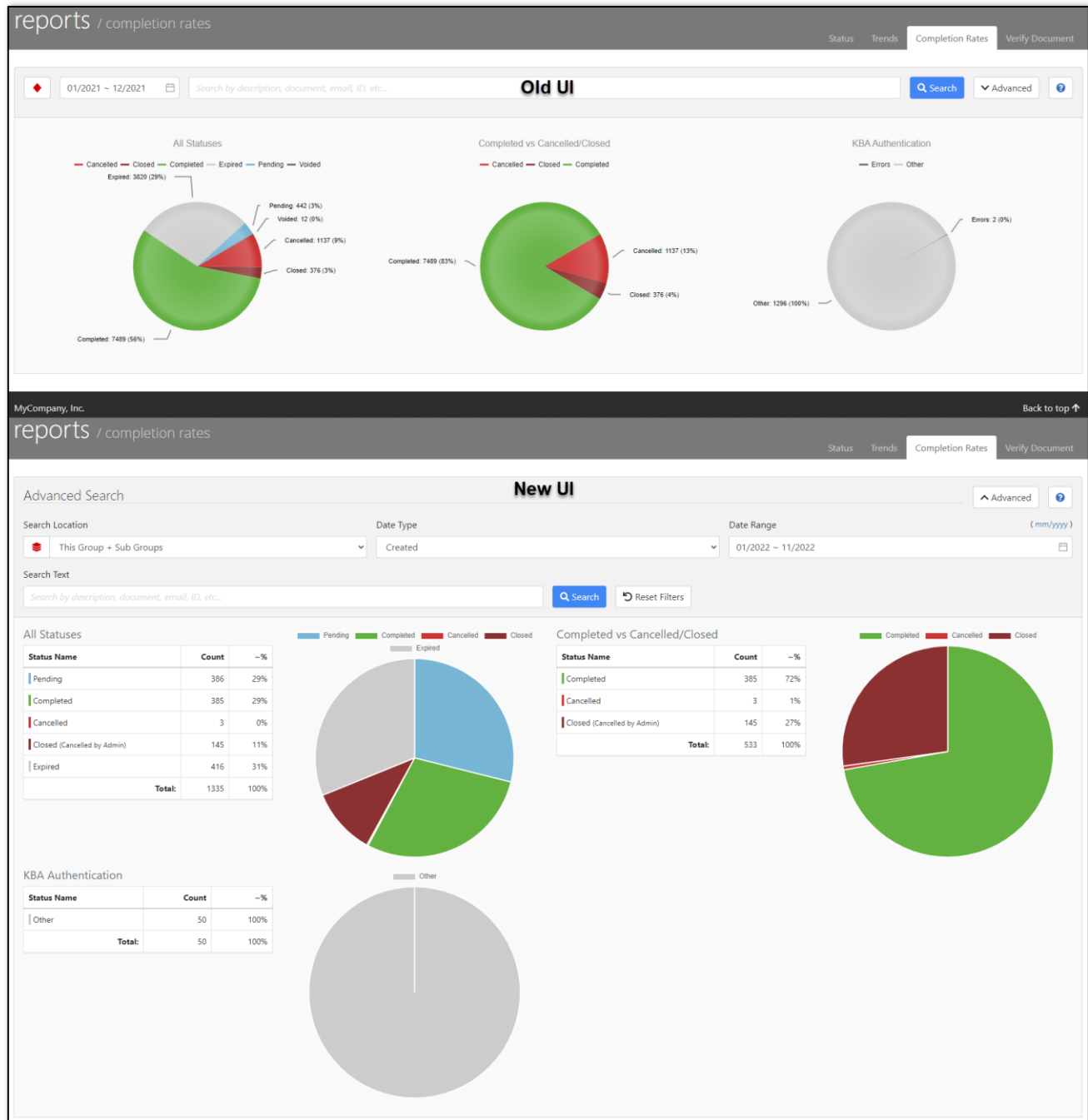
Transaction ID	Description	Created Date	Status	Closed Date	Options
2022-09-13 06:37 PM UTC	Privacy Policy	Completed	2022-09-13 06:38 PM UTC		

[PEP-5278] - Made minor UI/UX improvements on the Trends and Completion Rates Reports. Please reference the images below for more details.

Release Notes



Release Notes



[PEP-4830] - Removed Authentication Requirement for RemoteSign() API. It now supports Password, Registered, and None. Please view the Signing Remotely developers article below for more information.

<https://developers.alphatrust.com/documentation/tasks/signing-remotely.html>.

Bug Fixes

[PEP-6012] - Fixed issue where when using the Bulk Launch feature, an email string could incorrectly have double quotations around the custom email message content. An example image of the CSV legend and issue can be seen below.

Release Notes

dashboard / workflow templates launch

Quick Stats

Workflow Templates Launch

Pending Signatures

Testing

[← Back](#) [Single Launch](#) [Test](#) [Edit](#)

Upload CSV File

Upload CSV:

Browse for file...

Send Bulk Launch

Below is the legend for how the spreadsheet should be completed. Please fill out the spreadsheet and upload it to launch the workflows in bulk.

Column	Name	Type	Required
A	FullName	Participant	Yes
B	EmailAddress	Participant	Yes
C	CustomEmailMessage	Participant	No
D	AdditionalNotificationEmails	Workflow	No

Download Launch Template CSV

Action Required

Action is required on the following electronic document(s) that have been prepared for your review/signature.

"Hello Jane, Thank you for your interest in our product!"

Quotes should not appear around
the custom email message

Document Information:

• Test Document

• Sample Document1

Access Your Electronic Document(s)

If you are having issues accessing the transaction by clicking on the button above, please try copying the entire link shown below and pasting it into your internet browser's address bar instead.

[PEP-6008] - Fixed issue where events were not being logged in the Event History for the new Signing UI. Increased logging for new Signing UI transactions.

[PEP-5944] - Fixed issue where the public launch page would not pull in custom branding or content from either the workflow or the group settings. Please see the settings referenced in the images below.

Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Launch Rules

☒ Publish this Workflow as launchable template.

☒ Allow users in this Group to launch this Workflow.

☐ Allow users in all Sub Groups in this account to launch this Workflow.

☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.

☒ Allow this Workflow to be launched publicly with no authentication required.

☐ Allow the launch form to use the full page width (default is centered).

☐ Allow the Description to be edited at the time of launch.

☐ Enable Bulk Launching

Bulk Launching is disabled if any of the following options are being used:

- The Workflow is a Public Launch type
- There are in-person participants
- The Launcher needs to fill out one or more WebForm at launch
- The Launcher needs to fill out one or more DocForms at launch

Save as Preset

Cancel

Update Workflow

Edit Participant Details

Preset: -- Apply a Preset --

Manage Presets

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domains

Launch Labels

User Experience

Brand: MyCompany

Content Set: None (Use Default Content Set)

Document/Task Status Page: Display before each Document if multiple Documents

Completed Document Behavior: Redirect to next Document or Exit URL

Cancel Behavior: Automatically leave in Pending status

Error Behavior: Redirect directly To Exit page URL

Document Options:

☒ Display document download(s) on the Exit page upon completion

☐ Allow access to all Transaction documents regardless of participation

Save as Preset

Cancel

Update Participant

Release Notes

Edit Group

Basic Information
Document Integrity
Security
Privacy Policy
User Experience
Logo
Multi-Factor Authentication
Email Services

User Experience

Brand: MyCompany

Content Set: -- Select One --

Notification Set: -- Select One --

Email Language: -- Use Default Language --

Cancel Update Group

[PEP-5815] - Fixed issue where a user would see an internal error message after uploading a Bulk Launch CSV file. The error message would appear due to the CSV file not containing the expected header row. Added validation to the Bulk Launch CSV file to ensure the file uploaded is valid file with the expected header row. Please see the image below of the Workflow setting referenced and an example CSV file header row for more details.

Edit Workflow Details

Basic Information
Expirations
Notifications
User Experience
Email Sender
Event Subscriptions
Metadata
Launch Display
Launch Rules
Launch Web Forms

Launch Rules

☒ Publish this Workflow as launchable template.
☒ Allow users in this Group to launch this Workflow.
☐ Allow users in all Sub Groups in this account to launch this Workflow.
☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.
☐ Allow this Workflow to be launched publicly with no authentication required.
☐ Allow the launch form to use the full page width (default is centered).
☐ Allow the Description to be edited at the time of launch.

☒ Enable Bulk Launching

Save as Preset Cancel Update Workflow

Document Setup

dashboard / workflow templates launch

Quick Stats Workflow Templates Launch Pending Signatures

Document(s) I need to sign...

Upload CSV File

Upload CSV: Browse for file...

Send Bulk Launch

Below is the legend for how the spreadsheet should be completed. Please fill out the spreadsheet and upload it to launch the workflows in bulk.

Column	Name	Type	Required
A	FullName	Participant	Yes
B	EmailAddress	Participant	Yes

Download Launch Template CSV

The expected header row that should be in the Bulk Launch CSV file


	A	B	C
1	FullName*	EmailAddress*	
2			
3			
4			

Release Notes

[PEP-5812] - Fixed issue where the Bulk Launch Status screen would hang and never update if a CSV file that only contained header row was used. Added CSV validation to ensure more than just a header row is in the CVS file used. Please see the images below of an example CSV with header row only and the Launch Status screen.

	A	B	C	D
1	FullName*	EmailAddress*		
2				
3				

Simple

Your bulk launch has been uploaded successfully and we are currently processing  Transactions. You may either wait for the Transactions to complete by monitoring the status below, or you may navigate away and return later to check your status. We have emailed you a link back to this page and we will also email you a second email to notify you that the processing has completed.

Bulk Launch Status

[← Back to Launch Form](#)[Edit Workflow](#)[Workflow Templates Launch](#)





[PEP-5775] - Fixed a typo in the Notifications placeholders. Changed “Participant First Namee” to “Participant First Name”. Please reference the image below for more details.

Notification Template Editor

Subject: Document Transaction Completed for {{PARTICIPANT_FULLNAME}}

Body:

Edit Insert Format Table Tools

B *I*    

Logo

Login Link

Transaction ID

Transaction Description

Participant Access Link

Participant ID

Participant Access Token

Participant Full Name

Participant First Name

Custom Message to Participant

Participant List (Bulleted)

Participant List (Comma Separated)

Document List (Bulleted)

Document List (Bulleted w/ IDs)

[[ACCOUNT_LOGO]]

Document Trans

It is recommended that you save any att

NOTE: The final document(s) may not b

Document Information: [[DOCUMENT

[[EMAIL_FOOTER]]

DIV

POWERED BY TINY

Update Notification Template

[PEP-5670] - Fixed issue where when using the Bulk Launch feature, the custom SendFromName and SendFromEmail would not be recognized and the system default SendFromName and SendFromEmail would be used. Please see the images below for an example of a SendFromName and SendFromEmail with Bulk Launch and the Workflow setting.

Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Email Sender

Sender Options:

Allow Launcher to manually enter From Name/Email

Save as Preset

Cancel

Update Workflow

Dashboard / workflow templates launch

Quick Stats

Workflow Templates Launch

Pending Signatures

Sample Workflow

Upload CSV File

Upload CSV:

Browse for file...

Send Bulk Launch

Below is the legend for how the spreadsheet should be completed. Please fill out the spreadsheet and upload it to launch the workflows in bulk.

Column	Name	Type	Required
A	FullName	Participant	Yes
B	EmailAddress	Participant	Yes
C	SendFromName	Workflow	No
D	SendFromEmail	Workflow	No
E ...	[field name here]	Document	No

Download Launch Template CSV

[PEP-5540] - Fixed issue where the Participant Setup and Final Email Notification toggle options such as *In-Person*, *Final Email*, and *Send If Completed* would not update correctly when sending a Sign & Send workflow. Please see the images below referencing to the affected Workflow type and toggles settings.

MyCompany, Inc.

Dashboard

Reports

Workflow Designer

Account

Developers

Workflow Designer / workflows

Workflows

Web Forms

Documents

Content

Notifications

Brands

Sign & Send

I need to sign documents and then send them to other recipients.

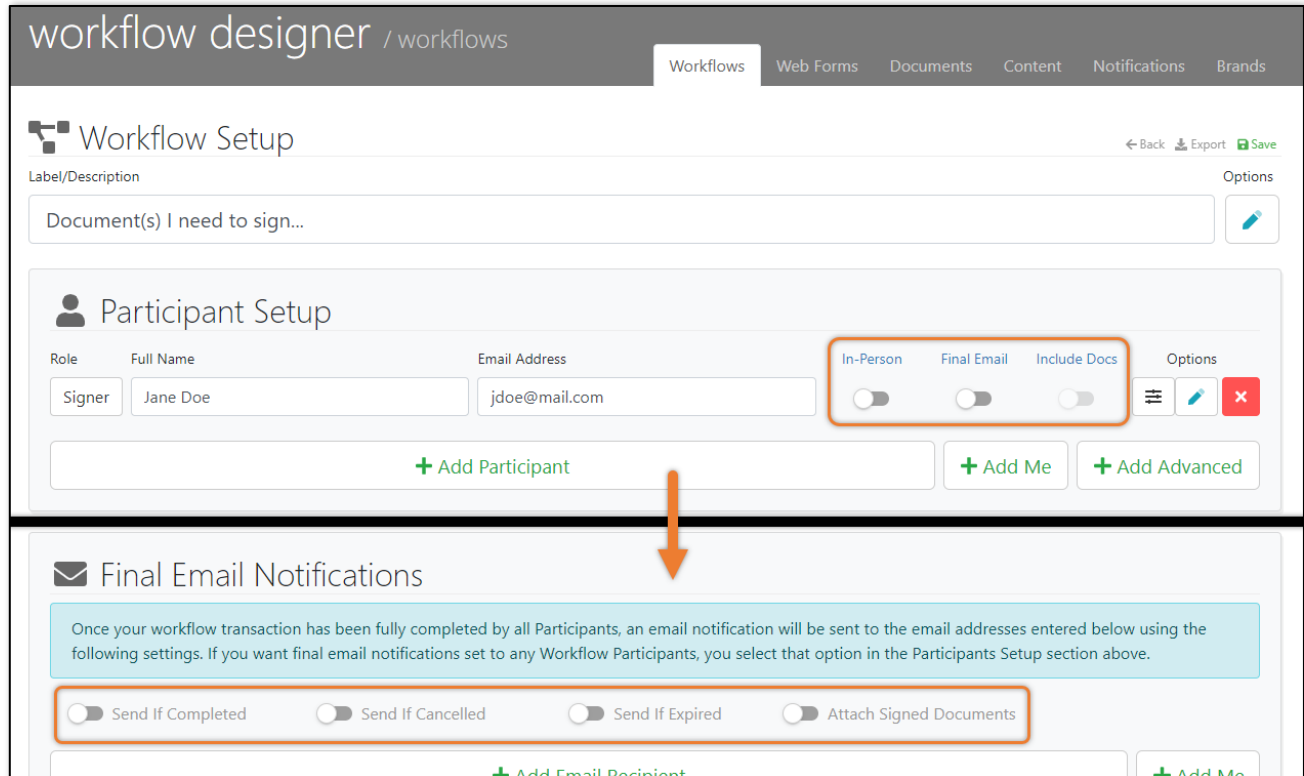
Send for Signature

I need to send out documents to others to sign and send them back to me.

Create a Template

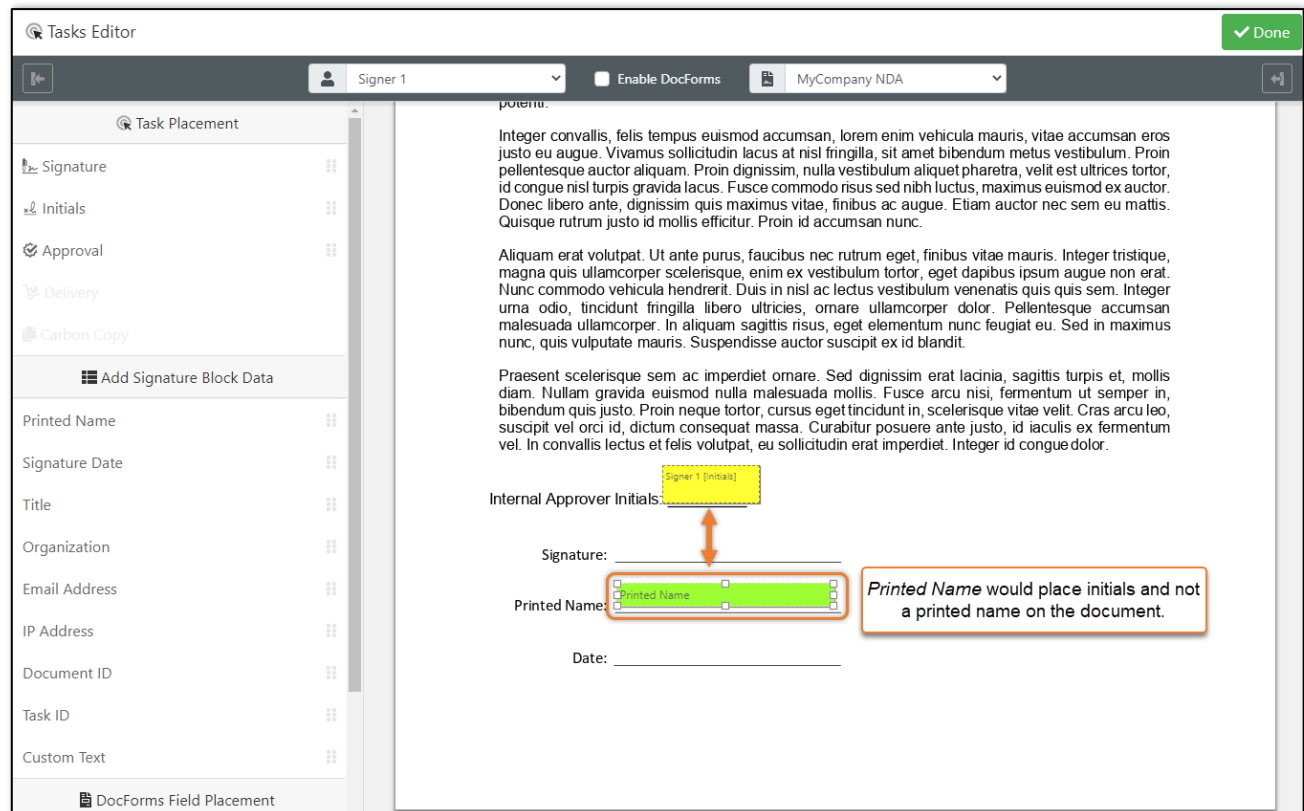
I want to create a re-useable Workflow template that can be launched multiple times.

Release Notes



The screenshot shows the 'Workflow Designer' interface. At the top, there's a navigation bar with 'workflows' selected. Below it, the 'Workflow Setup' section is active. A text field contains 'Document(s) I need to sign...'. The 'Participant Setup' section below it has a table with columns: Role, Full Name, Email Address, In-Person, Final Email, Include Docs, and Options. The first row shows 'Signer', 'Jane Doe', 'jdoe@mail.com', and three disabled toggle switches. An orange box highlights these three toggles. Below the table are buttons for '+ Add Participant', '+ Add Me', and '+ Add Advanced'. An orange arrow points from the 'Final Email' toggle to the 'Final Email Notifications' section below. This section has a blue informational box and four toggle switches: 'Send If Completed', 'Send If Cancelled', 'Send If Expired', and 'Attach Signed Documents'. An orange box highlights these four toggles. At the bottom are '+ Add Email Recipient' and '+ Add Me' buttons.

[PEP-5535] - Fixed issue where the *Printed Name* Block Data, relating to an *Initials* task, would appear as initials on the document when it should appear as a printed name. Please see the image below for more details.



The screenshot shows the 'Tasks Editor' interface. On the left is a 'Task Placement' sidebar with a list of tasks: Signature, Initials, Approval, Delivery, Carbon Copy, and 'Add Signature Block Data' (which is selected). Below this is a list of data fields: Printed Name, Signature Date, Title, Organization, Email Address, IP Address, Document ID, Task ID, and Custom Text. The main area shows a document preview for 'MyCompany NDA'. It contains several paragraphs of placeholder text. A yellow box labeled 'Signer 1 [Initials]' is placed over the text. Below it, the 'Internal Approver Initials:' field is shown. The 'Signature:' field has a green box labeled 'Printed Name' placed over it. An orange box highlights this 'Printed Name' box. To the right of this box is a text box containing the message: 'Printed Name would place initials and not a printed name on the document.' The 'Date:' field is at the bottom.

[PEP-5488] - Fixed issue where another user could take ownership of a Web Form and move it to a Sub-Group by editing and saving the Web Form.

Release Notes

[PEP-5486] - Fixed issue where when calling GetWorkflowLaunchRules() the Sub Group API credentials could not find any shared Workflows when they belonged to the Parent Group. The call should have returned information on shared Workflows that were owned by the Parent Group or Sub Group. Please see the Workflow settings referenced in the images below.

Edit Workflow Details

Launch Rules

- ☒ Publish this Workflow as launchable template.
- ☒ Allow users in this Group to launch this Workflow.
- ☒ Allow users in all Sub Groups in this account to launch this Workflow.
- ☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.
- ☐ Allow this Workflow to be launched publicly with no authentication required.
- ☐ Allow the launch form to use the full page width (default is centered).
- ☐ Allow the Description to be edited at the time of launch.
- ☐ Enable Bulk Launching

Bulk Launching is disabled if any of the following options are being used:

- The Workflow is a Public Launch type
- There are in-person participants
- The Launcher needs to fill out one or more WebForm at launch
- The Launcher needs to fill out one or more DocForms at launch

Save as Preset Cancel **Update Workflow**

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers

User: jdoe@mail.com | Group: MyCompany, Inc.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

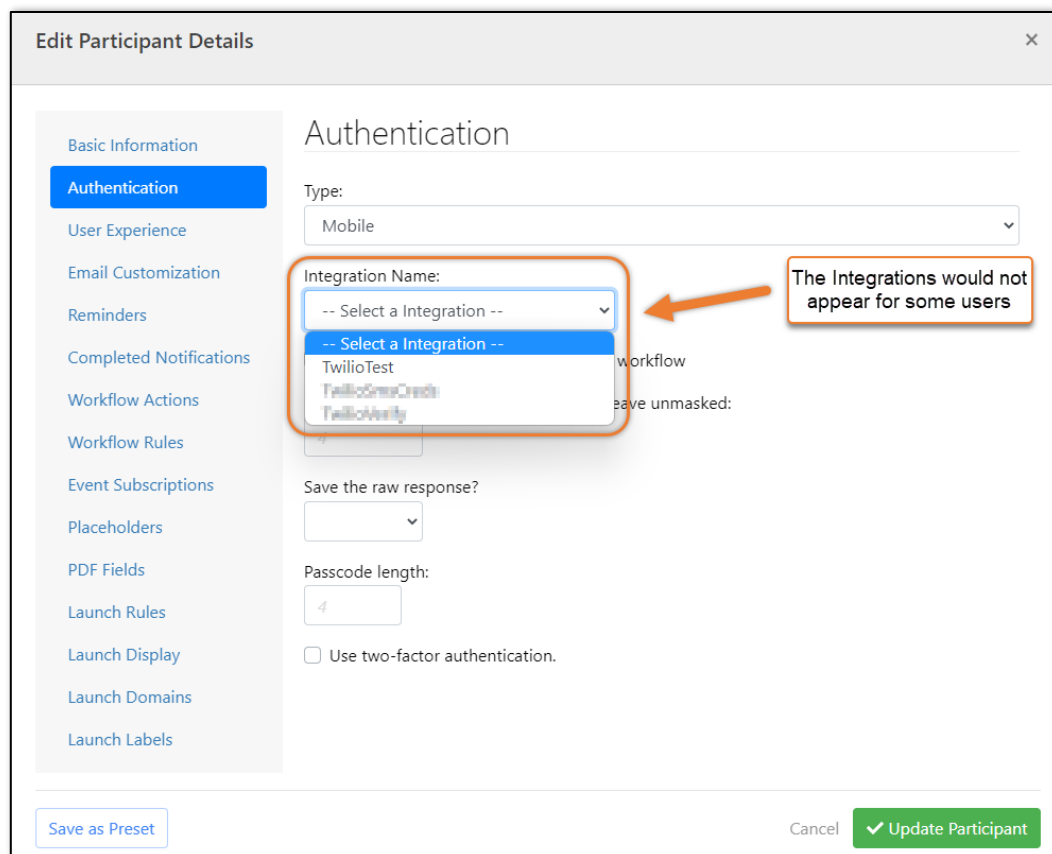
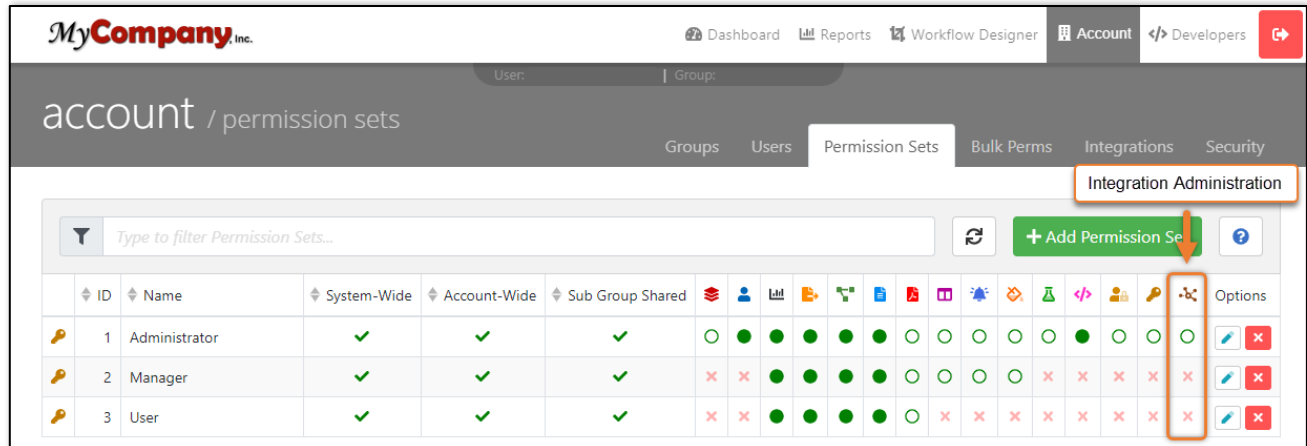
Type to filter Workflows... Group Workflows Import + New Workflow

Workflow	Created By	Created	Last Modified	Options
Document(s) I need to sign...	Jane Doe	2022-12-16	2023-01-13	
Consent Form Fixed	Sub Group Shared	2022-11-22	2022-11-22	
Simple Test	Jane Doe	2022-07-26	2022-10-18	

[PEP-5483] - Fixed issue where when calling GetWorkflowLaunchRules() for a Workflow that does not exist, the API permission check would return the incorrect response. If no Workflow exists, the API call should return *false* with a message stating that the Workflow either doesn't exist or you don't have the correct permissions to access it.

[PEP-5442] - Fixed issue where when selecting Mobile Authentication integration for a participant the *Integration Name* dropdown would not populate with selectable integrations. This issue would specifically affect users that did not have permission to *Integration Administration*. Please see the image below for the referenced permission and more details.

Release Notes



[PEP-5440] - Fixed issue where some of the options buttons would not appear on the Workflows page for certain Workflows. This issue affected Workflows where the Created By user was deleted. All options will now render on the page but will be disabled if the current user is not allowed to click/use them. Please reference the image below for more details.

Release Notes

MyCompany, Inc. Dashboard Reports Workflow Designer Account Developers

User: | Group: MyCompany, Inc.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Type to filter Workflows... Private Workflows Import + New Workflow ?

Workflow	Created By	Created	Last Modified	Options
Pending_Sig WF Bug	Bob Jones	2022-01-31	2022-04-20	[Icons]
Test Workflow	Bob Jones	2022-02-17	2022-02-17	[Icons]
Sample - In Person	Bob Jones	2020-10-16	2022-02-08	[Icons]
ADP test	Bob Jones	2021-09-15	2021-09-15	[Icons]
Test Completion NEW - COPY	Bob Jones	2021-08-18	2021-08-18	[Icons]
Sample - Email Only	Bob Jones	2020-10-13	2021-08-04	[Icons]
Sample - In Person & Email	Bob Jones	2020-10-01	2021-08-04	[Icons]
Internal Review - Finance	Bob Jones	2021-04-07	2021-08-04	[Icons]

1 - 10 of 11 items

[PEP-5421] - Fixed issue where after reassigning a task to a new participant the Event Subscription for an Authentication Failed Event would not carry over to the reassigned participant. Please see the referenced setting in the image below.

Edit Participant Details

Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Actions Workflow Rules **Event Subscriptions** Placeholders PDF Fields Launch Rules Launch Display Launch Domains Launch Labels

Event Subscriptions

Subscription 1 [Delete](#)

Type: Authentication Failed Event

☒ Webhook ☐ Email ☐ SMS

URL:

Data:

[Add Event Subscription](#) ☐ Show Advanced

[Save as Preset](#) [Cancel](#) [Update Participant](#)

[PEP-5240] - Fixed issue where phone number validation would not allow for + country codes. Please see the example phone number with a country code below for more details.

Release Notes

Edit Participant Details

Basic Information
Authentication
User Experience
Email Customization
Reminders
Completed Notifications
Workflow Actions
Workflow Rules
Event Subscriptions
Placeholders
PDF Fields
Launch Rules
Launch Display
Launch Domains
Launch Labels

Authentication

Type: Mobile

Integration Name: -- Select a Integration --

☒ Set permanent phone number for this workflow

Send to mobile phone number: +447975777666

Number of phone number characters to leave unmasked: 4

Save the raw response? No

Passcode length: 4

☐ Use two-factor authentication.

Save as Preset Cancel **Update Participant**

[PEP-4984] - Fixed issue where the Document Review workflow action on a task would show all documents in the participants workflow instead of only the document that the task was in. Please reference the example setting and image below for more details.

Edit Task Details

Basic Information
User Experience
Style
Placement
Workflow Actions
Event Subscriptions
Launch

Workflow Actions

Action 1 Delete

Type: Document Review

Add Workflow Action ☐ Show Advanced

Cancel **Update Task**

Document Review

If you wish, you may view or download the document you will be signing. They are listed in the table to the right of this page. You will also see the full document during the signing process. If the document already contains one or more signatures, you will see those present in the document.

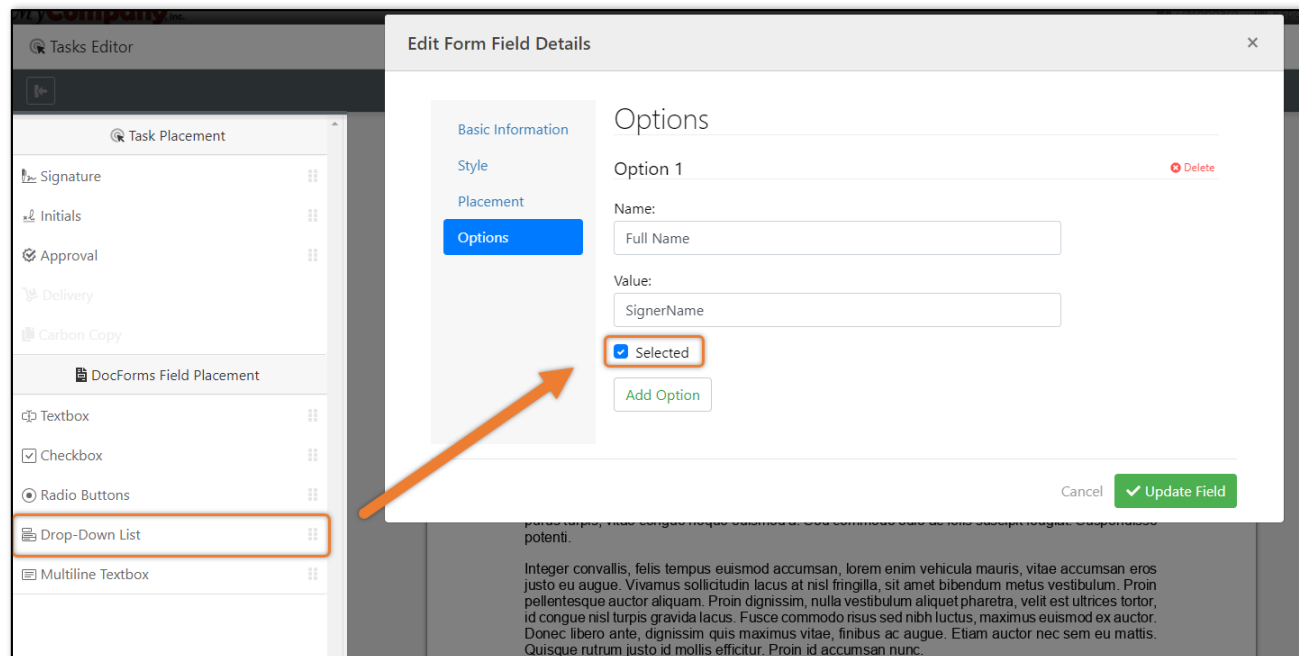
Document	Options
Test Document	Open
Sample Document1	Open

Continue

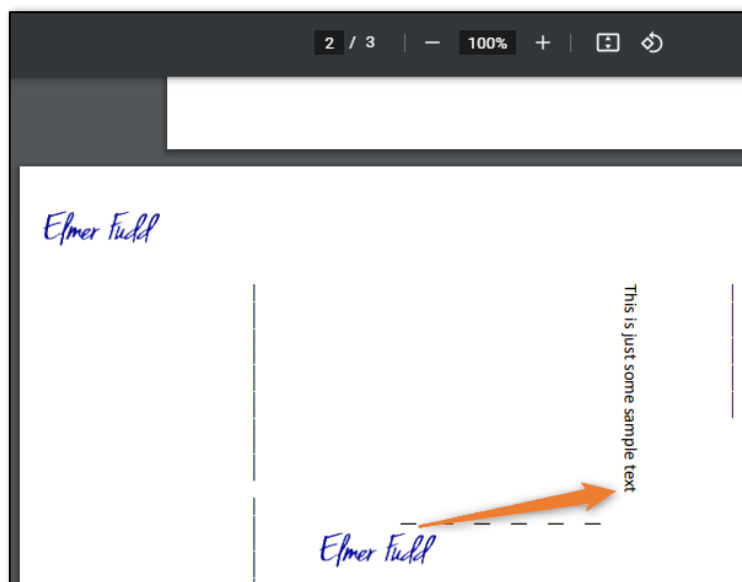
v6.15.10.0

Release Notes

[PEP-4322] - Fixed issue where a user would be unable to un-check a DocForms dropdown option while in the task editor. Please see the image below for more details.



[PEP-3438] - Fixed issue where when a page in a PDF document is rotated 90 or 180 degrees, the calculation for the signature placement is off when its position is near search text. Please see the example signature image below.



[PEP-2979] - Fixed issue where the RemoteSign() API call would fail validation if the participant name wasn't set on creation. Please view the Signing Remotely developers article below for more information.
<https://developers.alphatrust.com/documentation/tasks/signing-remotely.html>.

[PEP-2555] - Fixed issue where the *User Password Change* setting could be set to a negative number. Please see the image below for an example of the setting referenced.

Release Notes

Edit Group

Basic Information
Document Integrity
Security
Privacy Policy
User Experience
Logo
Multi-Factor Authentication
Email Services

Security

Session Expiration:
30 minutes (leave blank for default)

Users Password Change Required:
of Days Until Password Change

Require after:
30

Change API Secret:
[Redacted] [Generate Token](#)

KBA Allow Fail:
None

☐ Lock out System-Wide Administrators
☒ Enable User Permissions to automatically cascade to Sub-Groups

Cancel [Update Group](#)

[PEP-2554] - Fixed issue where the *Document Retention* setting could be set to a negative number. Please see the image below for an example of the setting referenced.

Edit Group

Basic Information
Document Integrity
Security
Privacy Policy
User Experience
Logo
Multi-Factor Authentication
Email Services

Document Integrity

Document Retention:
Purge at specified # of days after 'Completed'

Retention Days Before Purge:
40

This is the number of days that the documents will be deleted from the server once a document is set to the "Completed" status. If you want all documents to be deleted after one year of being completed, set this value 365.

Enforce Digital Signature:
None

Cancel [Update Group](#)

[PEP-1643] - Fixed issue where the password change field was no longer a number field when set to never. Please see the image below for an example of the setting referenced.

Edit User

Basic Information
Organization
Permissions
SSO Logins

Organization

Group:
MyCompany Inc

Title:
[Empty]

Organization:
[Empty]

Required Password Change Schedule:
Never

Cancel [Update User](#)

Release Notes

v5.15.10 Release

Production Release Date: 11/17/2022

Bug Fixes

[PEP-5715] - Fixed issue where participants would see a required validation error for pre-selected checkboxes when prepopulating checkboxes from a PDF. Participants would need to deselect and reselect the checked box in order to bypass the validation error. Please reference the image below of an example of the error seen with checkboxes.

The screenshot shows a form titled "3. Your Employment Details" from "MyCompany, Inc.". It includes fields for "Your current job(s)", "Length of service", and "Please state your normal working hours". A section for "Please indicate your current employment status (tick all that apply)" contains checkboxes for "Employed", "Self-Employed", "Company Director", and "Unemployed". A red box highlights this section, and a red vertical line labeled "Required" is positioned to the right of the checkboxes, indicating a validation error.

[PEP-5662] - Fixed issue where users may be unable to upload documents if they left the Workflow Setup screen open for too long. Reference the image below for an example of the error message seen.

The screenshot shows the "Document Setup" screen with three main sections: "Upload Documents from your computer", "Choose from the Documents repository", and "Upload the Document on the launch page". Below these sections, a red error message bar is visible, stating "MyCompany_NDA1.pdf 251 KB error".

[PEP-5420] - Fixed issue where a reassigned participant would not receive an email notification if the initial participant's signing method was In-Person. Please see the images below for an example of the Workflow settings referenced.

The screenshot shows the "Workflow Setup" screen for a workflow named "Simple Test". The "Participant Setup" section is visible, showing a table with columns for "Role", "Full Name", and "Email Address". The "In-Person" signing method is selected for the participant "Signer 1". The "Final Email" and "Include Docs" options are also visible.

Release Notes

Edit Participant Details [X]

Preset: [Menu Icon] -- Apply a Preset -- [Dropdown Arrow] [Manage Presets]

Workflow Rules

Custom Exit Url:

☒ Allow participant to reassign tasks to a different person if necessary.

Verify/Query for:

- ☐ Full Name
- ☐ Email Address
- ☐ Title
- ☐ Organization

Document Access Window:
Leave Document available minutes after completed

Document Access Limit:
Allow Participant to access times after completed

[Save as Preset] [Cancel] [Update Participant]

v5.15.9 Release

Production Release Date: 11/3/2022

Bug Fixes

[PEP-5621] - Fixed issue where integrations for Mobile Authentication would not appear for users with Manager and User permissions. Users with Manager and User permissions should be able to select an integration from the drop-down for Mobile Authentication. Please see the images below for reference to Permission Sets and the view each user would see.

Release Notes

The screenshot displays the 'account / permission sets' interface. At the top, there's a navigation bar with tabs: Groups, Users, Permission Sets, Bulk Perms, Integrations, and Security. Below this is a search bar and a '+ Add Permission Set' button. A table lists permission sets with columns: ID, Name, System-Wide, Account-Wide, Sub Group Shared, and various icons. The table has three rows: 1. Administrator, 2. Manager, 3. User.

Below the table, there are two 'Edit Participant Details' modal windows. The top modal shows the 'Authentication' tab. It has a 'Type' dropdown set to 'Mobile'. The 'Integration Name' dropdown is highlighted with an orange box and labeled 'Manager and User view'. The bottom modal shows the same 'Authentication' tab. The 'Integration Name' dropdown is highlighted with an orange box and labeled 'Administrator view'. A note next to it says 'Note: All Users should have this view'. An orange arrow points from the 'Integration Name' dropdown in the top modal to the one in the bottom modal.

ID	Name	System-Wide	Account-Wide	Sub Group Shared	Icons	Options
1	Administrator	✓	✓	✓	Icons	Options
2	Manager	✓	✓	✓	Icons	Options
3	User	✓	✓	✓	Icons	Options

[PEP-5603] - Fixed issue where the *Document Access Window* message wasn't displaying the correct time remaining to access the completed documents. Please reference the image below of an example where the *Document Access Window* was set to 75 minutes and the message incorrectly says the user has 14 minutes.

Release Notes

Edit Participant Details

Preset: -- Apply a Preset -- Manage Presets

Workflow Rules

Custom Exit Url:

☐ Allow participant to reassign tasks to a different person if necessary.

Verify/Query for:
☐ Full Name
☐ Email Address
☐ Title
☐ Organization

Document Access Window:
Leave Document available minutes after completed

Document Access Limit:
Allow Participant to access times after completed

Save as Preset Cancel **Update Participant**

Success!

Thank you. You have successfully completed your document(s).

Please download a copy of your document(s) to your computer for safekeeping. Once you have downloaded your document(s) you may close this browser window.

You may re-access this page and download the document(s) listed below using the original access link for the next 14 minutes unless the transaction is cancelled by another participant or expires.

Document	Status	Status Details	Options
MyCompany NDA	✓ Completed	This document is complete and contains all required tasks.	Download Open

[PEP-5428] - Fixed issue where the Metadata fields in the Document Editor would lose focus and prevent continuous typing after each keypress. Please reference the image below of an example Metadata field for more details.

Edit Document Details

Metadata

Metadata 1 Delete

Name:

Value:

Add Metadata

Save as Preset Cancel **Update Document**

Document Setup

Document Title	File Name	Is Upload	Manage Tasks	Options
MyCompany NDA	MyCompany_NDA.pdf	<input type="checkbox"/>	Tag Document 1	

Release Notes

v5.15.8 Release

Production Release Date: 10/20/2022

Bug Fixes

[PEP-5561] - Fixed issue where users were unable to launch workflows utilizing an upload document with a signature block. Reference the images below for an example of the Workflow settings and the error message seen on the launch page.

workflow designer / workflows

Workflow Setup

Label/Description: Sample Workflow

Participant Setup

Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
Signer 1	Jane Doe	jdoe@gmail.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

+ Add Participant + Add Me + Add Advanced

Document Setup

Upload Documents from your computer

Choose from the Documents repository

Upload the Document on the launch page

+ Use a Blank Template

Tasks Editor

All Participants

Blank Template

Label	Task Type	Placeholder Type	Placeholder/Position	Participant	Options
Sig 1	Signature	Form Field Name	Sig1	Jane Doe	Manage Data

+ Add Task

An Error Occurred

An error occurred. Please check the developer console for details.

123ABC

Signer 1 Information

Full Name: test

Report Details

Transaction Description:

Upload Document: Browse for file...

Start Workflow

Processing Document(s)...

Release Notes

[PEP-5462] - Fixed issue where two-factor authentication failed when configured as *PIN/Password* first and *Mobile* second. Authentication data had an invalid character appended to it when a two-factor mobile authentication was used. Please see the image below for the authentication settings referenced.

The screenshot shows the 'Edit Participant Details' dialog with the 'Authentication' tab selected. The left sidebar lists various settings categories. The main content area is titled 'Authentication' and contains the following fields and options:

- Type:** A dropdown menu set to 'One-time PIN/Password'.
- ☐ Set permanent password for this workflow
- ☒ Use two-factor authentication.
- Second-Factor Authentication**
- Type:** A dropdown menu set to 'Mobile'.
- Credential Name:** A dropdown menu set to 'TwilioCreds'.
- ☒ Set permanent phone number for this workflow
- Send to mobile phone number:** An empty text input field.
- Number of phone number characters to leave unmasked:** A text input field containing the number '4'.
- Save the raw response?:** A dropdown menu.
- Passcode length:** A text input field containing the number '4'.

At the bottom of the dialog, there are three buttons: 'Save as Preset' (disabled), 'Cancel', and 'Update Participant' (green button with a checkmark).

[PEP-4792] - Fixed issue where System-Wide Integrations were not displayed for non-system admin users. Included System-Wide integrations to be available for Workflow Authentication options as well as visibility in the integrations list. Reference the images below for the System-Wide integration setting and an example of an where an integration could be utilized.

The screenshot shows the 'Add Integration' dialog with the 'Integration' tab selected. The left sidebar lists various settings categories. The main content area is titled 'Integration' and contains the following fields and options:

- ☒ System-Wide (highlighted with a red box)
- Integration Name:** An empty text input field.
- Provider:** A dropdown menu set to 'Please select one'.

At the bottom of the dialog, there are two buttons: 'Cancel' and 'Add Integration' (green button with a checkmark).

Release Notes

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domains

Launch Labels

Authentication

Type: Mobile

Credential Name: -- Select a Credential --

☐ Set permanent phone number for this workflow

Number of phone number characters to leave unmasked: 4

Save the raw response? ☐

Passcode length: 4

☐ Use two-factor authentication.

Save as Preset Cancel **Update Participant**

v5.15.7 Release

Production Release Date: 10/6/2022

Bug Fixes

[PEP-5534]- Fixed issue with Web Form checkboxes utilizing Field Rules where if they were marked as “required” the system would not recognize they were checked. Once the user tried to click the *Save and Continue* button, the checkbox would be highlighted as required even though it was already checked. Please reference the image below for more details.

Recurring premium payments

Recurring Premium Payment: ☒ Required

Amount: \$ 4321

[PEP-5517] - Fixed issue where an error message would appear when attempting to Void a Completed transaction from the status reports page. The Void completes successfully but isn't reflected until the page is refreshed. Reference the image below for an example of the error message seen and an affected transaction.

Release Notes

The screenshot shows the 'reports / status' interface. At the top, there's a navigation bar with 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. Below this, a sub-header shows 'User:' and 'Group:'. The main content area has tabs for 'Status', 'Trends', 'Completion Rates', and 'Verify Document'. A red error message banner at the top states: 'An error occurred while attempting to void/unvoid the document. Please check the developer console for more details.' Below this, a search bar contains filters for date range (2022-08-30 ~ 2022-09-13), status (Complete), and a search button. A table lists transactions with columns: Transaction ID, Description, Created Date, Status, Closed Date, and Options. The first transaction has ID 1000579838, description 'MyCompany PQ: 59387', and status 'Completed'. An orange box highlights the 'Options' column for this transaction, containing a trash icon and a speech bubble icon. A callout box with an arrow points to the 'Status' column, stating: 'After the search is refreshed, the transaction shows the Void was successful.' Below this, the same search bar now shows 'Voided' as the selected status. The table shows the same transaction, but its status is now 'Voided'.

Transaction ID	Description	Created Date	Status	Closed Date	Options
1000579838	MyCompany PQ: 59387	2022-09-13 11:18 AM EDT	Completed	2022-09-13 11:19 AM EDT	[Trash] [Speech]

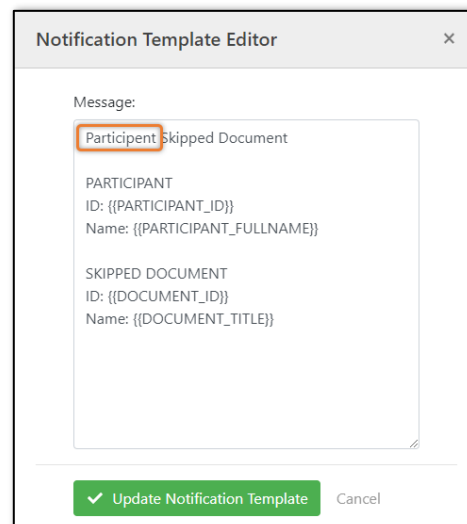
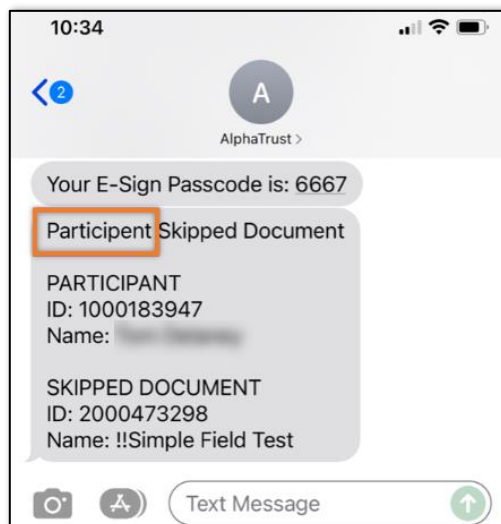
Transaction ID	Description	Created Date	Status	Closed Date	Options
1000579838	MyCompany PQ: 59387	2022-09-13 11:18 AM EDT	Voided	2022-09-13 11:19 AM EDT	[Trash] [Speech]

v5.15.6 Release

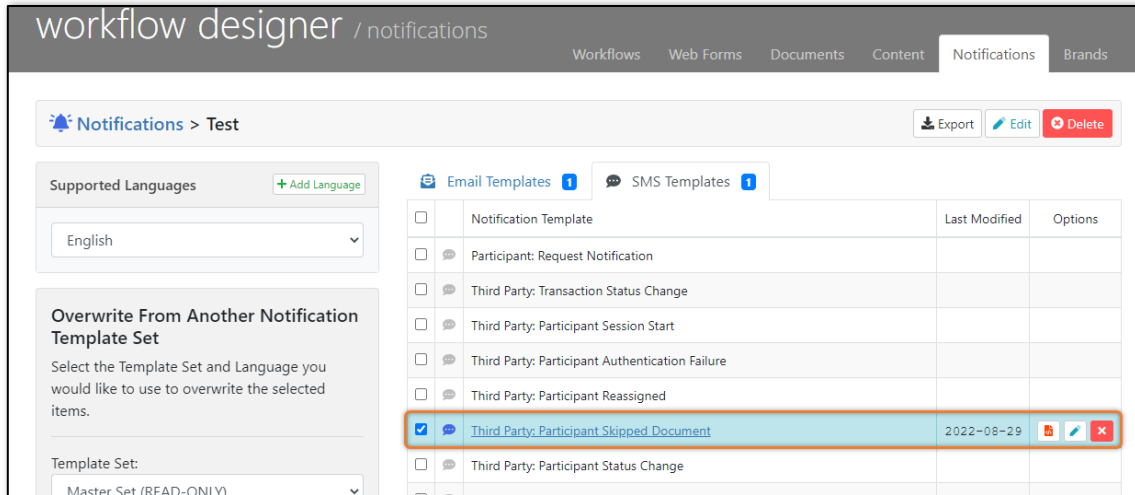
Production Release Date: 9/22/2022

Bug Fixes

[PEP-5433] - Fixed issue where the word *Participant* was spelled incorrectly in the Participant Skipped Document SMS Notification template. Please reference the images below of an example text message, the Participant Skipped Document template, and location of the referenced template.



Release Notes

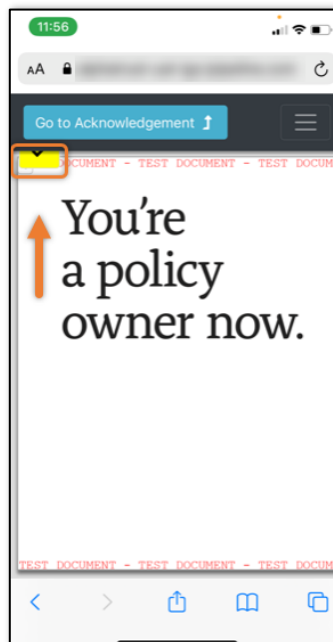


[PEP-5388] - Fixed issue where the workflow launch would fail if the Final Email Notifications were left blank. Note: if the fields are left blank, the Final Email Notification section will be ignored. Please reference the image below for more details.

The screenshot shows the 'Final Email Notifications' form. It includes a description: 'Once your workflow transaction has been fully completed by all Participants, an email notification will be sent to the email addresses entered below using the following settings. If you want final email notifications set to any Workflow Participants, you select that option in the Participants Setup section above.' Below this are four toggle switches: 'Send If Completed' (on), 'Send If Cancelled' (on), 'Send If Expired' (on), and 'Attach Signed Documents' (off). There are two input fields for 'Full Name' and 'Email Address', both highlighted with a red box. Below these fields are two buttons: '+ Add Email Recipient' and '+ Add Me'.

[PEP-5345] - Fixed issue where the GetWorkflows() API call would not return ComboBox fields in the response. Added ComboBox as a Document Form Field return type for the GetWorkflows() API method.

[PEP-4955] - Fixed issue where, when signing on mobile, the task button may render outside of the document. Please reference the image below for more details.



Release Notes

v5.15.5.2 Release

Production Release Date: 9/8/2022

Bug Fixes

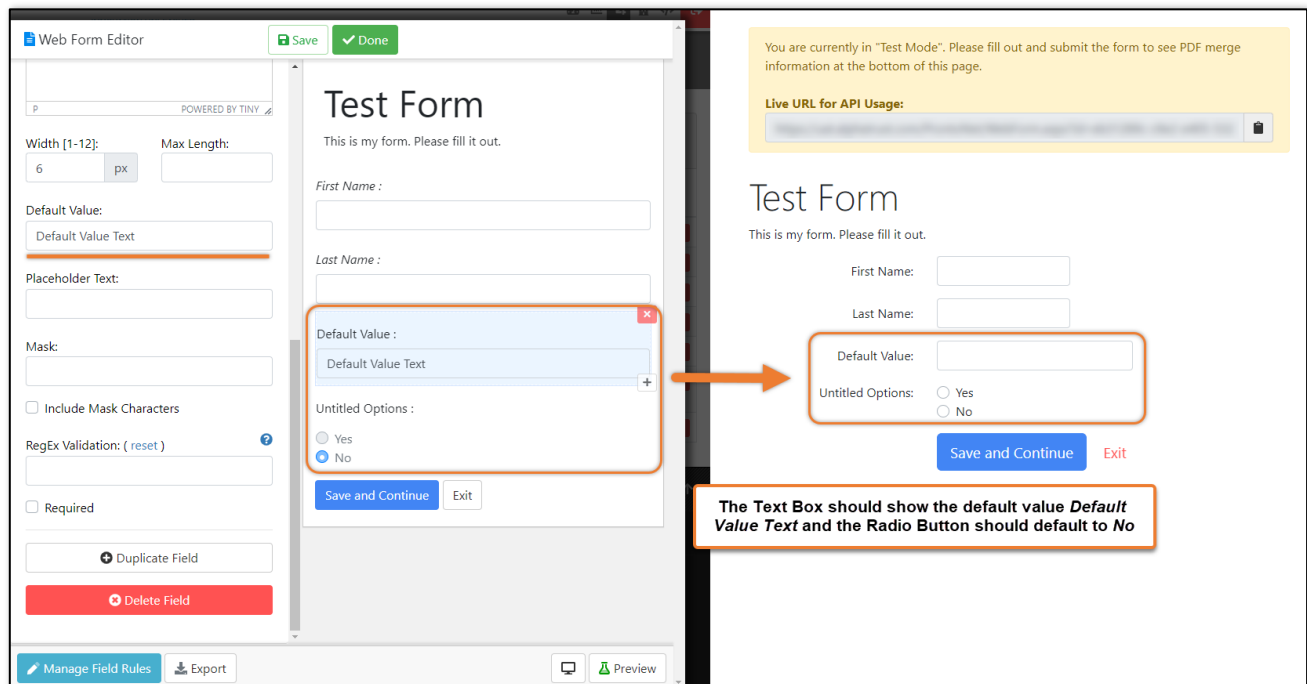
[PEP-5496] - Fixed issue where the CreateTransactions() API call was not merging values into form fields.

v5.15.5.1 Release

Production Release Date: 9/8/2022

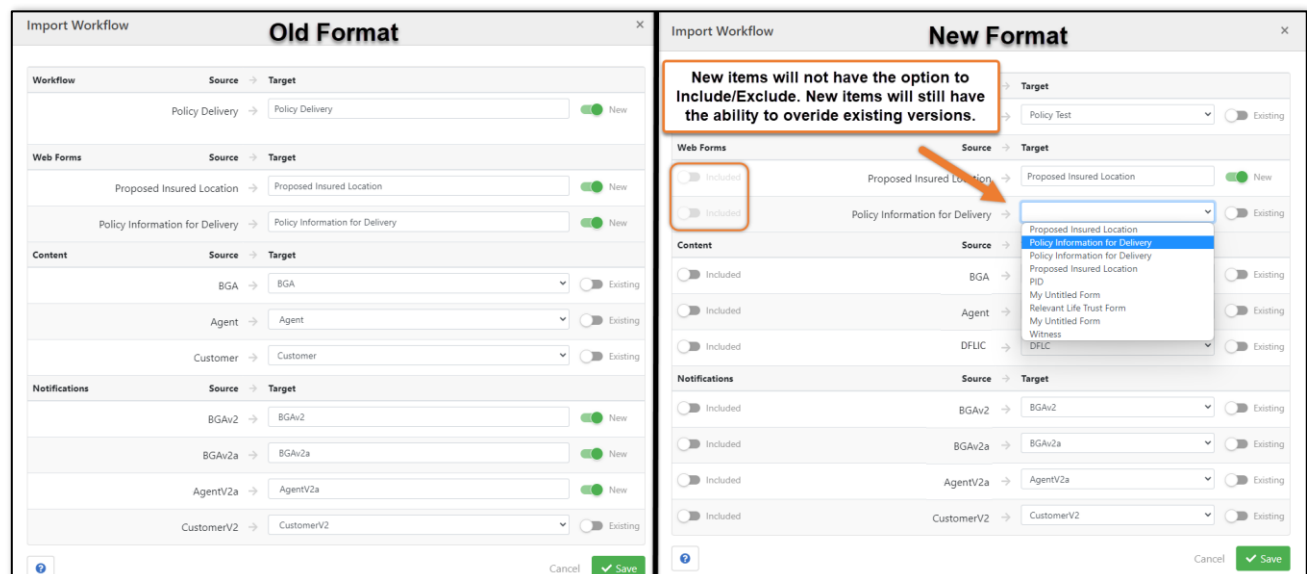
Bug Fixes

[PEP-5482] - Fixed issue where the default values for fields would not appear in Web Forms. Please see the image below of two examples of default values that should appear.



[PEP-5479] - Fixed issue where GetWorkflowLaunchRules() API method would error when calling a workflow created in a Sub Group.

[PEP-5464] - Fixed issue where users were not able to exclude or include existing referenced Web Forms, Content Sets, Brands, and Notifications for Workflow Imports. Added exclude/include options back into the Workflow Imports but now they are only available options on items that already exist. Please reference the image below for more details.



Release Notes

[PEP-5444] - Fixed issue where Participants with Input Types of *Launch process* will use the launcher's information for the Participant or Launch process will use the fixed Participant information entered below would cause the Launcher to be prompted for a Phone Number on the Launch Page even though it is not required or needed. Images of the Workflow settings and Launch Page can be seen below.

Edit Participant Details

Preset: -- Apply a Preset -- Manage Presets

Launch Rules

☐ This Participant is optional at launch.

Input Type:
Launch process will use the launcher's information for the Participant.

Launch Rules

☐ This Participant is optional at launch.

☐ Allow custom email message by launcher.

Input Type:
Launch process will use the fixed Participant information entered below.

Full Name:
Jane Doe

Email Address:
jdoe@mail.com

Phone Number:

Title:

Organization:

Save as Preset Cancel Update Participant

MyCompany, Inc. Dashboard Reports Workflow Designer Account Developers

User: | Group: MyCompany, Inc.

dashboard / workflow templates launch

Quick Stats | Workflow Templates Launch | Pending Signatures

MyCompany NDA ← Back Test

Phone Number:

Send Workflow

Phone Number field should not appear on the Launch Page.

MyCompany, Inc. Back to top

Release Notes

[PEP-5356] - Fixed issue where the GetWorkflowLaunchRules() API didn't return Launch Display properties. Added the Workflow Launch Display properties for API-driven launch pages. Three new properties have been added to the API response call "LaunchHeading", "LaunchInstructions", and "LaunchSubmitButtonText". Please see the image below for an example of the API response call.

```
40     "Label": null,  
41     "IsOptional": false  
42   }  
43 ]  
44 }  
45 },  
46 "LaunchHeading": "Launch Header Test",  
47 "LaunchInstructions":  
48   "LaunchSubmitButtonText": "submit button"  
49 },  
50 "ProcessingTime": "00:00:00.3139994",  
51 "TimeZoneUtcOffset": 0.0
```

[PEP-5287] - Fixed issue where the CreateTransactions() API validation error message did not include the document index and document title/name.

[PEP-5285] - Fixed issue where Event Subscriptions for Authentication Failed Events would not be sent. Added logic to trigger web hook on authorization failures.

[PEP-5279] - Fixed issue where deleting a subsequent Workflow Event Subscription would delete the first Event Subscription. Please see the image below for more details.

Event Subscriptions

Subscription 1 Delete

Type: Status Changed Event

☒ Webhook ☐ Email ☐ SMS

URL:

Data:

Subscription 2 Delete

Type: Skipped Document Event

☐ Webhook ☐ Email ☒ SMS

Phone Number:

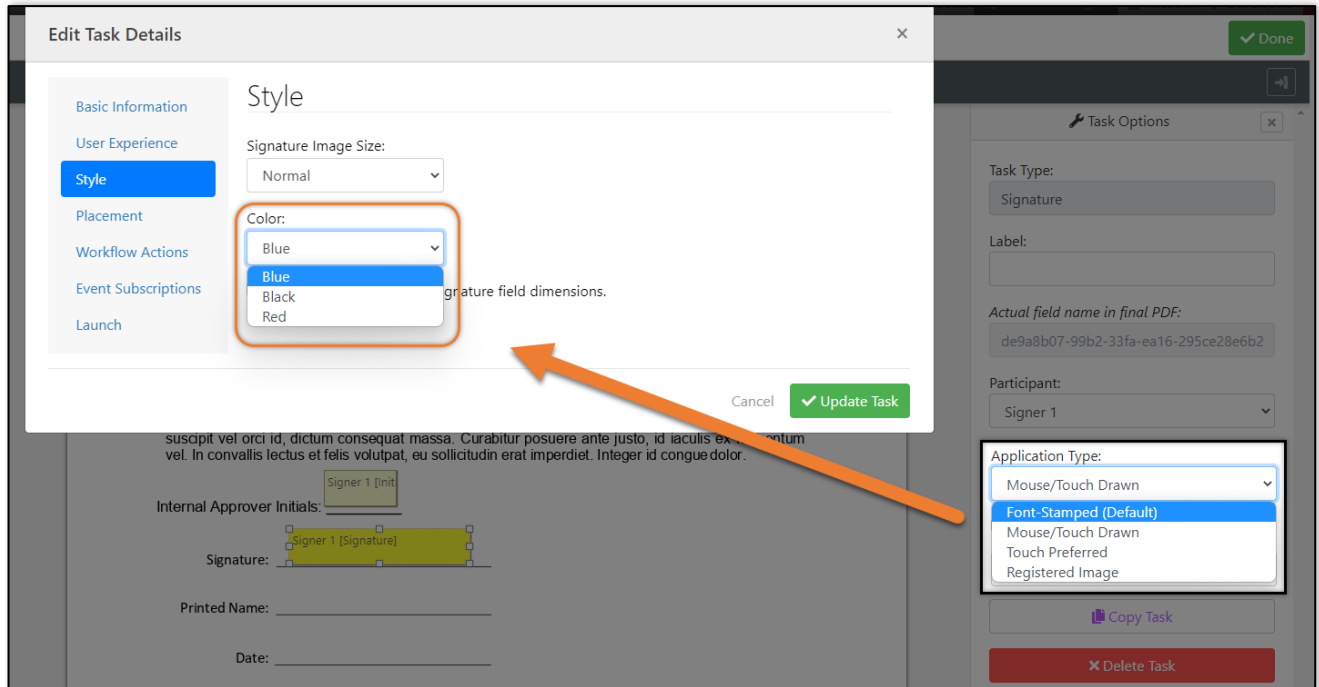
Data:

☐ Show Advanced

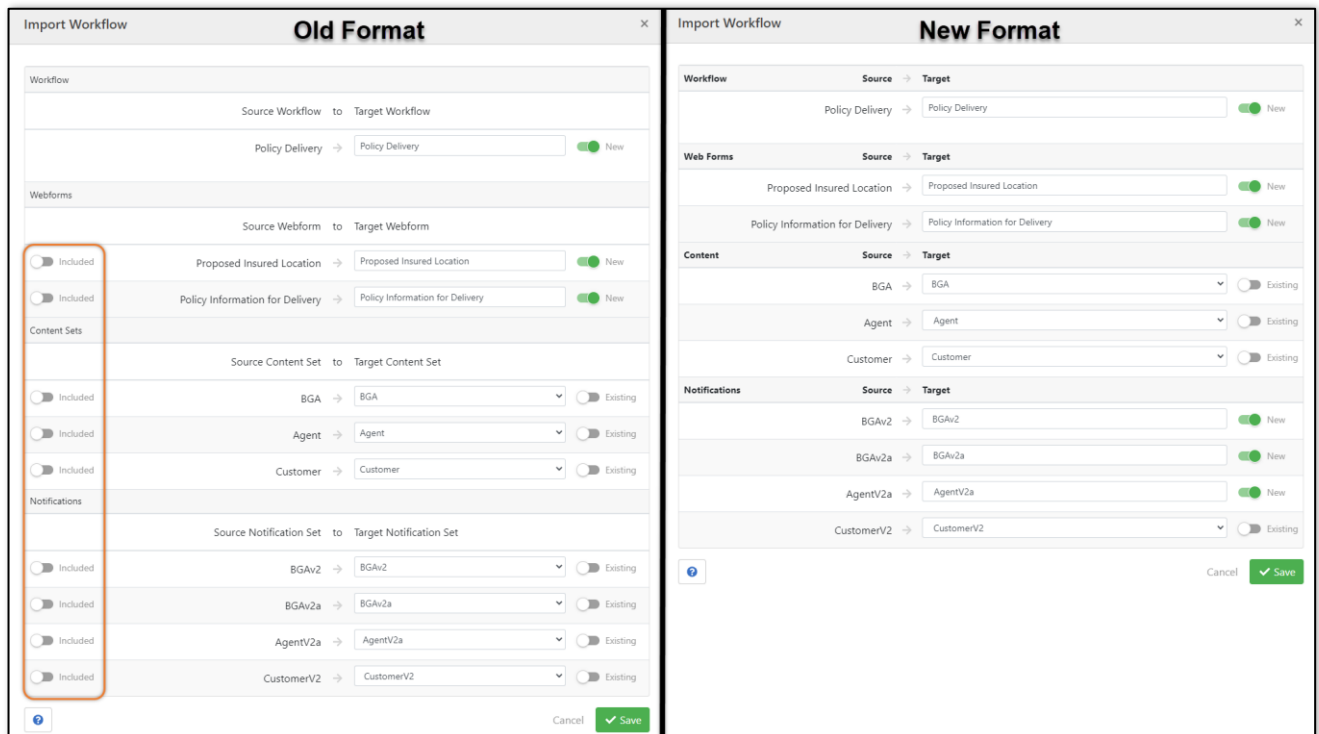
[PEP-5257] - Fixed issue where Web Form fields would not appear or disappear according to the Field Rules.

Release Notes

[PEP-5249] - Fixed issue where signature Application Types would not appear in the Signature color selected. Please see the image below for more details.



[PEP-5180] - Fixed issue where if a Web Form, referenced in a Workflow, is excluded from an imported Workflow the Workflow would not launch and an error would be shown in reference to the excluded Web Form. Removed the option to exclude referenced Web Forms, Content Sets, and Notifications for Workflow Imports.



[PEP-5123] - Fixed issue with inserting new Legacy Experian integration credential data.

[PEP-5121] - Fixed issue where webhooks with no retry limit set only attempt to retry two times. The webhooks should retry for the default setting, which is three days.

Release Notes

[PEP-5106] - Fixed issue where the system was attempting to seal documents that are not in a complete status. Added logic to check for IsFinal when reporting missing final file.

[PEP-4860] - Fixed issue where a user is not redirected properly after deleting an account on the User details page. Users should be redirected back to the User page. Please see the image below for more details.

The image displays two screenshots of the MyCompany, Inc. user management interface. The top screenshot shows the 'Delete User' button for Bob Jones, with a callout box stating: "After clicking on the Delete User button, it should redirect the user to the Users page." An orange arrow points from this callout to the bottom screenshot. The bottom screenshot shows the 'Users' page with a list of users, including John Smith and Bob Jones.

Top Screenshot: User Details for Bob Jones

Navigation: Dashboard, Reports, Workflow Designer, Account, Developers

account / users

Groups | Users | Permission Sets | Bulk Perms | Integrations | Security

Users > Bob Jones

Buttons: Edit User, Reset Password, Add Permission, Delete User

User Information:

Username:	bjones
Full Name:	Bob Jones
Email Address:	[redacted]
Title:	PM/Admin
Organization:	MyCompany Inc
Group ID:	[redacted]
Group:	MyCompany, Inc.

Permissions (3) | Emails (54)

Account	Permission Set	Allow Open Signing	Allow Open Signing Queue	Options
MyCompany, Inc.	Administrator	✓	✓	[edit] [delete]
My Company	Administrator	✓	✓	[edit] [delete]
MyCompany_Customers	Administrator	✓	✓	[edit] [delete]

Bottom Screenshot: Users List

Navigation: Dashboard, Reports, Workflow Designer, Account, Developers

account / users

Groups | Users | Permission Sets | Bulk Perms | Integrations | Security

Filter: Type to filter Users... | Group Users | Export | Bulk Upload | Add User

Username	Full Name	Email Address	Sig Image	PWD Expires	Last Login	Options
jsmith	John Smith	[redacted]		never	2022-06-06	[refresh] [lock] [list] [edit] [delete]
bjones	Bob Jones	[redacted]		never	2022-06-15	[refresh] [lock] [list] [edit] [delete]

[PEP-2187] - Fixed issue where the phone number placeholder was displaying instead of the phone number when launch Input Type was *Launch process will use the fixed Participant information entered below*. Also fixed issue where when Authentication type is set to Mobile and a fixed Participant is used with no phone number provided, the phone number was not requested when the Workflow was Launched. The images below show the Workflow Authentication and Launch Rules settings, the phone number placeholder that will be removed, and the Phone Number field that is requested if there is no phone number in the fixed participant information.

Release Notes

Edit Participant Details

Preset: -- Apply a Preset --

Manage Presets

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domains

Launch Labels

Type:

Mobile

Credential Name:

-- Select a Credential --

☐ Set permanent phone number for this workflow

Number of phone number characters to leave unmasked:

4

Save the raw response?

Passcode length:

4

☐ Use two-factor authentication.

Save as Preset

Cancel

Update Participant

Edit Participant Details

Preset: -- Apply a Preset --

Manage Presets

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domains

Launch Labels

Launch Rules

☐ This Participant is optional at launch.

Input Type:

Launch process will use the fixed Participant information entered below.

Full Name:

Email Address:

Phone Number:

Title:

Organization:

Save as Preset

Cancel

Update Participant

MyCompany Inc.

Mobile Authentication

Authentication is required before accessing your documents.

Step 1: Send Passcode

Send the passcode to the following phone number: {{PhoneNumberMask}}.

Messaging rates may apply.

Send via: ☒ Text ☐ Voice

Send Passcode Now Exit

v5.15.4.0

Dashboard Reports Workflow Designer Account Developers

User: Group:

dashboard / workflow templates launch

Quick Stats Workflow Templates Launch Pending Signatures

Mobile Auth as Me - With Phone Number Test Back Test Edit

Phone Number:

Phone Number is required for the Mobile Authentication

Start Workflow

Release Notes

v5.15.4 Release

Production Release Date: 8/25/2022

Bug Fixes

[PEP-5330] - Fixed issue where webhook security tokens were expiring too quickly. Users were seeing intermittent failures that were occasionally resolved by multiple retries.

[PEP-5313] - Fixed issue where Document Workflow Actions in the Control Panel were displaying the incorrect action label. Please see the image below of where the Workflow Actions in the Transaction Status is located and an example of a correct action label.

The screenshot shows the 'MyCompany Inc.' interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header shows 'reports / status' and a sub-header with 'Transaction', 'Documents', 'Participants', 'Emails', 'Audit Report', and 'Event History'. The main content area is titled 'Search Results > Transaction Details: Participants'. It features a green header for 'MyCompany NDA' with transaction ID '2000266094' and a 'Void Transaction' button. Below this, a table lists participants:

Participant ID	Full Name	Email Address	Phone Number	Status	Options
1000180909	jane doe			Completed	
1000180910	John doe	noreply@participant.defined		Completed	

To the left of the table, a detailed view for 'PARTICIPANT: jane doe' shows fields for Participant ID, Transaction ID, Status / ID, Full Name, and Send Request via Email. Below this, a 'Workflow Actions' section is highlighted with a red box and an orange arrow pointing to a modal window. The modal window, titled 'Workflow Actions for Participant ID: 1000180909', shows a single workflow action: 'Define Participant'. The action details include Type, Status (Complete), Description, Started Date, and Completed Date.

[PEP-5271] - Fixed issue where it was difficult to find recently updated Workflows and Web Forms. Updated the default sorting from alphabetical to Last Modified. Please reference the image below for more details.

Release Notes

MyCompany Inc.

Dashboard

Reports

Workflow Designer

Account

Developers

User:

Group: MyCompany Inc

workflow designer / workflows

Workflows

Web Forms

Documents

Content

Notifications

Brands

Type to filter Workflows...

Group Workflows

Import

+ New Workflow

Workflow			Created By	Created	Last Modified	Options
Sample Workflow			Rachel Keenan	2021-07-19	2022-08-08	
Audit Report WF			Rachel Keenan	2022-08-01	2022-08-01	
MyCompany NDA			Bob Jones	2022-01-04	2022-06-13	
Sample Workflow			Bob Jones	2022-06-09	2022-06-09	
Test Workflow			Amanda Jones	2021-10-08	2022-03-24	
MyCompany PO: 22062			Amanda Jones	2022-01-28	2022-02-02	
Document Approval (Purchasing)			Bob Jones	2021-06-16	2022-02-02	
MyCompany Buyer NDA - Internal Review			Bob Jones	2022-02-02	2022-02-02	
MyCompany - NDA - MDS			Bob Jones	2021-07-27	2022-01-04	
Mobile Number Sample Test			Bob Jones	2021-08-24	2021-08-24	

<<

<

1

>

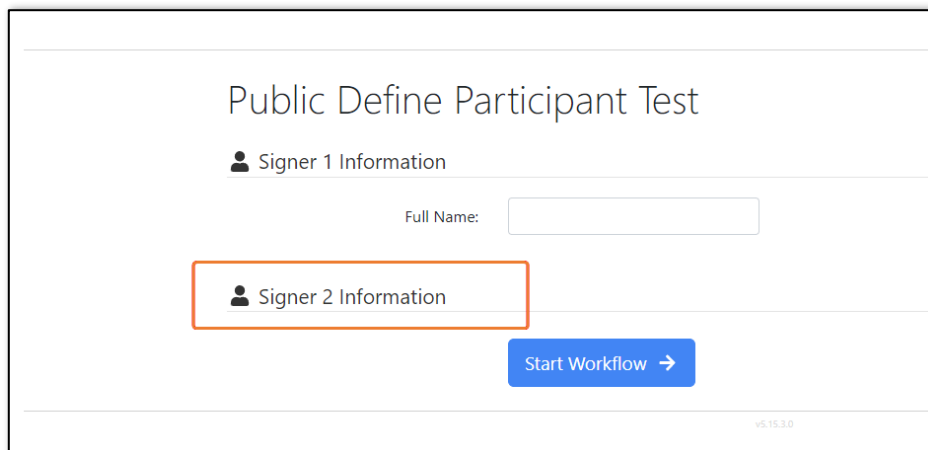
>>

10

items per page

1 - 10 of 10 items

[PEP-5270] - Fixed issue with Publicly Launched Workflows where, when using the Defined Participant Workflow Action, the second participant to be defined was showing unnecessarily for the Launcher. The second signer information should not appear on screen for the launcher as it was to be defined by the first participant. Images of the Workflow settings and issue can be seen below.



Public Define Participant Test

Signer 1 Information

Full Name:

Signer 2 Information

Start Workflow →

v5.15.3.0

Release Notes

Edit Workflow Details

Launch Rules

- ☒ Publish this Workflow as launchable template.
- ☒ Allow users in this Group to launch this Workflow.
- ☐ Allow users in all Sub Groups in this account to launch this Workflow.
- ☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.
- ☒ Allow this Workflow to be launched publicly with no authentication required.
- ☐ Allow the launch form to use the full page width (default is centered).
- ☐ Allow the Description to be edited at the time of launch.
- ☐ Enable Bulk Launching

Bulk Launching is disabled if any of the following options are being used:

- The Workflow is a Public Launch type
- There are in-person participants
- The Launcher needs to fill out one or more WebForm at launch
- The Launcher needs to fill out one or more DocForms at launch

[Save as Preset](#) [Cancel](#) [Update Workflow](#)

[PEP-5250] - Fixed issue where a DocForms Drop-Down List 'Name' field would lose focus and prevent continuous typing after each keypress. Please reference the image below of the example Drop-Down List for more details.

Edit Form Field Details

Options

Option 1 [Delete](#)

Name:

Value:

☐ Selected

[Add Option](#)

[Cancel](#) [Update Field](#)

[PEP-5248] - Fixed issue with Publicly launched Workflows' final notifications where the 'Email' field would appear on the Launch screen even though a fixed Participant Email was set. In this scenario no Email Address should have been asked for as a fixed Email Address was set for the Participant. Images of the Workflow settings and Launch Page can be seen below.

Release Notes

Public Launch - Fixed Email - Completed Notifications

Signer 2 Information (optional)

☒ Use optional participant?

Email Address:

Email Address field should not appear.

Edit Workflow Details

Launch Rules

☒ Publish this Workflow as launchable template.

☒ Allow users in this Group to launch this Workflow.

☐ Allow users in all Sub Groups in this account to launch this Workflow.

☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.

☒ Allow this Workflow to be launched publicly with no authentication required.

☐ Allow the launch form to use the full page width (default is centered).

☐ Allow the Description to be edited at the time of launch.

☐ Enable Bulk Launching

Bulk Launching is disabled if any of the following options are being used:

- The Workflow is a Public Launch type
- There are in-person participants
- The Launcher needs to fill out one or more WebForm at launch
- The Launcher needs to fill out one or more DocForms at launch

Release Notes

Edit Participant Details

Launch Rules

☒ This Participant is optional at launch.

☐ Allow custom email message by launcher.

Input Type:

Launch process will use the fixed Participant information entered below.

Full Name:

Jane Doe

Email Address:

jdoe@gmail.com

Phone Number:

Title:

Organization:

[Save as Preset](#) [Cancel](#) [Update Participant](#)

[PEP-5208] - Fixed issue with multiline textboxes on DocForms where only one line of text would be shown at a time. The textbox should have wrapped the text for users to easily read and enter information. Please see the image below for an example of the issue.

Praesent scelerisque sem ac imperdiet ornare. Sed dignissim erat lacinia, sagittis turpis et, mollis diam. Nullam gravida euismod nulla malesuada mollis. Fusce arcu nisi, fermentum ut semper in, bibendum quis justo. Proin neque tortor, cursus eget tincidunt in, scelerisque vitae velit. Cras arcu leo, suscipit vel orci id, dictum consequat massa. Curabitur posuere ante justo, id iaculis ex fermentum vel. In convallis lectus et felis volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.

Internal Approver Initials: _____

Signature: _____

Printed Name: _____

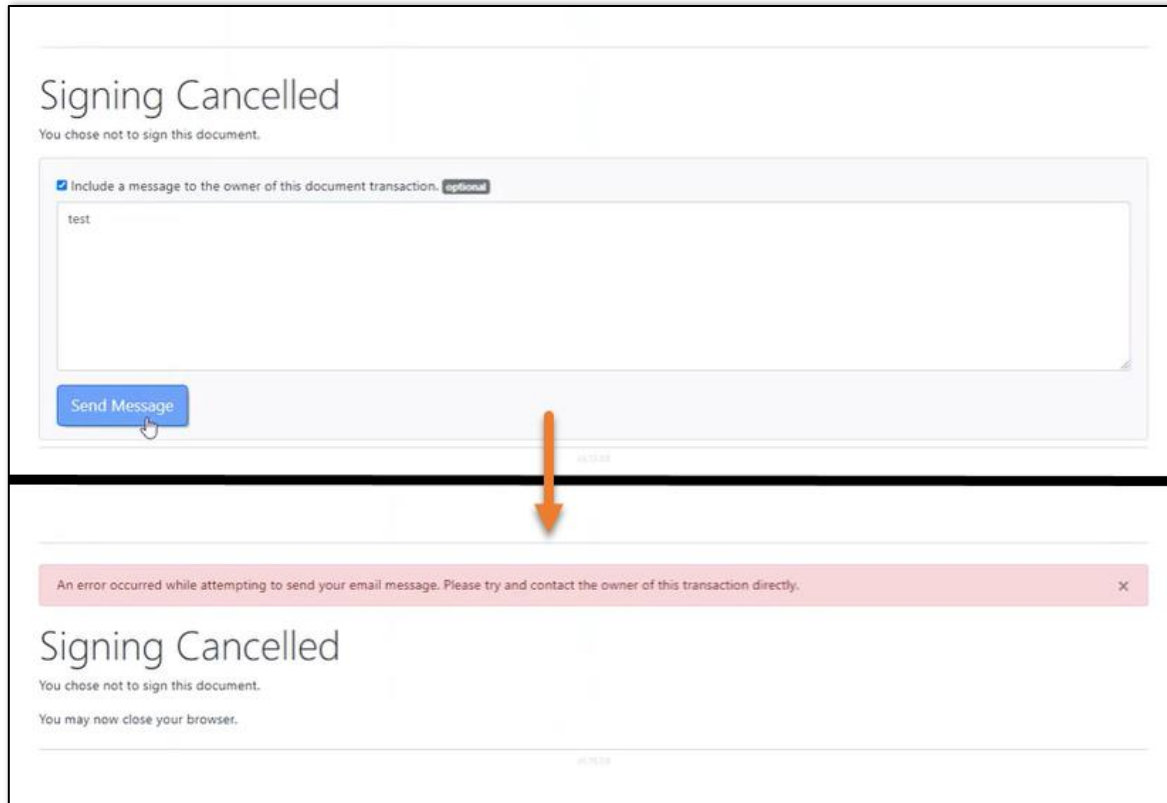
Date: _____

TEST DOCUMENT - TEST DOCUMENT - TEST DOCUMENT

[PEP-5105] - Added database query performance improvements.

[PEP-5049] - Fixed issue where when sending a cancellation reason on the Exit Page it would show an unnecessary error message. Images of the Workflow setting, Exit Page, and error message can be seen below.

Release Notes



Edit Workflow Details

User Experience

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Notification Set:
None (Use Default Notification Set)

Notification Language:
None (Use Default Language)

Public Launch Brand:
None (Use Default Branding)

☒ Prompt Participants for Cancellation Reason

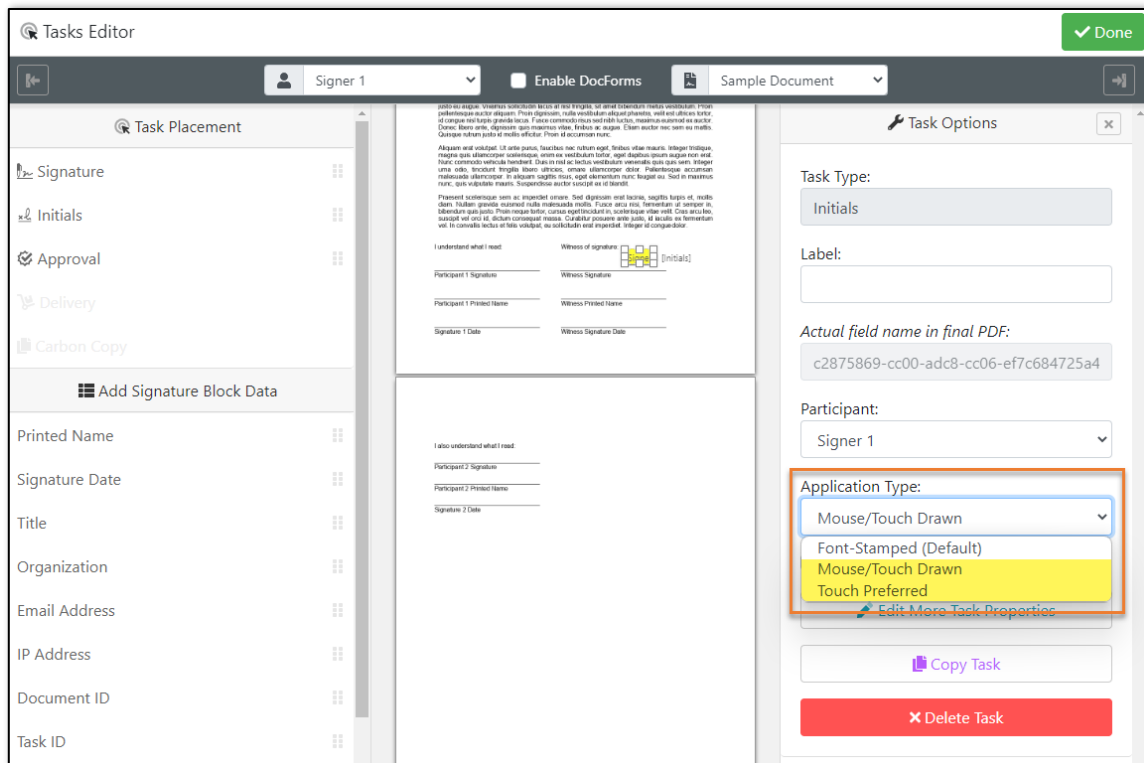
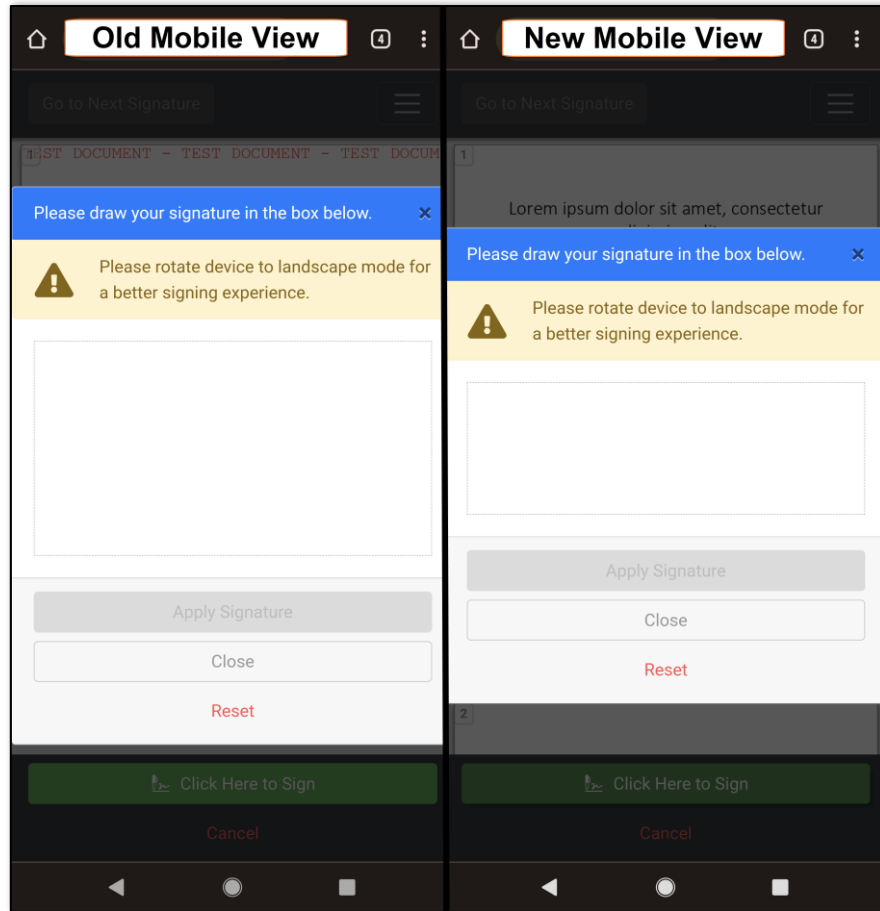
Save as Preset

Cancel

Update Workflow

[PEP-5030] - Fixed issue where the touch/mouse signing canvas made it difficult for users to see the orientation of the document when signing. Adjusted the touch/mouse signing canvas to be a responsive 3/1 ratio for signatures, and a proper 1/1 ratio for initials. Note: This update only affects signing tasks that have the Application Type set to Mouse/Touch Drawn and Touch Preferred. Please reference the images below for a comparison of the old and new touch/mouse signing canvas and the Application Type setting referenced.

Release Notes



[PEP-5029] - Fixed issue where In-Person Participants with "Final Email" enabled would not show the email field at Launch. The Email Address field should have appeared on the Launch screen for the Participant to receive the "Final Email". Images of the Participant setup, launch screen, and error message can be seen below.

Release Notes

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers

User: | Group: MyCompany Inc

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflow Setup

Label/Description: Sample Workflow

Participant Setup

Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
Signer 1	Full Name entered at launch...	Email Address entered at launch...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

+ Add Participant + Add Me + Add Advanced

es launch Quick Stats

An Error Occurred

Errors for item 1: If an email notification is set to be sent to this Participant then either EmailAddress is required or QueryForEmailAddress must be set to 'true':

PEP-4912 Test

Signer 1 Information

Full Name: test

Start Workflow

Email Address:

Email Address field is missing

v5.15.3 Release

Production Release Date: 8/11/2022

Bug Fixes

[PEP-5158] - Fixed issue for HTML documents where if the CSS link in the <head> tag contained CSS with the word 'error' as selectors in the style, the signing attempts resulted in seeing the error message "process cannot continue". Please see the image below for examples of the word 'error' being used as selectors in the style.

```
--c-button-secondary-disabled-border: transparent;
--c-button-secondary-disabled-text: rgba(245, 245, 246, 0.75);
--c-input-default-base-text: #262F3F;
--c-input-default-base-border: #D9DBDD;
--c-input-default-base-background: #ffffff;
--c-input-default-focus-border: rgba(0, 88, 251, 0.5);
--c-input-default-focus-shadow: rgba(0, 88, 251, 0.3);
--c-input-error-base-text: #BF3D66;
--c-input-error-base-border: rgba(255, 79, 127, 0.5);
--c-input-error-base-shadow: rgba(255, 79, 127, 0.3);
--c-input-error-focus-border: #FF4F7F;
--c-hint-default: rgba(38, 47, 63, 0.55);
--c-hint-success: #00B4A8;
--c-hint-error: #BF3D66;
--c-hint-required: #BF3D66;
--c-line-default: rgba(217, 219, 221, 0.6);
```

v5.15.2 Release

Production Release Date: 8/11/2022

Bug Fixes

Release Notes

[PEP-4982] - Fixed issue where when defining a participant, the Pin/Password field would not display for Authentication. Please see the images below of the Define Participant Workflow Action and Participant Authentication settings referenced and an example of the Define Participant page.

Two screenshots from the 'Edit Participant Details' dialog. The left screenshot shows the 'Workflow Actions' tab with 'Action 1' selected. The 'Type' dropdown is set to 'Define Another Participant'. The 'Participant to Define' dropdown is set to 'Signer 2'. The 'Authentication' checkbox is checked. The 'Two-Factor Authentication' checkbox is also checked. The right screenshot shows the 'Authentication' tab. The 'Type' dropdown is set to 'One-time PIN/Password'. The 'Set permanent password for this workflow' checkbox is unchecked. The 'Use two-factor authentication' checkbox is checked. The 'Second-Factor Authentication' section shows 'Type' set to 'Mobile', 'Credential Name' set to 'TwilioCreds', and 'Set permanent phone number for this workflow' unchecked. The 'Number of phone number characters to leave unmasked' is set to 4. The 'Save the raw response?' checkbox is unchecked. The 'Passcode length' is set to 4.

Define Participant

Enter the information for the Participant below.

Full Name:

Mobile Number:

PIN/Password:

Update Participant Cancel

[PEP-4981] - Fixed issue where when adding and naming a new content, notification, or brand set, if invalid characters were used in the name, it would show an incorrect error message. Please reference the image below for an example of the incorrect error message.

Add Content

Name:

Language:

Enter your username in the format "domain\\user" or "user@domain".

Add Content Cancel

[PEP-4970] - Fixed issue where the time zone set in a user's profile was not being used in the Audit Report when it was downloaded with the Evidence Package zip file. Please see the image below of the Localization settings in a user's profile and an example of an audit report with the incorrect time zone.

Release Notes

The image shows two screenshots from a web application. The top screenshot is the 'Profile Editor' window, specifically the 'Localization' tab. It features a 'Date Format' dropdown set to 'MM/DD/YYYY' and a 'Time Zone' dropdown set to '(UTC-05:00) Eastern Time (US & Canada)'. An orange box highlights these two dropdowns, and an orange arrow points from this box down to the 'Created' and 'Completed' fields in the screenshot below. The bottom screenshot is the 'Document Audit Report' for 'NDA Internal Version'. It displays document details: Document ID (2000470298), Transaction ID (2000266094), Type (PDF Document), and Status (Completed). The 'Created' field shows '2022-06-07 7:31 UTC' and the 'Completed' field shows '2022-06-07 7:32 UTC'. Both of these time fields are highlighted with an orange box.

Profile Editor

Basic Information
Signature Image
Password
Localization

Localization

Date Format:
MM/DD/YYYY

Time Zone:
(UTC-05:00) Eastern Time (US & Canada)

Cancel Update Profile

Document Audit Report

MyCompany Inc.

Document Title: NDA Internal Version

Document ID: 2000470298

Transaction ID: 2000266094

Type: PDF Document

Status: Completed

Created: 2022-06-07 7:31 UTC

Completed: 2022-06-07 7:32 UTC

[PEP-4969] - Fixed issue where the Define Participant Workflow Action Type wasn't displaying in the Transaction Status Reports. Please see the image below of where the Workflow Actions in the Transaction Status is located and an example of the Workflow Action missing the Workflow Action Type.

The image shows a screenshot of the 'reports / status' page in the MyCompany Inc. application. The page has a navigation bar with 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The 'Reports' section is active, and the 'Participants' tab is selected. The main content area shows 'Search Results > Transaction Details: Participants' for 'MyCompany NDA' with transaction ID '2000266094'. Below this, there's a section for 'PARTICIPANT: jane doe' with details like Participant ID (1000180909), Transaction ID (2000266094), Status (Completed / 4), Full Name (jane doe), and Role (Vendor Signer). A 'Workflow Actions' link is highlighted with an orange box and an orange arrow pointing to a modal window. The modal window, titled 'Workflow Actions for Participant ID: 1000180909', shows 'THERE IS 1 WORKFLOW ACTION IN THIS Participant' and lists a 'WORKFLOW ACTION: Define Participant' with a 'Type' field highlighted by an orange box. The modal also shows the action's Status (Complete), Description (Define Participant), Started Date (2022-06-07 07:31 PM UTC), and Completed Date (2022-06-07 07:31 PM UTC).

MyCompany Inc.

Dashboard Reports Workflow Designer Account Developers

reports / status

Transaction Documents Participants Emails Audit Report Event History

Search Results > Transaction Details: Participants

MyCompany NDA
2000266094

Void Transaction

PARTICIPANT: jane doe

Participant ID: 1000180909

Transaction ID: 2000266094

Status / ID: Completed / 4

Full Name: jane doe

Send Request via Email: false

Role: Vendor Signer

Created: 2022-06-07 07:31 PM UTC

Completed: 2022-06-07 07:32 PM UTC

Workflow Actions: [View 1 Participant Workflow Action](#)

THERE IS 1 TASK IN THIS DOCUMENT

Signature: NDA Internal Version

Workflow Actions for Participant ID: 1000180909

THERE IS 1 WORKFLOW ACTION IN THIS Participant

WORKFLOW ACTION: Define Participant

Type:

Status: Complete

Description: Define Participant

Started Date: 2022-06-07 07:31 PM UTC

Completed Date: 2022-06-07 07:31 PM UTC

[PEP-4949] - Fixed issue where the signing UI would render slowly for SMS signing links. Increased page load performance when using SMS links, so that they load/redirect faster.

Release Notes

[PEP-4948] - Fixed issue where when adding an event subscription, the error message for an invalid phone number was incorrect. Please reference the image below for an example of the incorrect error message.

The screenshot shows a form titled "Subscription 2" with a "Delete" button. The "Type" dropdown is set to "Skipped Document Event". Below it are radio buttons for "Webhook", "Email", and "SMS" (which is selected). The "Phone Number" field contains the text "Test" and is highlighted with a red border. To the right of the field, a red error message reads: "Enter your username in the format 'domain\user' or 'user@domain'".

[PEP-4927] - Fixed issue where deprecated database references, Pronto_ProcessTemplates database, were still in the Installation guide. The deprecated database references were removed. Note: The v4 control panel database references were previously removed, but the references in the database were still present.

[PEP-3373] - Fixed issue where a Transaction containing a participant with a carbon copy task, on an uploaded document, would get stuck and the second participant would not receive an email with the signature link. Please see the image below for more details.

The screenshot shows the "Workflow Setup" interface. The "Label/Description" field contains "test carbon". Below it is the "Participant Setup" section with a table of participants. An orange box highlights the first participant, "Identifier", and an orange arrow points from it to the "Tasks Editor" section. The "Tasks Editor" section shows a table of tasks. An orange box highlights the first task, "Sig 1", which is a "Carbon Copy" task assigned to the "Identifier" participant.

Reorder	Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
1	Identifier	Full Name entered at launch...	Email Address entered at launch...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	Client	Full Name entered at launch...	Email Address entered at launch...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Label	Task Type	Placeholder Type	Placeholder/Position	Participant	Options
Sig 1	Carbon Copy	N/A	N/A	Identifier	
Client	Signature	Search Text	Signature:	Client	

v5.15.1.1 Release

Production Release Date: 7/14/2022

Bug Fixes

[PEP-5084] - Fixed issue where Event Subscription Webhooks would retry only for a maximum of three times regardless of the retry-limit set.