

Release Notes

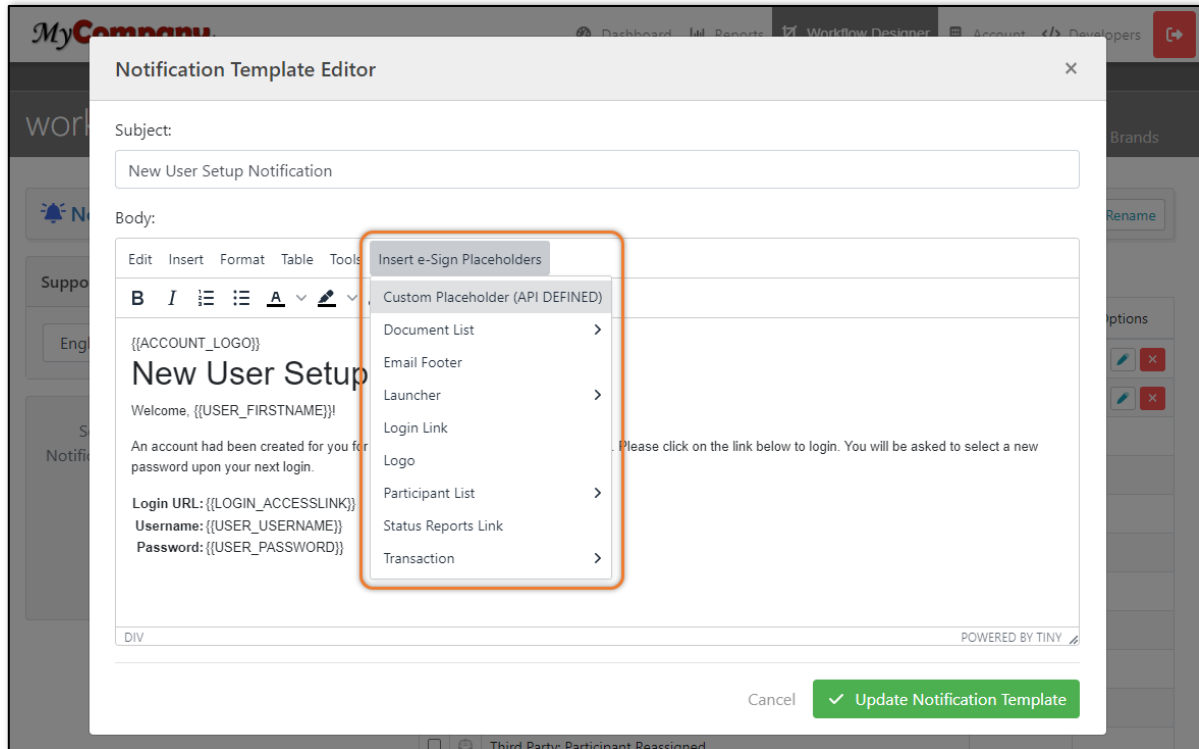
v5.17.2 Release

Release Date: 8/3/2023

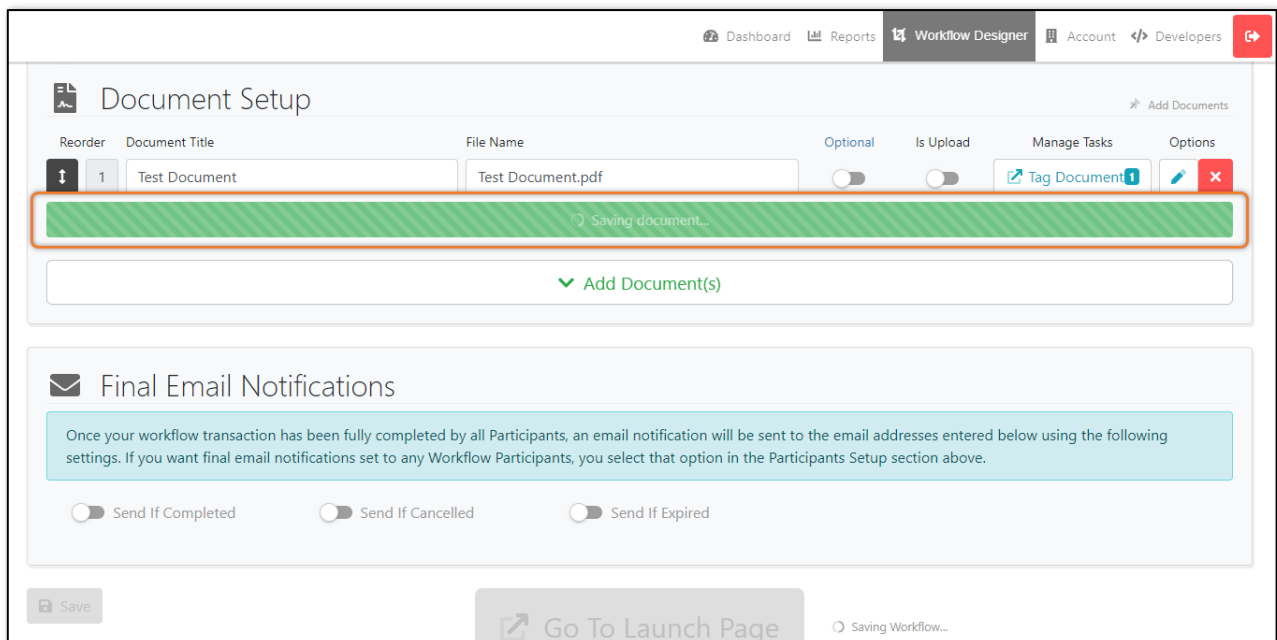
Bug Fixes

[PEP-7057] - Fixed issue where licensing failed during the installation process because it could not read/write configuration settings properly.

[PEP-7044] - Fixed issue where some placeholders were not being shown or shown incorrectly as options in the Workflow Designer > Notifications editor. Please see the image below for the referenced setting.



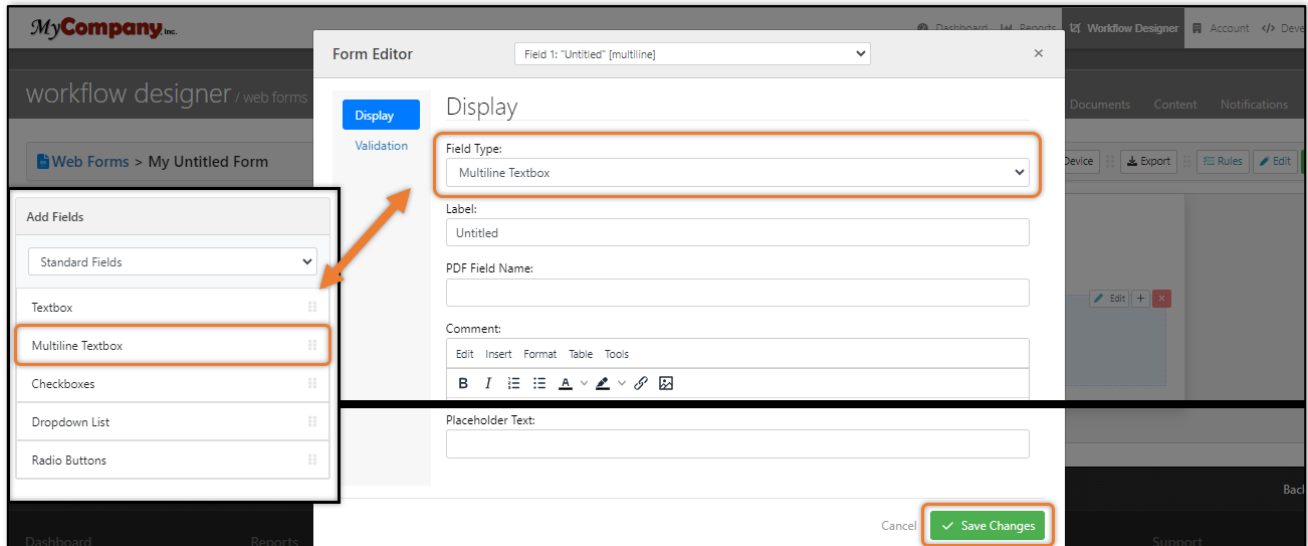
[PEP-7034] - Fixed issue where document saving and preset application indicators were not showing. Please see the image below for an example of the saving indicator referenced.



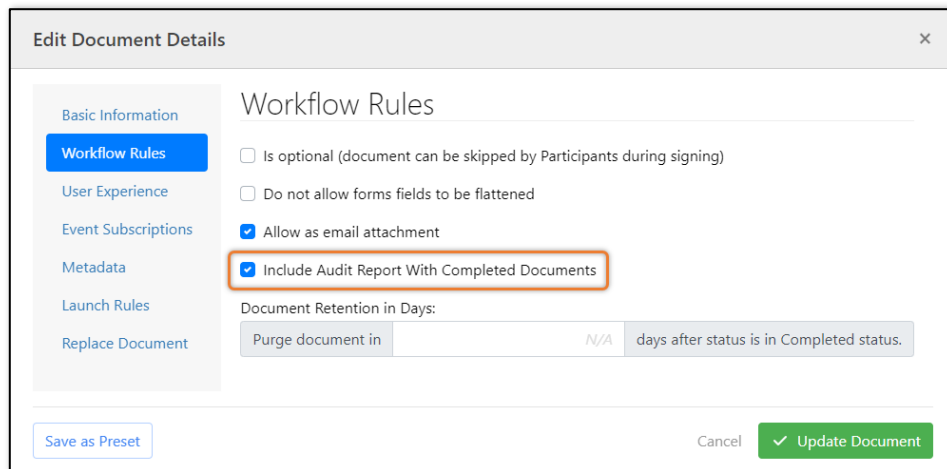
[PEP-7015] - Fixed issue where the ADFS login page would not load correctly.

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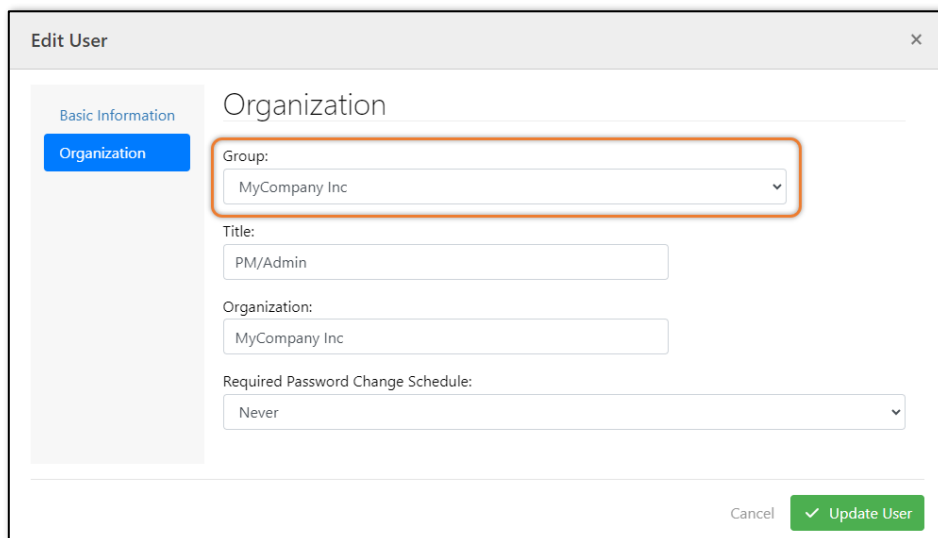
[PEP-7013] - Fixed issue where Multiline Textboxes, in a Web form, would not save correctly when clicking on the *Save Changes* button. Please see the image below for more details.



[PEP-7012] - Fixed issue where final email notifications were not being sent out when the Audit Report was set to be included. Please see the image below for the referenced setting.

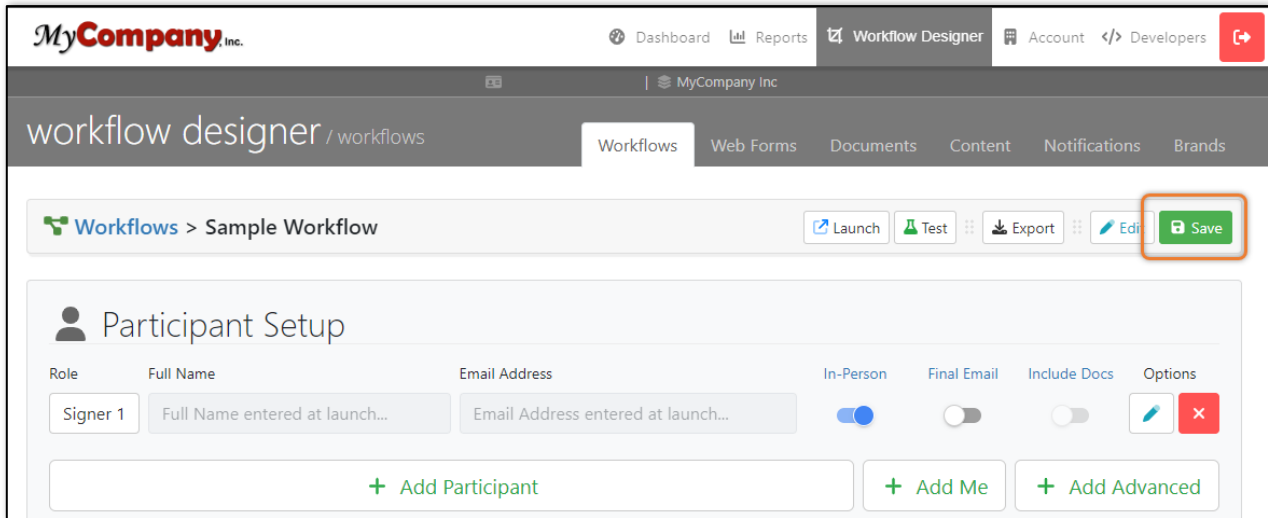


[PEP-7011] - Fixed issue where a users' group could not be updated and or changed to another group or sub-group. Please see the image below for the referenced setting.



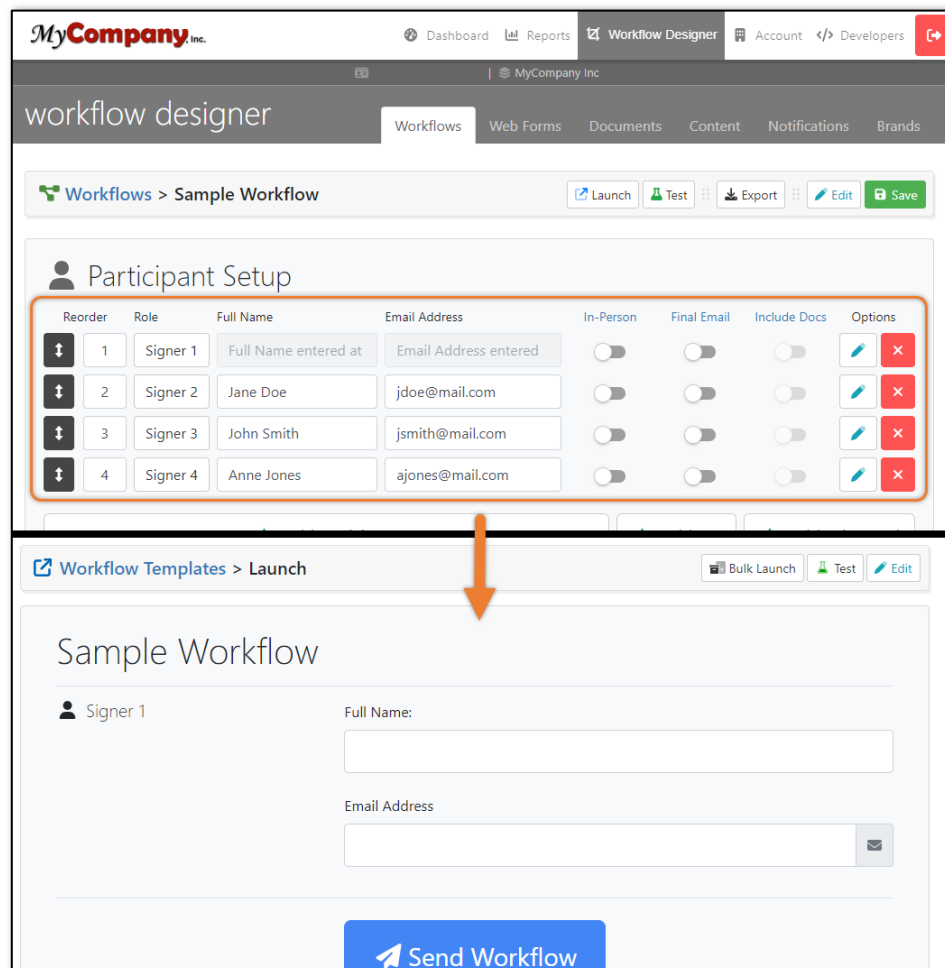
Release Notes

[PEP-7009] - Fixed issue where when editing a workflow, the save button would prematurely be available. Please see the image below for the save button referenced.



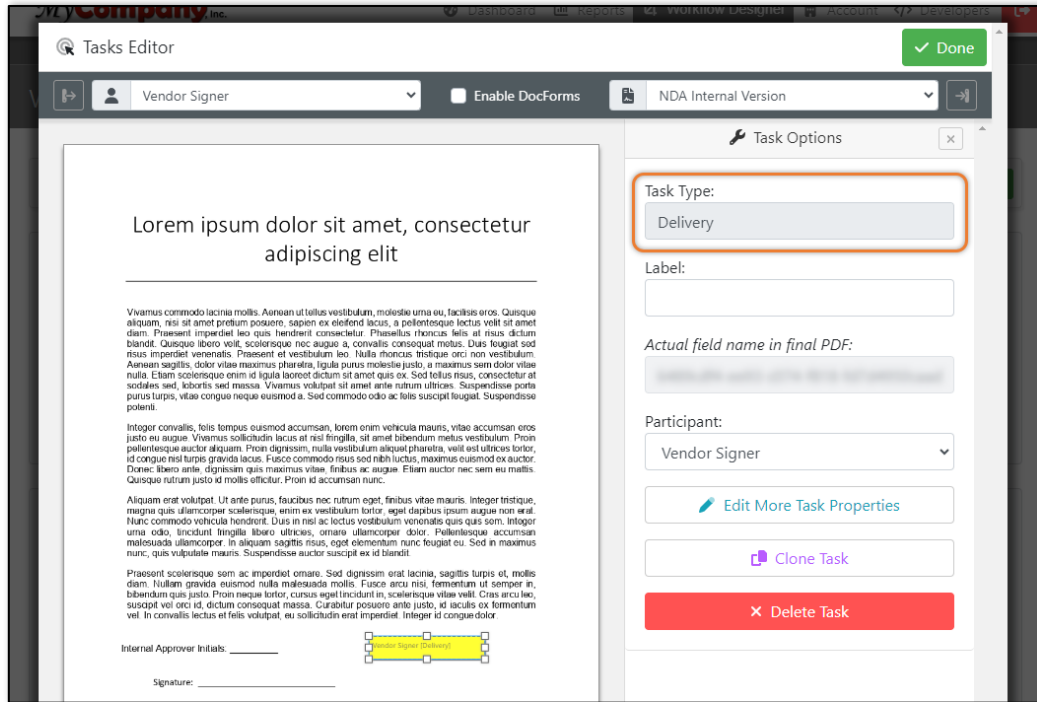
[PEP-6987] - Fixed issue where there were intermittent issues of documents failing to save in the one-minute timeout. Increased the saving timeouts for documents to reduce the chance of timeout errors.

[PEP-6977] - Fixed issue where additional border dividers appeared for participants that aren't displayed on the Workflow Launch page. Please see the example settings and Launch page below that appear without additional dividers.



[PEP-6943] - Fixed issue where a transaction with a delivery-only document would not complete if the digital signature process failed. Please see the image below for the referenced setting.

Release Notes



v5.17.1 Release

Release Date: 7/17/2023

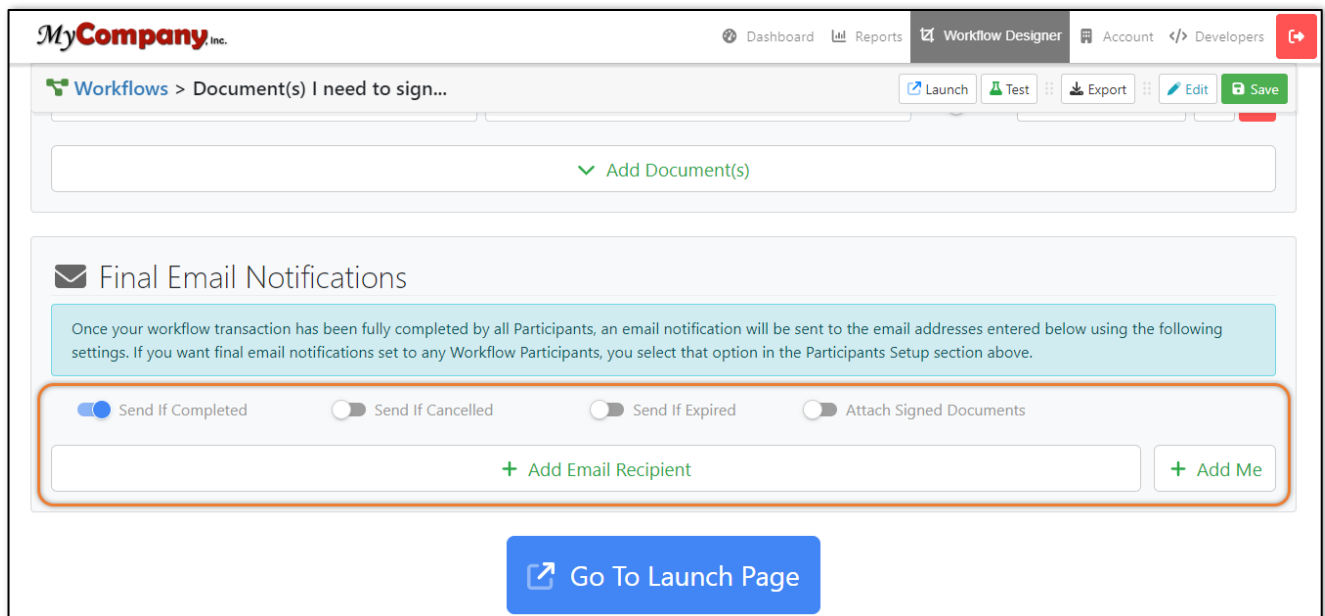
Important Notes:

The following items are considered breaking changes. Please see the details and link below for more information.

- [PEP-6657] - Fixed issue where outdated security protocols, TLS 1.0/1.1, were being used in the installer. Deprecated TLS 1.0/1.1 for the installer.
 - <https://csrc.nist.gov/publications/detail/sp/800-52/rev-2/final>

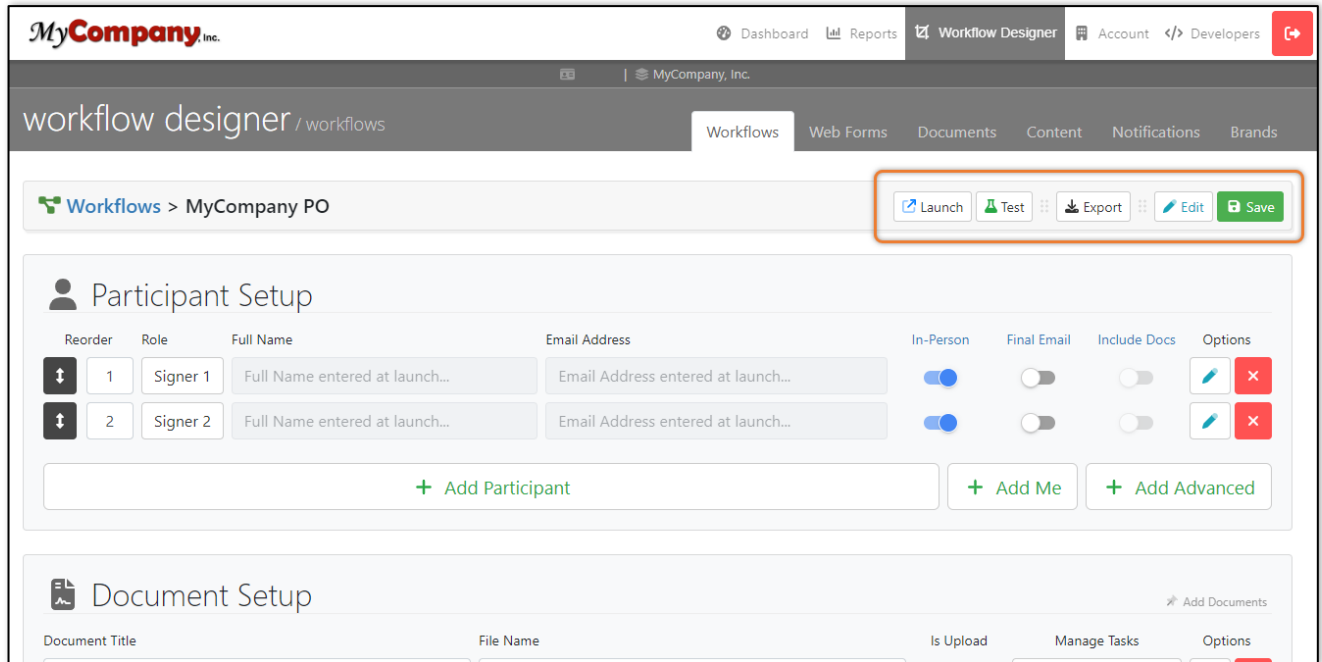
Bug Fixes

[PEP-7004] - Fixed issue where when clicking on the Final Email Notifications toggles, some workflows would show a 'Vue is not defined' error, and users were unable to add email recipients from the workflows page. Please see the image below for more details.



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[PEP-6996] - Fixed issue where if a request timeout occurred when editing a workflow, the buttons on the page would incorrectly disable permanently. Please see the image below for the buttons referenced.



[PEP-6994] - Fixed issue where errors were seen with some firewalls due to patch requests not contain anything in the request body.

[PEP-6973] - Fixed issue where tasks in a workflow would not navigate correctly if they all had NotRequiredAfterFirstOccurrence set to true.

[PEP-6970] - Fixed issue where the Configuration application would paste items twice, inserting at the cursor and at bottom of text box.

[PEP-6660] - Fixed issue where non-launchable workflows can be retrieved via the GetWorkflowsList() API call.

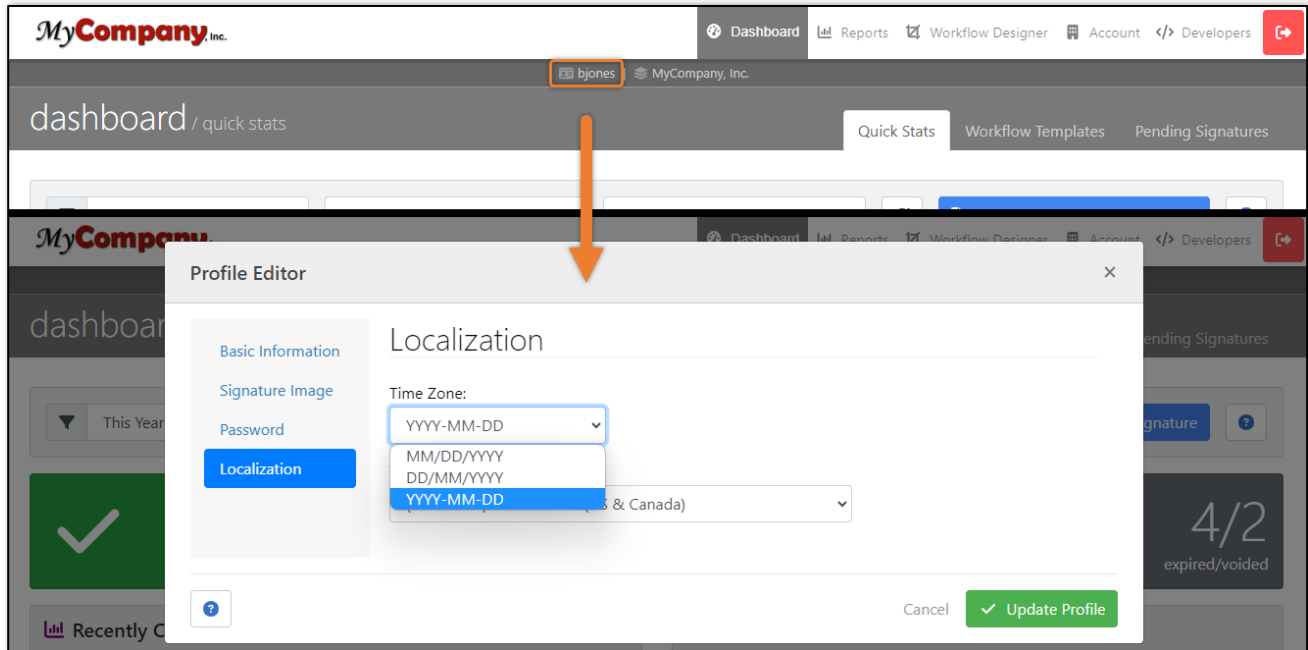
[PEP-6657] - Fixed issue where outdated security protocols, TLS 1.0/1.1, were being used in the installer. Deprecated TLS 1.0/1.1 for the installer.

[PEP-6476] - Fixed issue where users were getting permission errors when using ProntoIDs that aren't identical to the values in the database. Removed case sensitivity of the ProntoID in the GetWorkflowList() API call.

[PEP-6359] - Fixed issue where loading animations may cause confusion for Participants in the Signing UI. Added subtle "arrow" inside the loading spinner indicating that you are leaving the signing UI website.

[PEP-5333] - Fixed issue where date formats selected in the User Profile were not reflected on audit reports. Applied profile date formats and AM/PM to Audit Report PDF dates. Please see the image below for the referenced setting.

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[PEP-1676] - Fixed issue where multiple participants PIN/Passwords would show after clicking on the show PIN/Password option after launching a workflow. Only the selected participant's PIN/Password should appear. Please see the image below for the referenced setting and an example of the participant PIN/Password.

Release Notes

The screenshot shows the 'MyCompany PO' workflow configuration page. At the top, an 'Edit Participant Details' modal is open, displaying the 'Authentication' tab. The 'Type' dropdown is set to 'One-time PIN/Password'. Below this, there are checkboxes for 'Set permanent password for this workflow' and 'Use two-factor authentication'. An orange arrow points from the 'One-time PIN/Password' dropdown to the 'PIN/Password' field of 'Signer 1' on the main page. The main page shows two signers: 'Signer 1' (Jane Doe) and 'Signer 2' (John Smith). Both have 'PIN/Password' fields. A callout box next to Signer 1's field states: 'After clicking on the show PIN/Password option, only the first PIN/Password should show.' The 'Start Workflow' button is at the bottom.

v5.17.0.1 Release

Release Date: 7/5/2023

Bug Fixes

[PEP-6953] - Fixed issue where Experian out-of-wallet authentication was failing for product code 18. Please see the image below for the referenced integration setting.

The screenshot shows the 'Add Integration' modal. The 'Integration' tab is selected. There is a checkbox for 'Account-Wide (shared to all other Groups and Sub-Groups if applicable)'. Below this is the 'Integration Name' field. The 'Provider' dropdown is open, showing a list of providers. The 'Knowledge-Based Authentication' provider is selected, and its sub-option 'Experian PreciseID' is highlighted. Other providers visible include 'Lexis Nexis' and 'Mobile Authentication'. The 'AddIntegration' button is at the bottom right.

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v5.17.0 Release

Release Date: 6/29/2023

Important Notes:

- [PEP-5903] - Moved the location of the shared config settings to the database and removed the settings from the prontoconfig.ini using the installer. The prontoconfig.ini is no longer used and a new desktop app will be used in its place. These settings will be stored centrally in the database and will update all servers when any changes are saved. *Please note:* The database update needs to run before the installer runs in order for the configuration conversion (from ProntoConfig.ini file to database) to complete successfully.

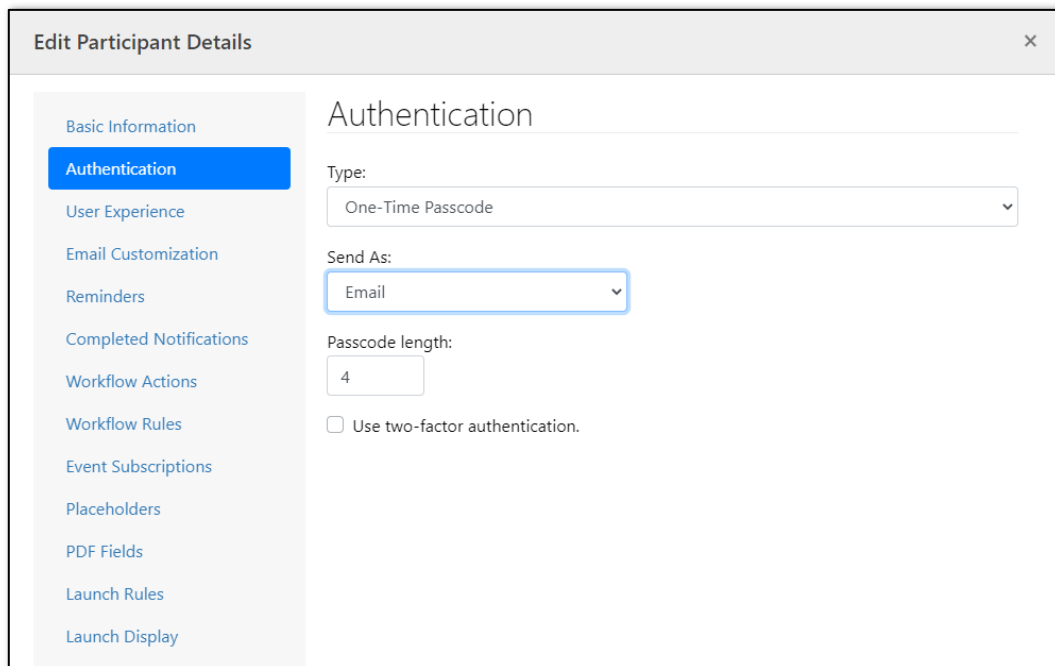
New Features

[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 a window titled "Edit Participant Details" with a close button in the top right. On the left is a sidebar with the following items: Basic Information, Authentication (highlighted in blue), User Experience, Email Customization, Reminders, Completed Notifications, Workflow Actions, Workflow Rules, Event Subscriptions, Placeholders, PDF Fields, Launch Rules, and Launch Display. The main area is titled "Authentication" and contains the following fields:

- Type: A dropdown menu with "One-Time Passcode" selected.
- Send As: A dropdown menu with "Email" selected.
- Passcode length: A text input field containing the number "4".
- Use two-factor authentication: An unchecked checkbox.

[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 YearGroup TransactionsAll GroupsSend 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	Completed

Recently Updated Workflows Templates

Workflow Template Launch	Options
Sample Workflow	

MyCompany Inc.

Dashboard Reports Workflow Designer Account Developers

reports / status

Status Trends Completion Rates Verify Document

Advanced Search

Search ForTransactions

Search TextSearch by Transaction ID or description...

StatusComplete

Transaction CreatorGroup Transactions

Date Range2023-01-01 ~ 2023-06-23

Date TypeCreated

Search LocationAll Groups

Test TransactionsExclude Tests

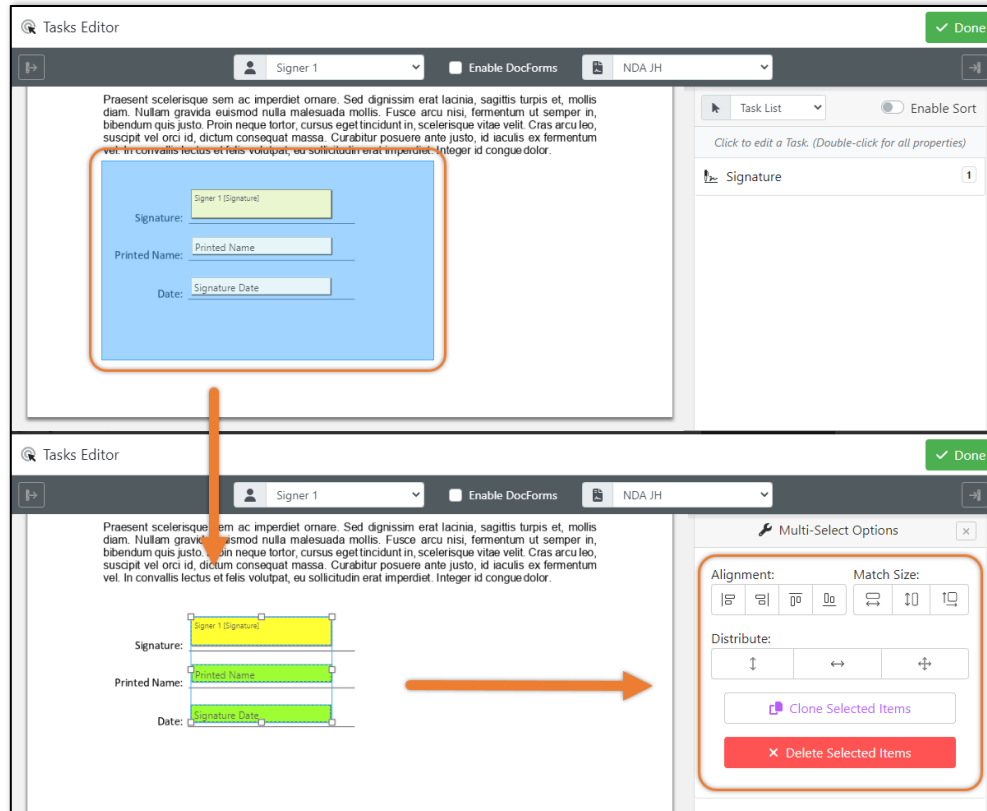
Search

Reset Filters

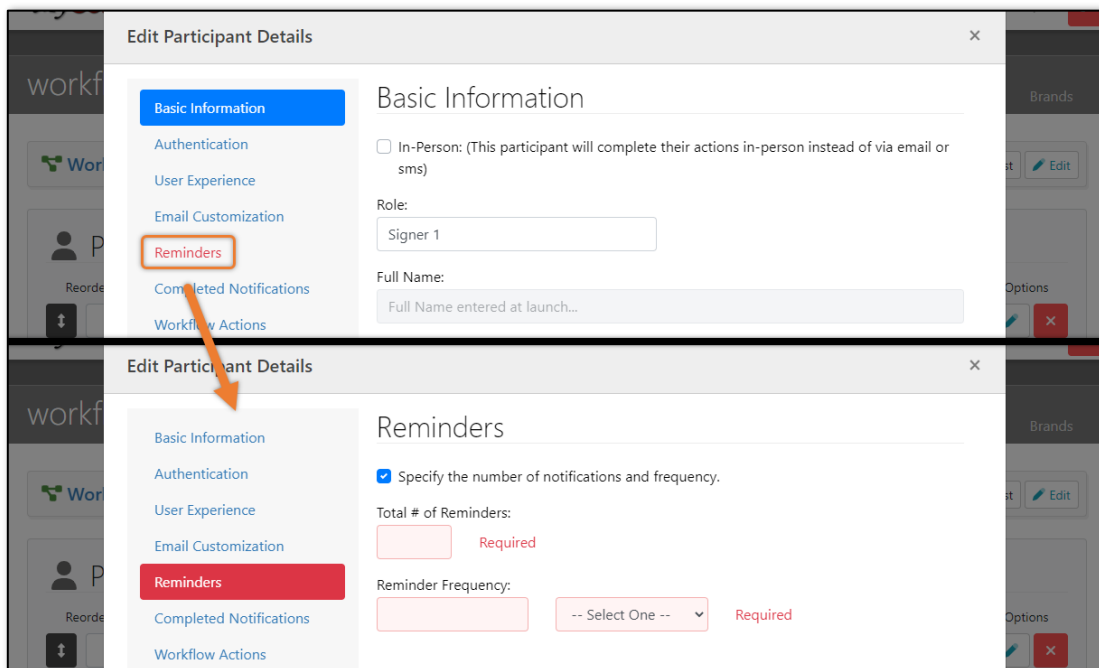
Transaction ID	Description	Group	Created Date	Status	Closed Date	Options
1000251832	Simple Test	My Company Internal	2023-01-03 09:12 PM UTC	Completed	2023-01-03 09:13 PM UTC	

[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.

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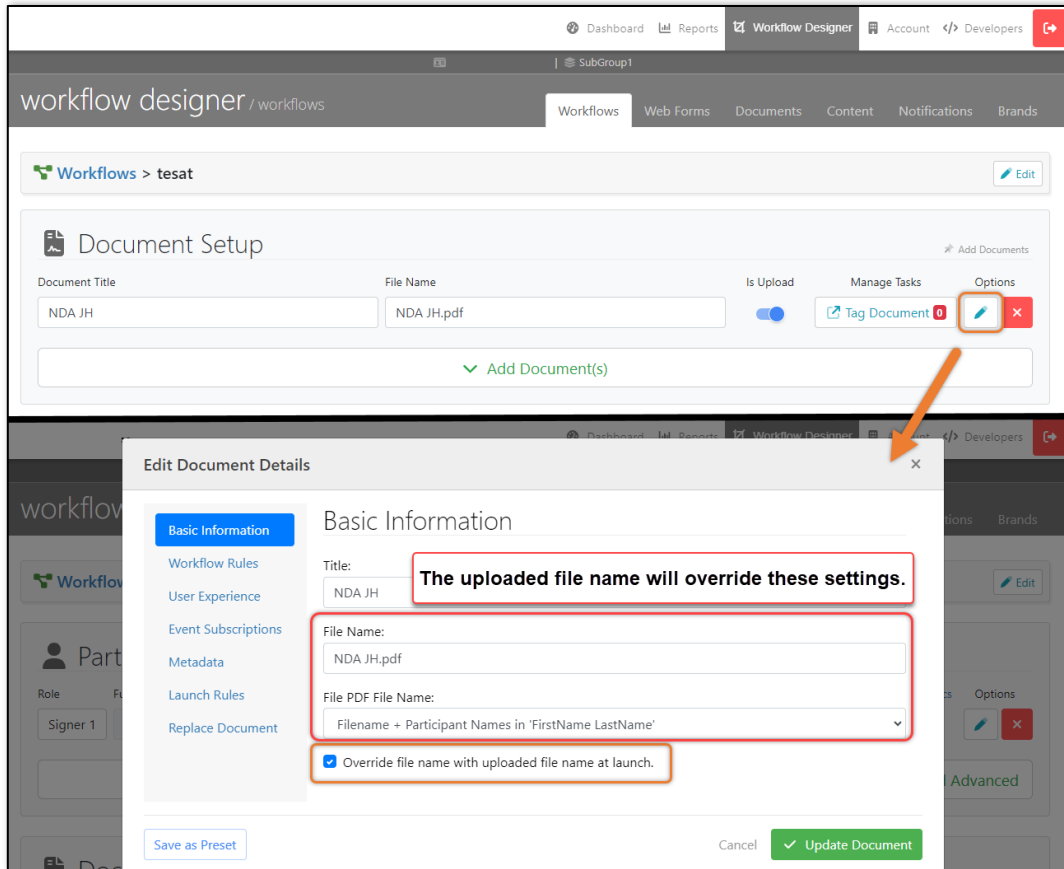


[PEP-6554] - Added Error indications in all editor modal tabs to notify the user when there's an error on active and inactive tabs. This allows the user to see there's an issue and where to go to resolve it when attempting to save any updates. Please see the example image below for additional details.

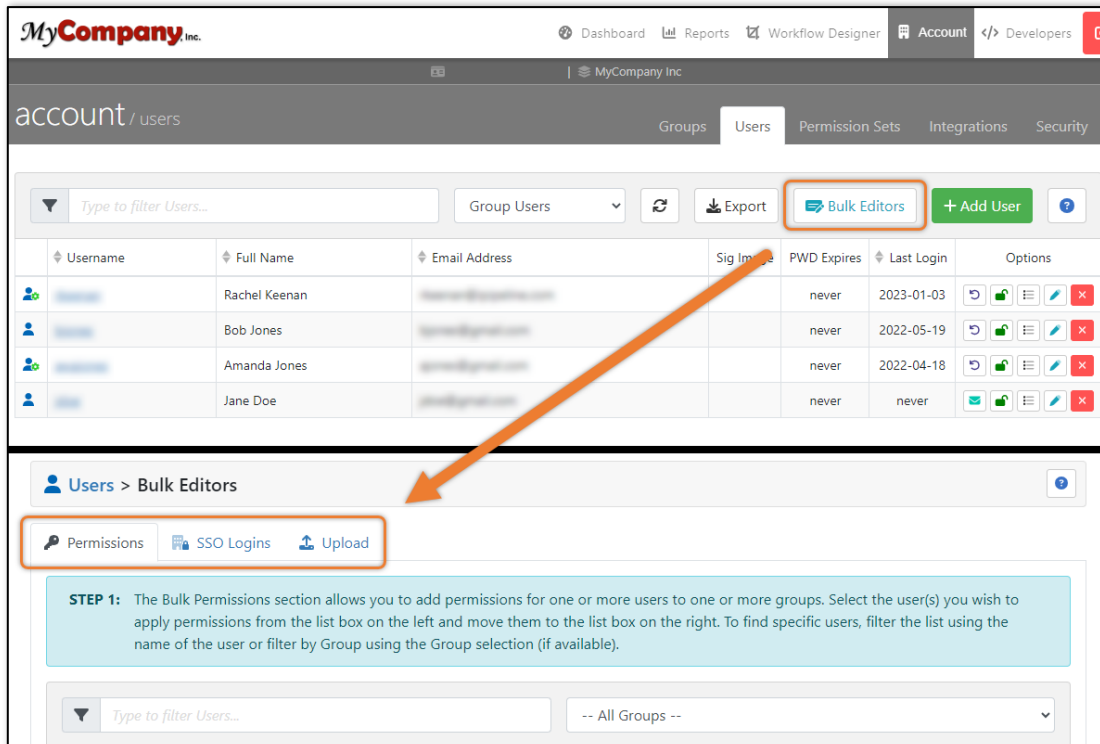


[PEP-6473] - Added the ability for the uploaded document file name to override the Document File Name set in the Workflow Document Details. Please see the image below for additional information.

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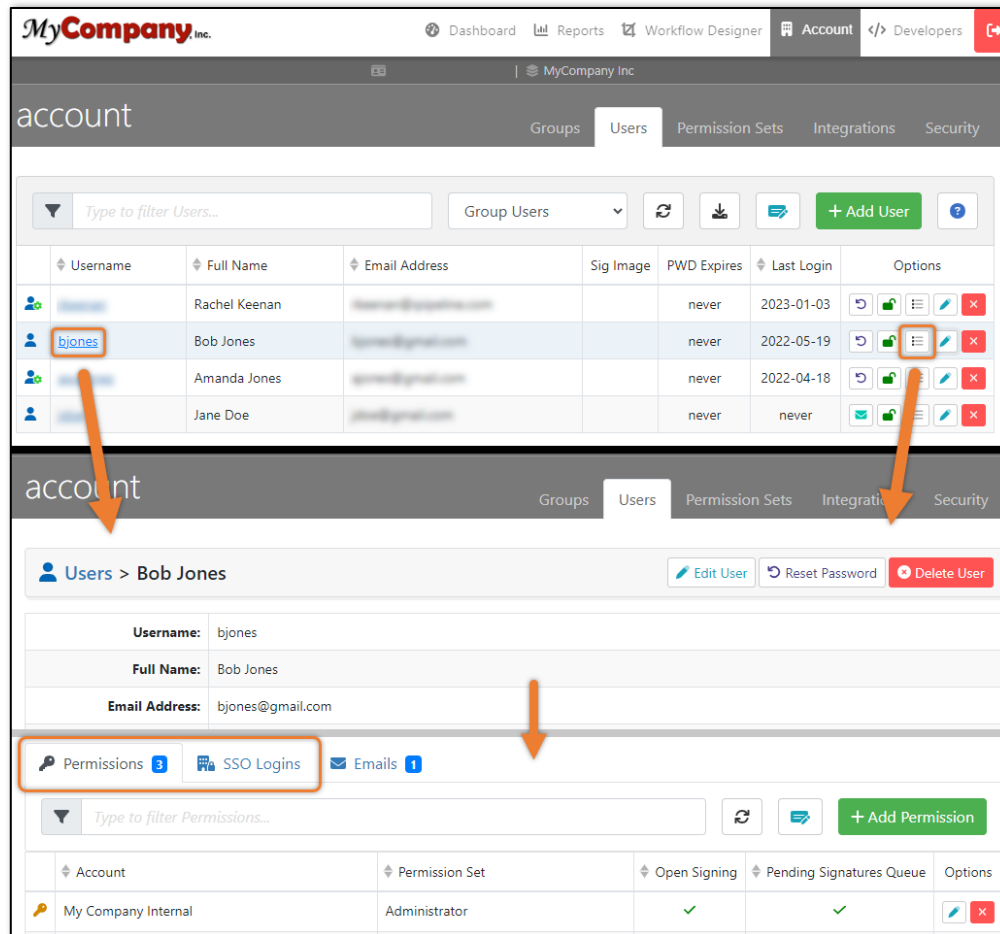


[PEP-6245] - Centralized bulk user editors into one location and added a Bulk SSO Logins option. Bulk Permissions, Bulk User Upload, and Bulk SSO Logins are now located in the Bulk Editors section. Please see the image below for more details.



[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.

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[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 the 'Basic Information' tab selected. The form contains the following fields: Username (pre-filled with 'bjones@gmail.com'), First Name (empty, with a red 'Required' label), Last Name (empty, with a red 'Required' label), Mobile Number (empty), Title (empty), and Organization (empty). The 'First Name' and 'Last Name' fields are highlighted with red borders. At the bottom right, there are 'Cancel' and 'Update Profile' buttons.

[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>.

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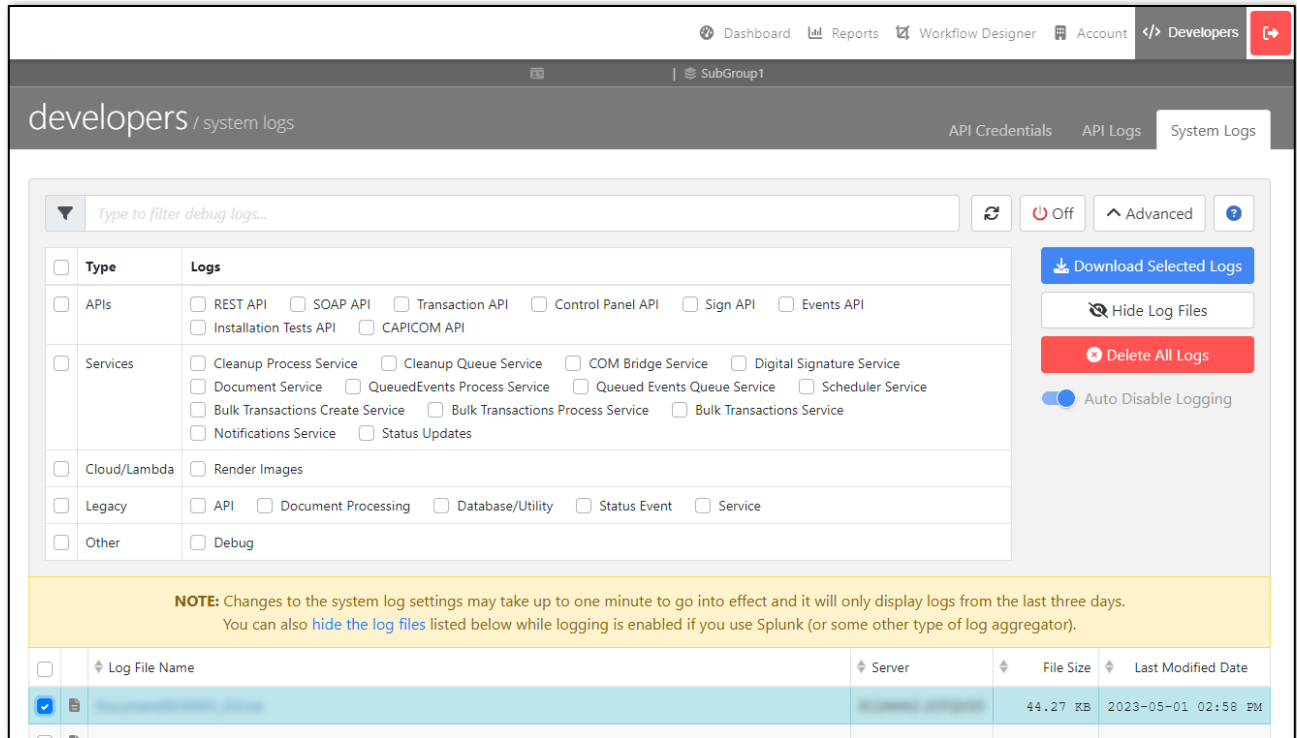
[PEP-6149] - Added the ability to reorder Workflow Actions for Participants and Document Tasks. This ability was also added to Web Form options for Radio Buttons, Checkboxes, and Dropdown Lists. Please see the examples for Workflow Actions and Web Form options in the images below.

The screenshot shows the 'Edit Participant Details' dialog with a sidebar on the left containing links: Basic Information, Authentication, User Experience, Email Customization, Reminders, Completed Notifications, Workflow Actions (highlighted in blue), Workflow Rules, and Event Subscriptions. The main area is titled 'Workflow Actions' and lists two actions. 'Action 1' has a type of 'Process Explanation' and 'Action 2' has a type of 'Document Review'. Each action has a reorder icon (two vertical arrows) and a 'Delete' button. At the bottom, there is an 'Add Workflow Action' button and a 'Show Advanced' checkbox.

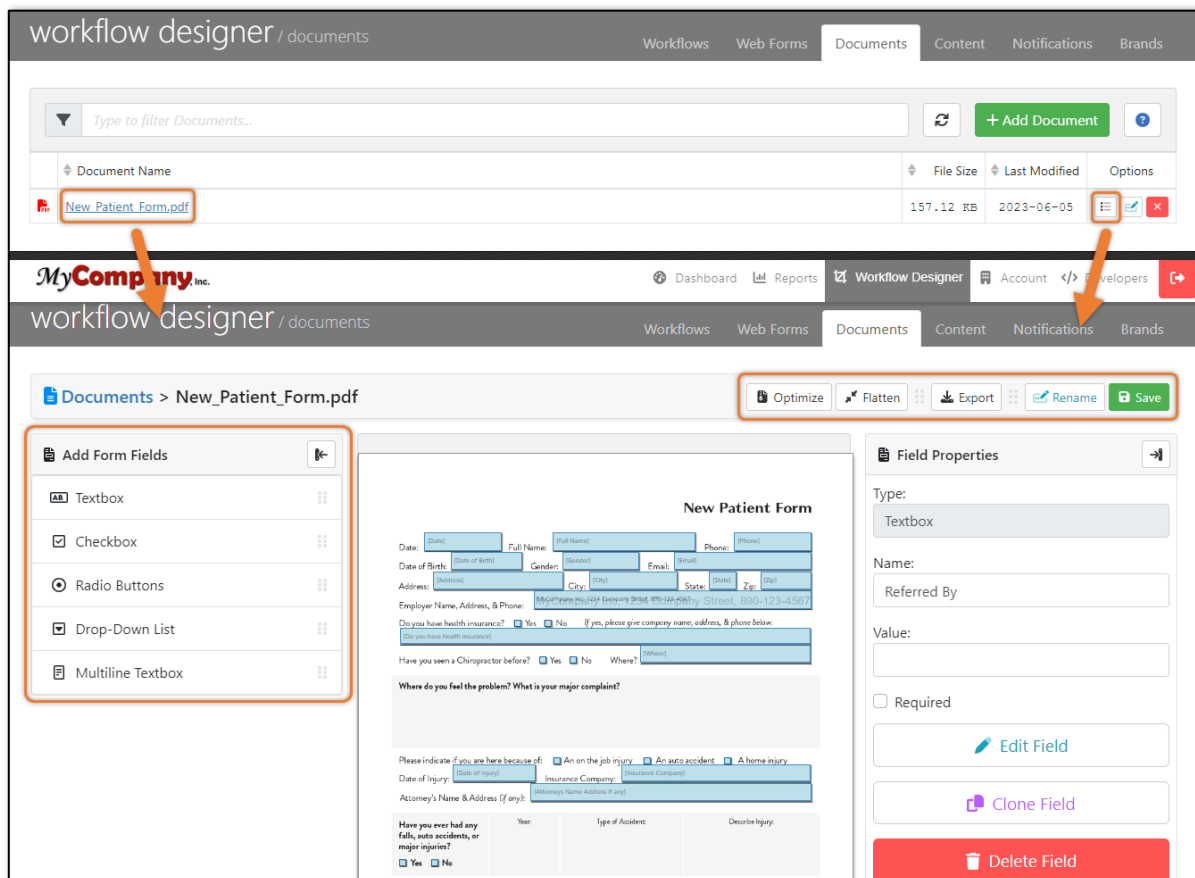
The screenshot shows the 'Form Editor' dialog for a field named 'Field 1: "Example Check List" [checkbox]'. The sidebar on the left has links: Display, Options (highlighted in blue), and Validation. The main area is titled 'Options' and lists two options. 'Option 1' has a label 'Item 1' and 'Option 2' has a label 'Item 2'. Each option has fields for 'PDF Field Name' and 'Data' (set to 'Yes'), and a 'Default check state' checkbox. Each option has a reorder icon and a 'Delete' button. At the bottom, there is an 'Add Option' button. At the very bottom of the dialog are 'Cancel' and 'Save Changes' buttons.

[PEP-6118] - Added new log settings, added max logs display to 3 days, added option to not show logs in the CP UI in case using Splunk or some other log aggregator. Please see the image below for more information.

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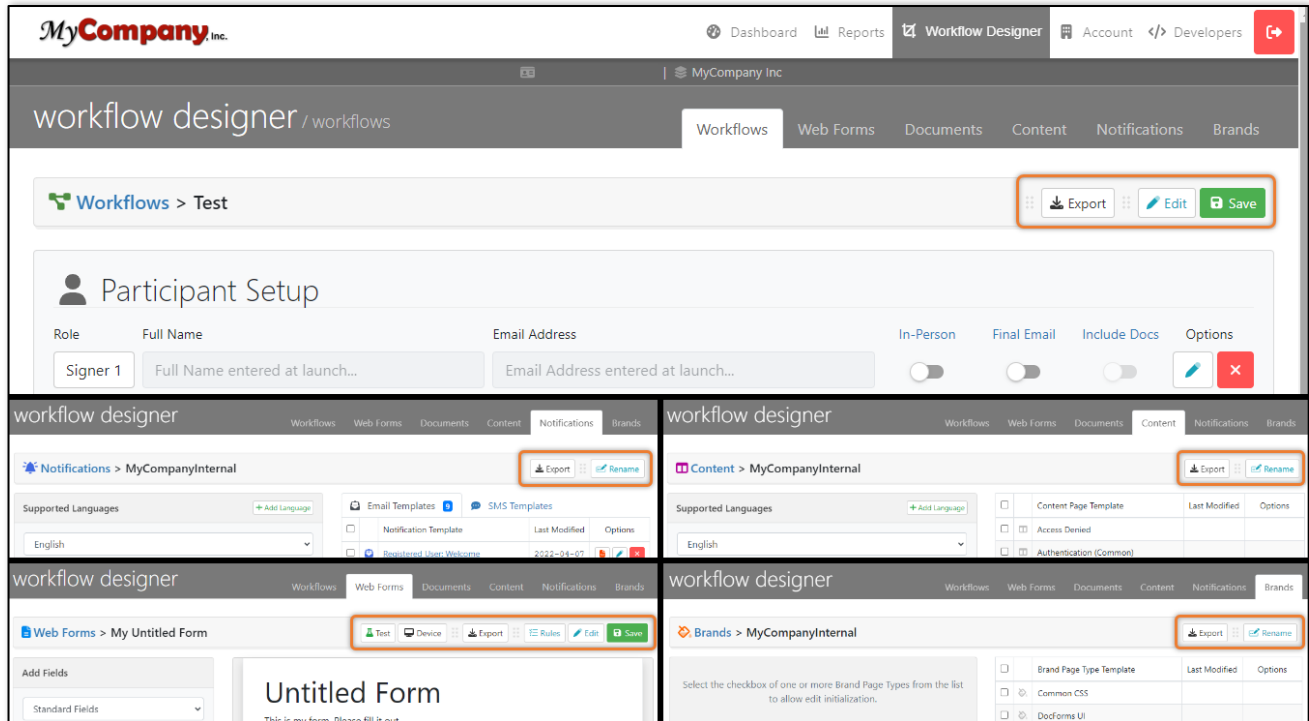


[PEP-6026] - Enabled editing of PDF Documents in the Workflow Designer > Documents tab. This includes options to add/edit fields within the PDF, save changes directly to the PDF file, and the ability to optimize and flatten PDFs. Please see the image below for the settings and options referenced.

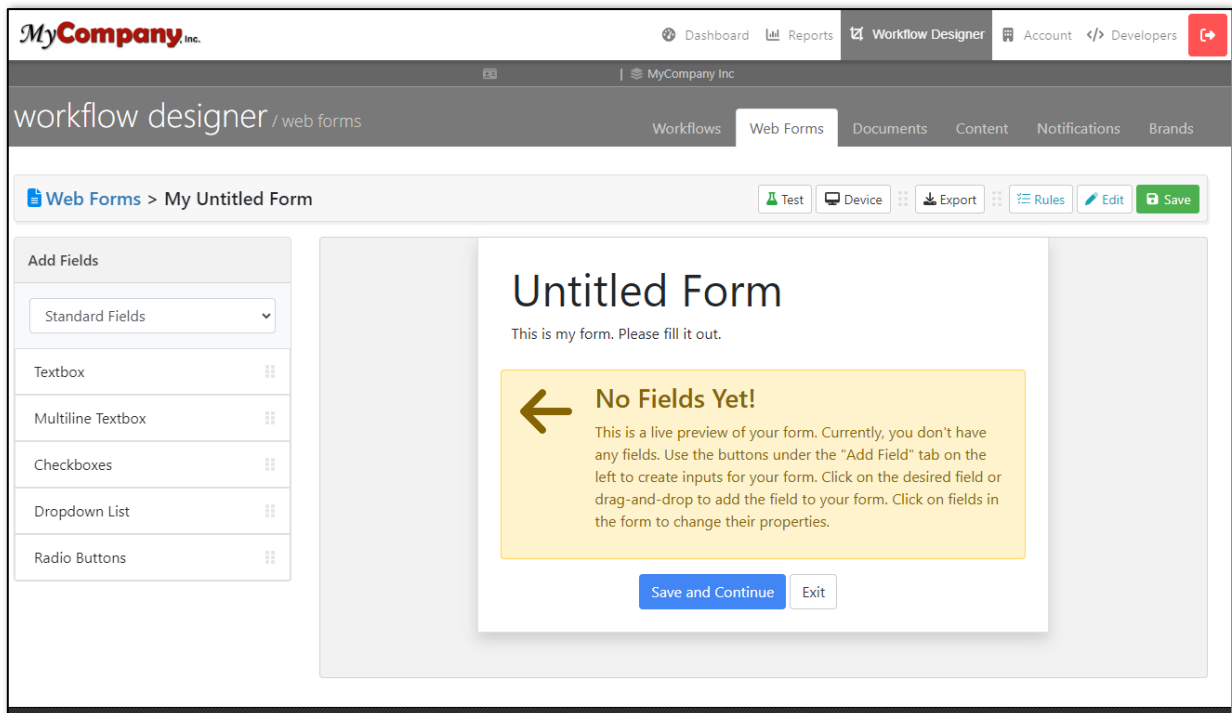


[PEP-6025] - Updated the UI for Workflow Setup, Content, Notifications, Web Forms, and Brand pages to be more consistent with other new UI updates. Please see the image below for more details.

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



[PEP-5933] - Removed the old Signing UI from the ProntoConfig.ini. The new Signing UI will automatically be used. The ability to revert to the old Signing UI will no longer be available. For additional details, please reference Jira, PEP-5497.

[PEP-5903] - Moved the location of the shared config settings to the database and removed the settings from the prontoconfig.ini using the installer. The prontoconfig.ini is no longer used and a new desktop app will be used in its place. These settings will be stored centrally in the database and will update all servers when any changes are saved. Please see the images below for more details. *Please note:* The database update needs to run before the installer runs in order for the configuration conversion (from ProntoConfig.ini file to database) to complete successfully. Please see the image below of the new desktop app.

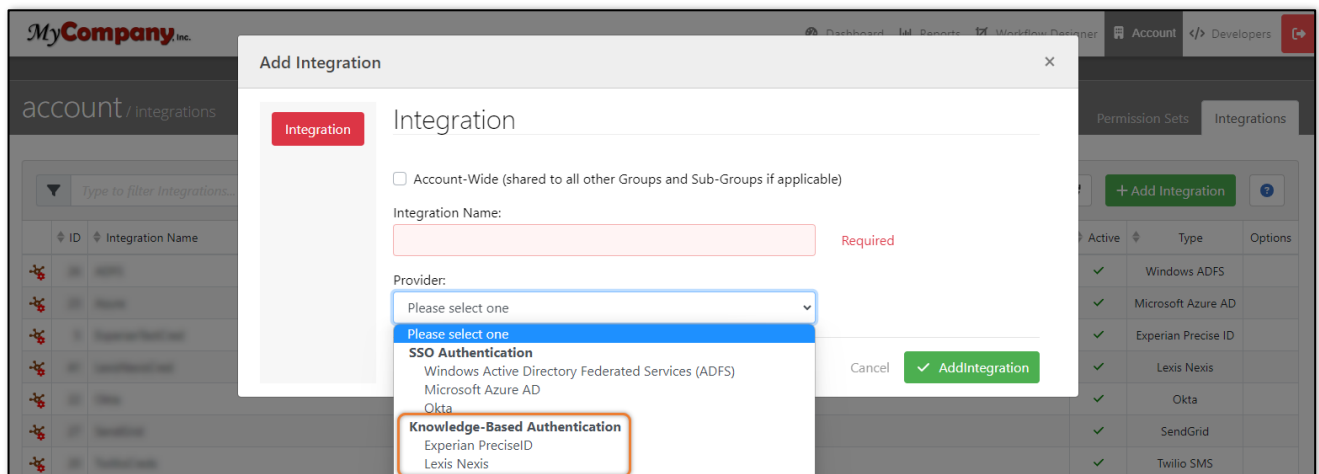
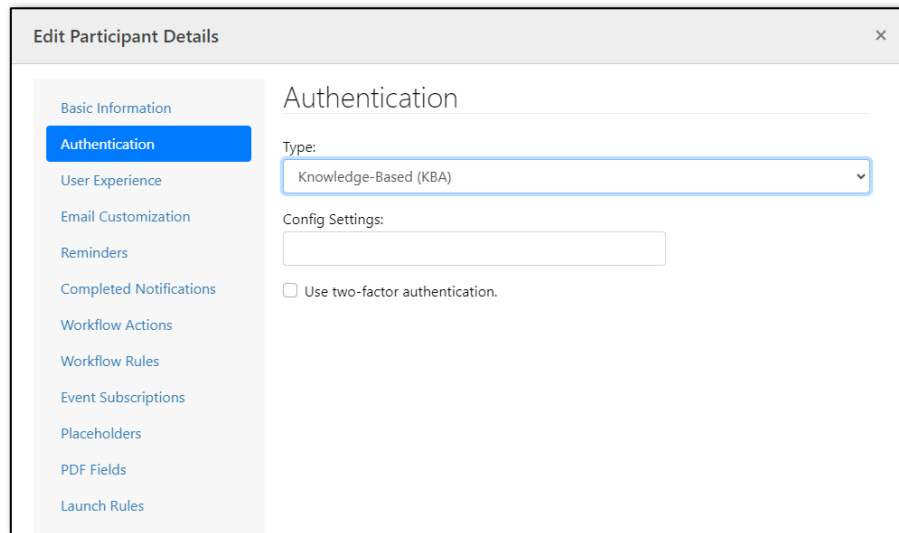
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[PEP-5826] - Moved the stats update from the SQL update script to a separate optional script.

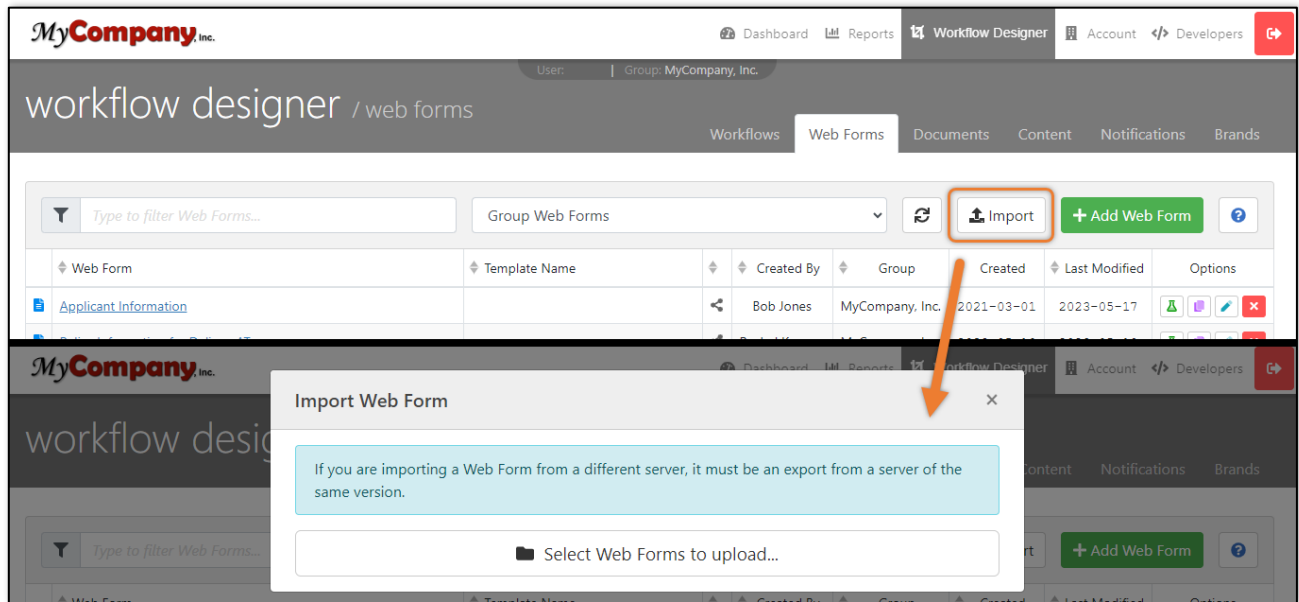
Bug Fixes

[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.

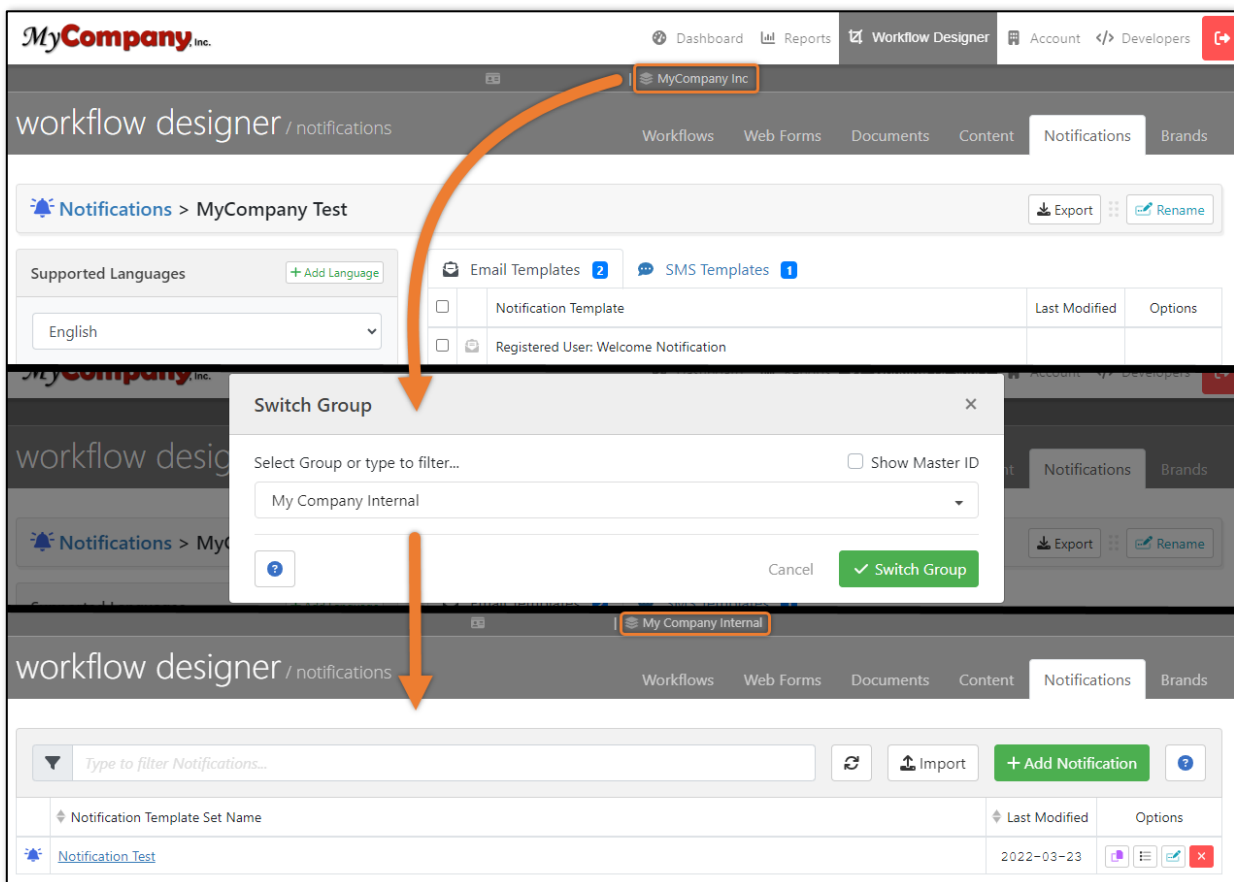


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[PEP-6759] - Fixed issue where if a user closed an upload modal without completing an upload, the previously selected file list would remain instead of being cleared once the modal was closed. This issue was seen when importing Web Forms, Documents, 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.

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[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.

Edit Participant Details

Workflow Actions

Action 1

Type: Federal Consumer Disclosure e-Sign Act Agreement

[Add Workflow Action](#)

☐ Show Advanced

Workflow Action that would be cancelled incorrectly.

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: Participants

MyCompany PO

TRANSACTION: Jane Doe

Participant ID: 1000559619

Transaction ID:

Status / ID: Pending / 2

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

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

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

[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.

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Edit Participant Details

Workflow Actions

Action 1 ⬆️ ⬆️ Delete

Type: Define Another Participant

Participant to Define: Signer 2

☒ Full Name ^ options

Custom Field Label:

☒ Required
☐ Prepopulate
☐ Read-Only

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

☐ 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.

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Edit Workflow Details

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 ×

Add Placeholder Value

Add Final Notification

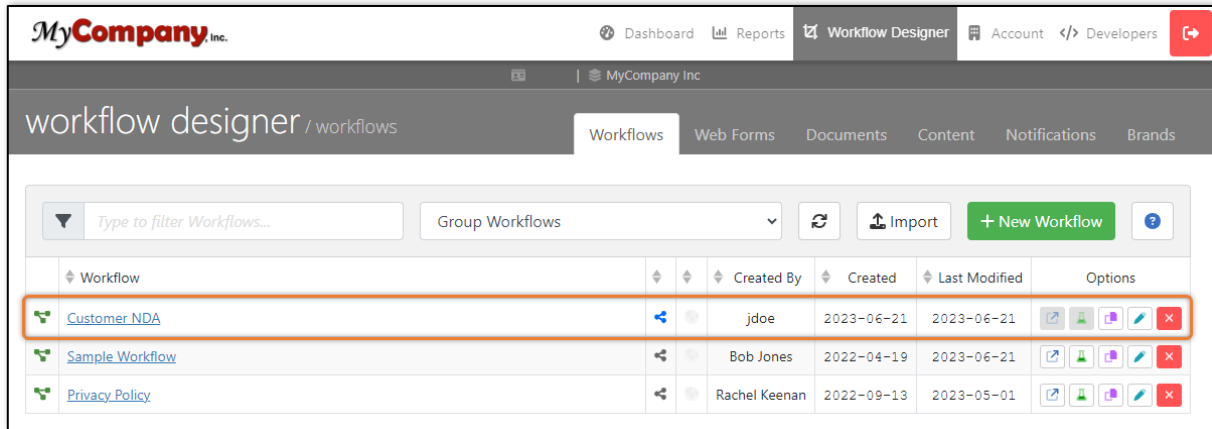
Save as Preset Cancel Update Workflow

[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.

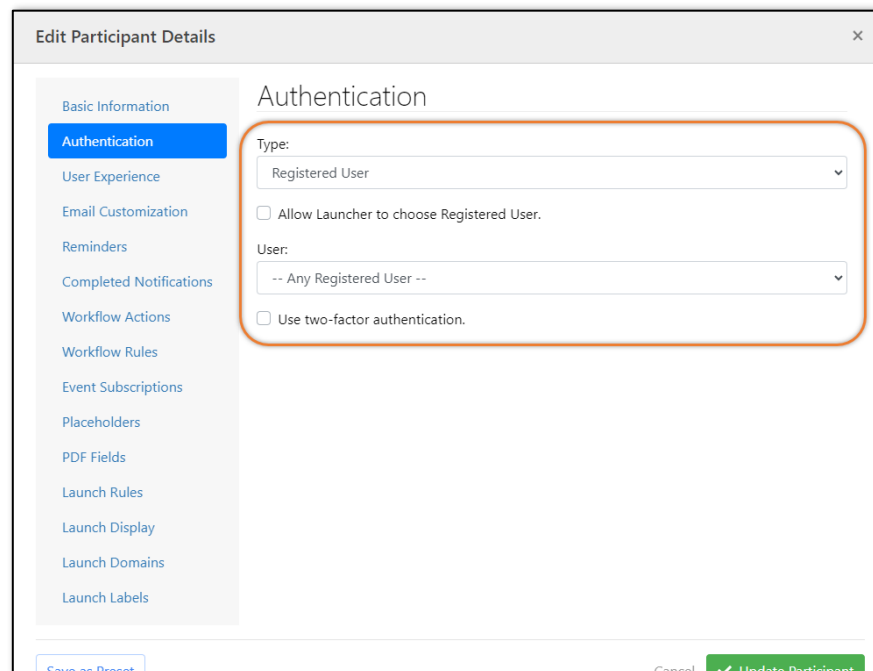
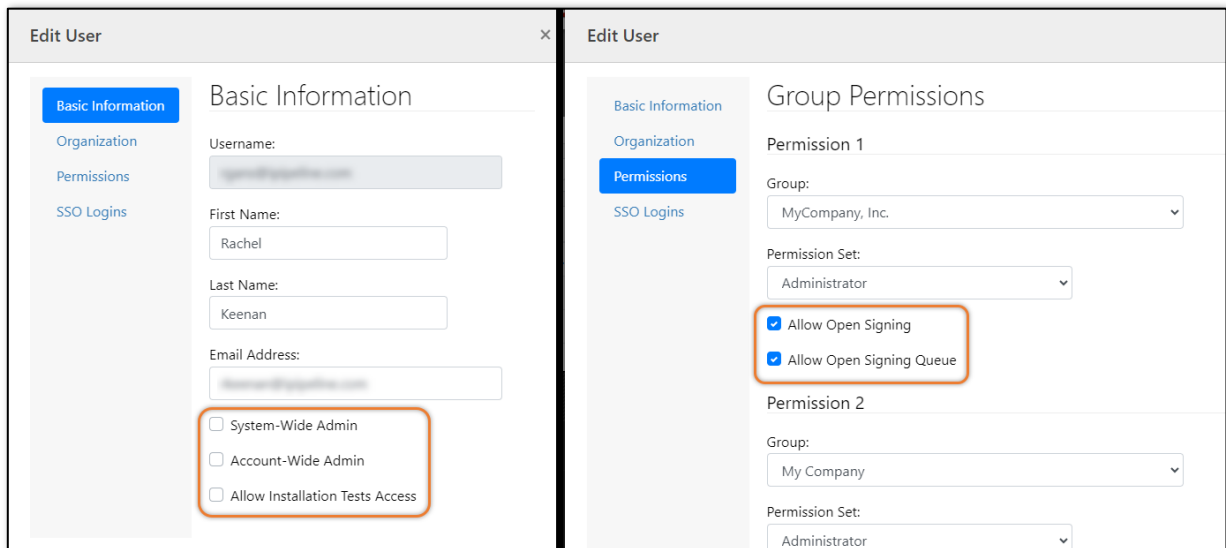
Workflow	Created	Last Modified	Options
Sample Workflow	2022-04-19	2023-06-21	Copy Share Edit Delete
Company1 SOW	2022-06-09	2022-06-09	Copy Share Edit Delete

[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.

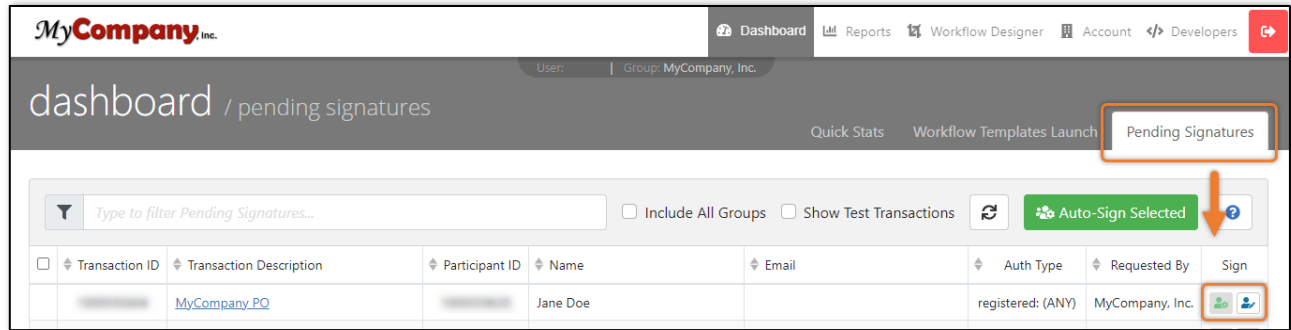
Release Notes



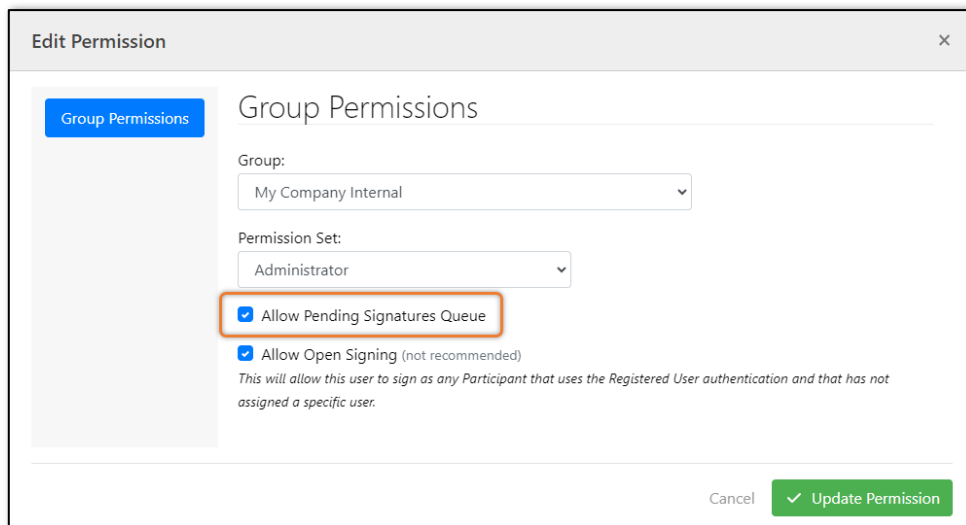
[PEP-6559] - Fixed issue where Account-wide and System-wide admins that do not have explicit open-signing permissions would be able to see and sign open-signing transactions. Please see the images below for an example transaction with open-signing and the referenced User and Workflow settings.



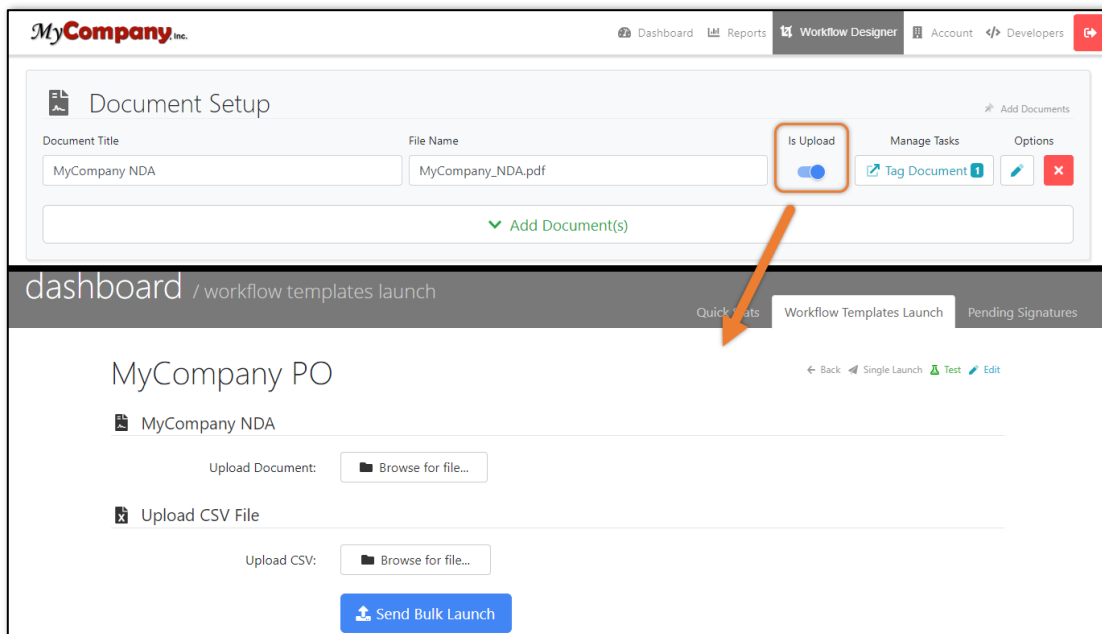
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[PEP-6558] - Fixed issue where the Allow Pending Signatures Queue setting was mislabeled and would only appear after selecting the Allow Open Signing setting. Please see the image below for more information.



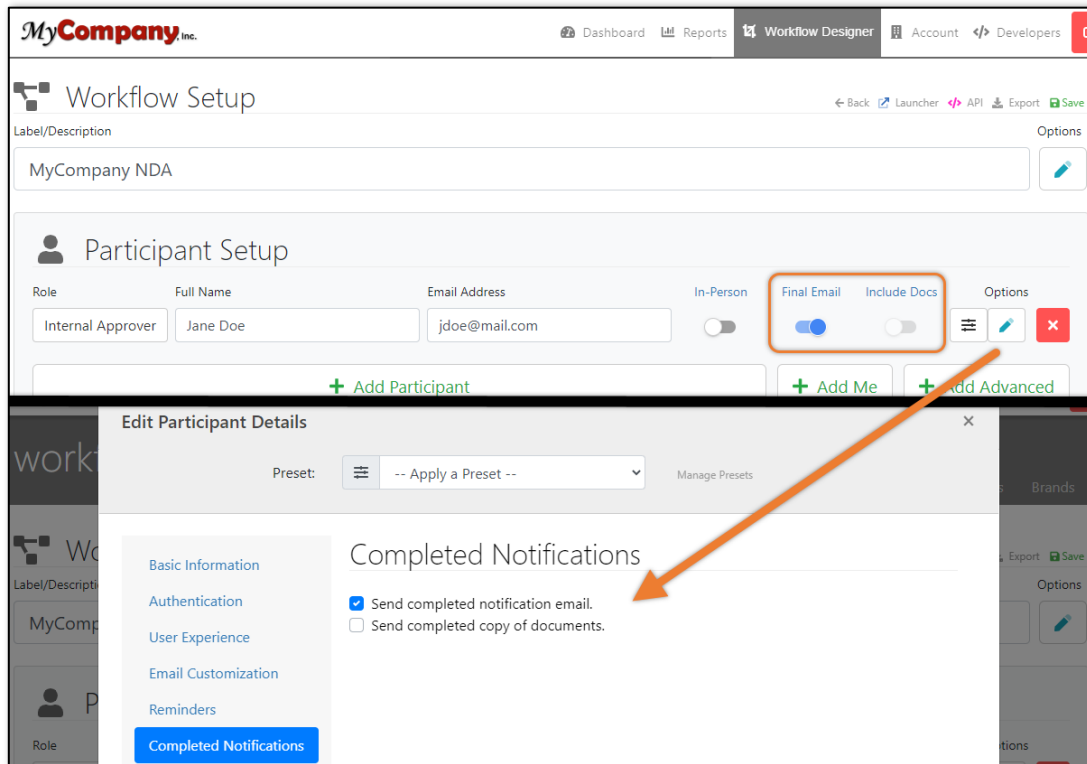
[PEP-6371] - Fixed issue where fields would not properly populate for an uploaded document when bulk launching. Please see the referenced settings in the image below.



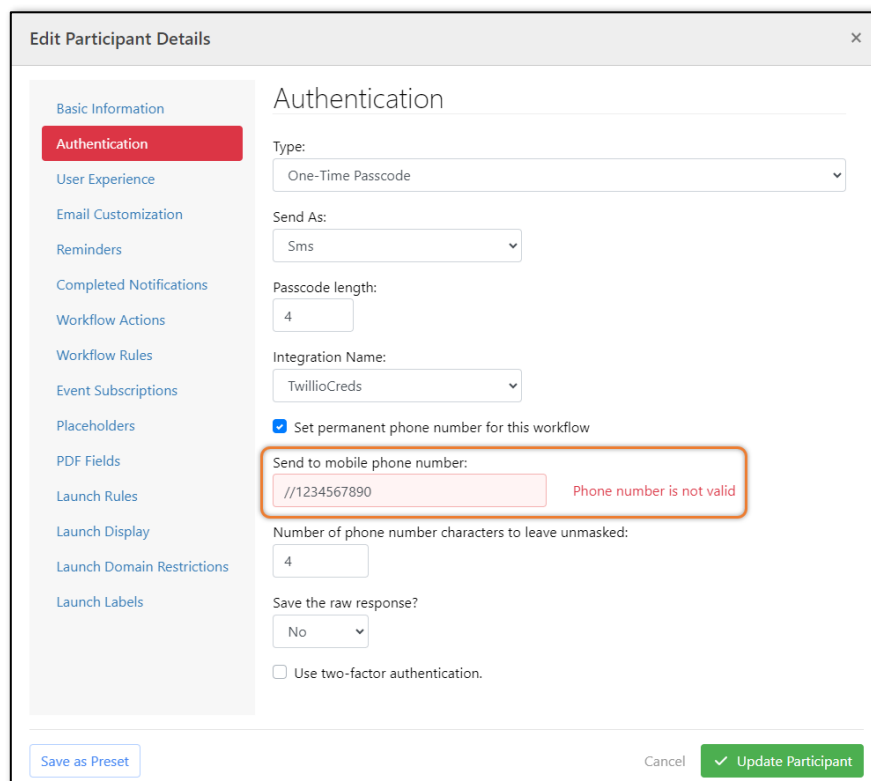
[PEP-6231] - Fixed issue where the Profile Editor would keep the Updated Password checkbox enabled and would reopen on the Password tab after a user clicks on the cancel button. The Profile Editor will open on the Basic Information tab every time it is opened.

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[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.



[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.



Release Notes

v5.16.8 Release

Release Date: 7/12/2023

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.

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

Authentication

Type: Knowledge-Based (KBA)

Config Settings:

☐ Use two-factor authentication.

Save as Preset Cancel Update Participant

MyCompany Inc.

account / integrations

Type to filter Integrations

ID Integration Name

Integration

☐ Account-Wide (shared to all other Groups and Sub-Groups if applicable)

Integration Name: Required

Provider:

Please select one

Please select one

SSO Authentication

Windows Active Directory Federated Services (ADFS)

Microsoft Azure AD

Okta

Knowledge-Based Authentication

Experian PreciseID

Lexis Nexis

Cancel AddIntegration

Permission Sets Integrations

+ Add Integration

Active Type Options

Windows ADFS

Microsoft Azure AD

Experian Precise ID

Lexis Nexis

Okta

SendGrid

Twilio SMS

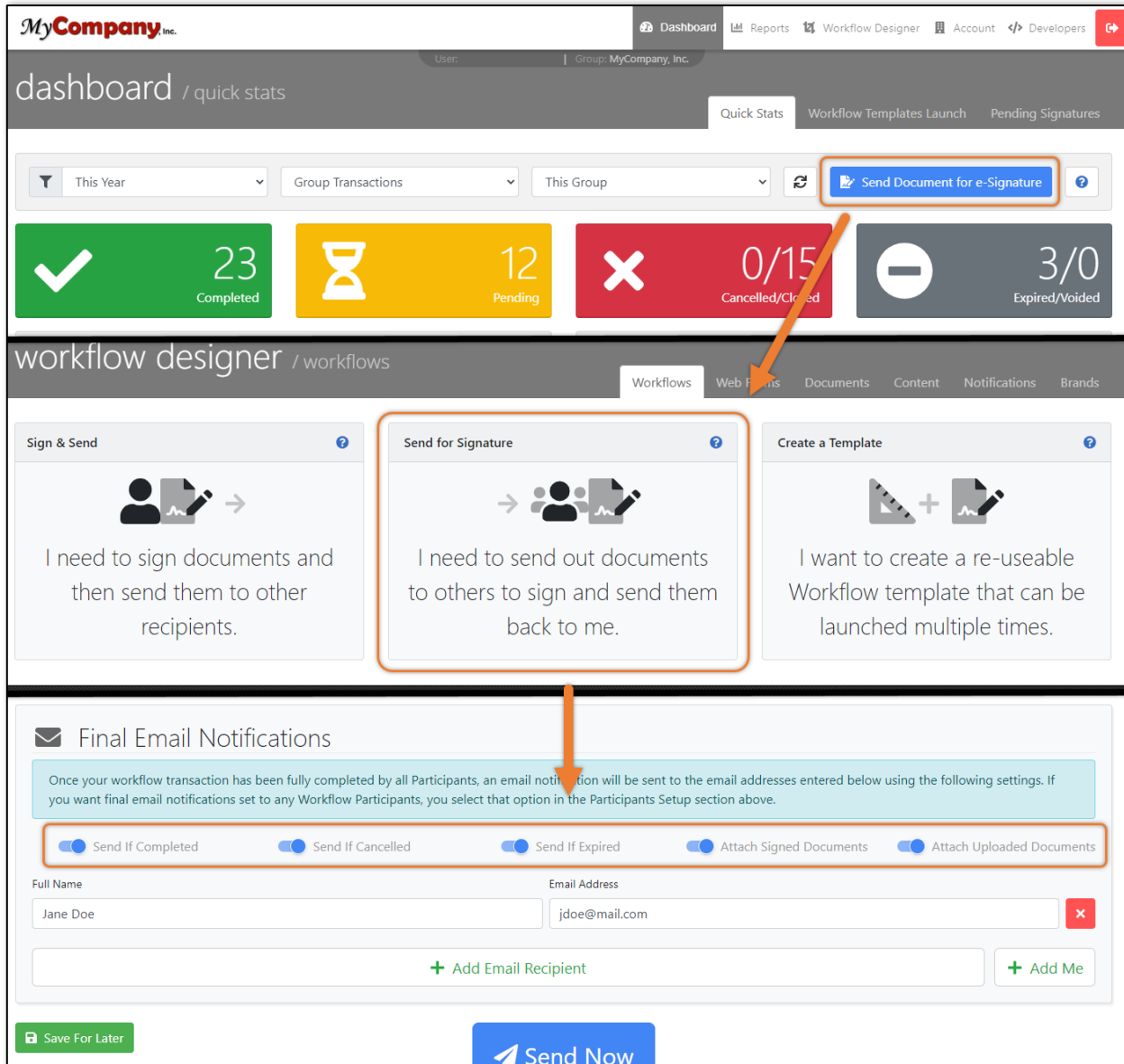
v5.16.7 Release

Release Date: 6/1/2023

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.

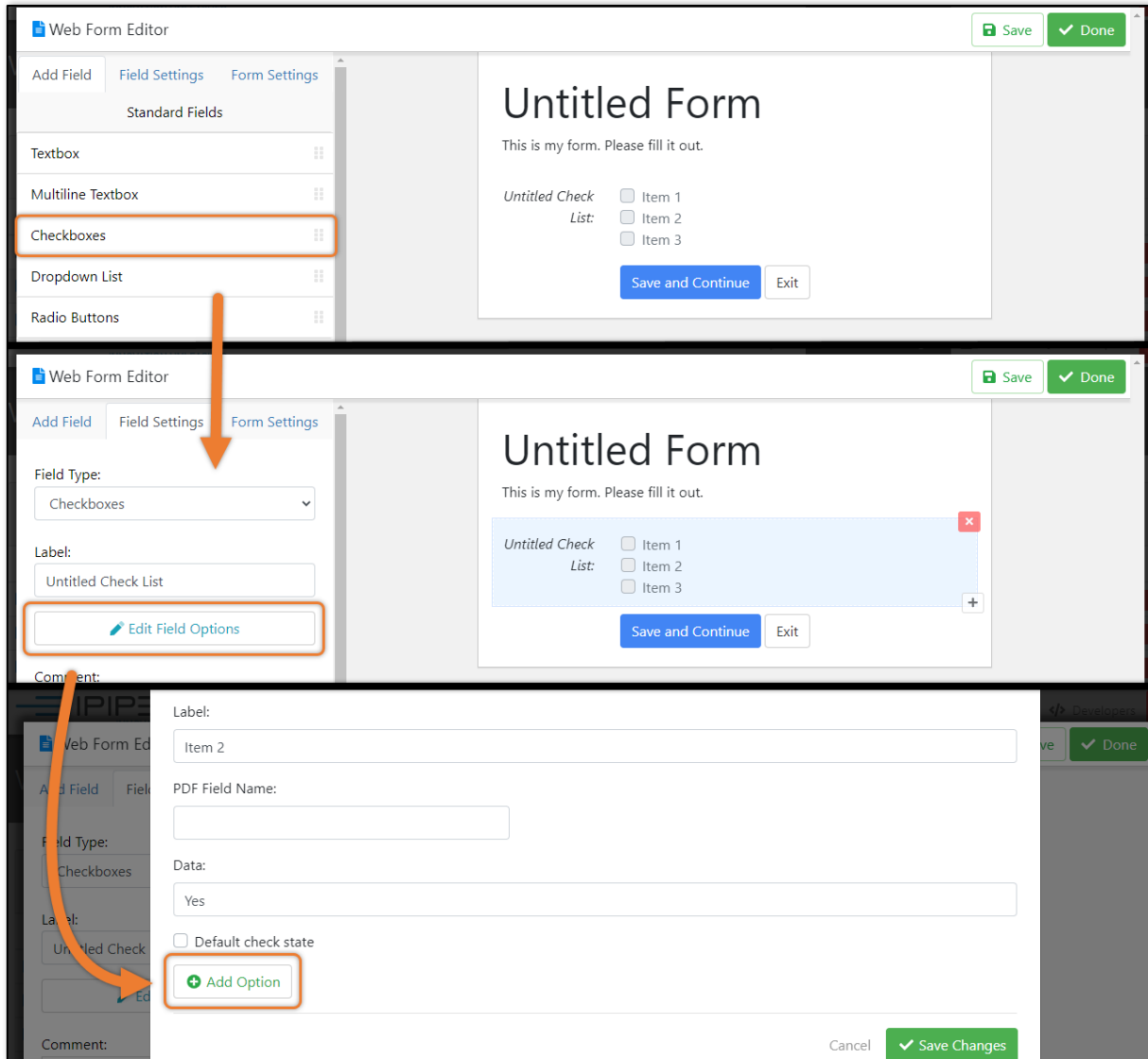
v5.16.6 Release

Release Date: 5/18/2023

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 ☐ New Patient Form 1

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

[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

Release Date: 5/4/2023

Bug Fixes

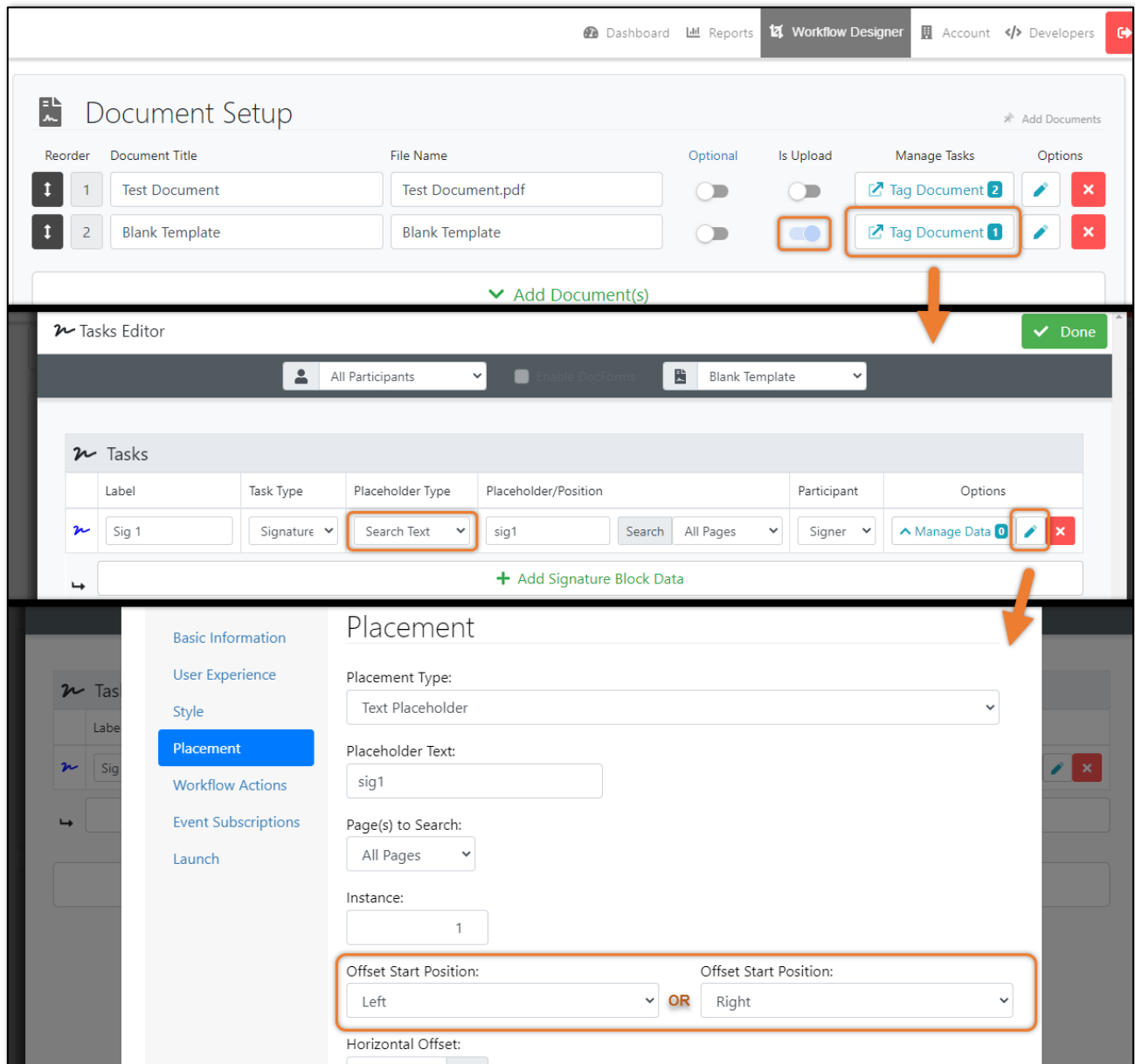
[PEP-6637] - Fixed issue where transactions could not be created when encrypted PDF/A documents were uploaded or used.

v5.16.4.1 Release

Release Date: 4/24/2023

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

Release Date: 4/20/2023

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-6589] - Fixed issue where that can show up in Event Viewer under certain scenarios:

Release Notes

Document integrity check failed for DocumentID = ##### on SignatureID = ##### Document cannot be processed further - fatal error (SignDoc2-primary).

[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.

The screenshot displays the 'MyCompany Inc.' Workflow Designer interface. The top navigation bar includes links for Dashboard, Reports, Workflow Designer (active), Account, and Developers. The main content area is divided into two sections: 'Document Setup' and 'Tasks Editor'.

Document Setup: This section contains a table with two rows. The first row is for 'MyCompany NDA' and the second for 'Blank Template'. Each row has columns for 'Reorder', 'Document Title', 'File Name', 'Optional', 'Is Upload', 'Manage Tasks', and 'Options'. The 'Manage Tasks' column for the 'Blank Template' row shows a 'Tag Document' button with a red 'X' icon, which is highlighted by an orange box and an arrow pointing to the 'Tasks Editor'.

Tasks Editor: This section shows a table of tasks. The first row is for 'Sig 1' with a 'Signature' task type and a 'Search Text' placeholder type. The 'Search Text' placeholder type is highlighted by an orange box. Below the table, there are buttons for '+ Add Signature Block Data' and '+ Add Task'.

[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.

The screenshot shows the 'Edit Form Field Details' dialog box. The 'Style' tab is selected, and the 'Read-Only' checkbox is checked and highlighted by an orange box. An arrow points from this checkbox to the 'Field Options' panel on the right.

Field Options: This panel shows the 'Field Name' as 'Employer Name Address Phone', which is highlighted by an orange box. Other options include 'Field Type' (Textbox), 'Participant' (Any Participant), 'Initial Value' (MyCompany Inc, 1234 Company Street, £), and 'Required' (checkbox).

Release Notes

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

1 **TEST DOCUMENT - TEST DOCUMENT - TEST DOCUMENT**

New Patient Form

Date: Full Name:

Date of Birth: Gender:

Address: City: State: Zip:

Employer Name, Address, & Phone:

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

MyCompany Inc, 1234 Company Street, 890-123-45

[PEP-6567] - Removed X-Frame-Options from Sign App as it is not required.

[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.

Tasks Editor Done

Signer 1 ☐ Enable DocForms MyCompany NDA - Copy

Task Placement

- Signature
- Initials
- Approval
- Delivery
- Carbon Copy

DocForms Field Placement

One or more Participants must be Form Fillers in order to add/edit Form Fields in your document.

Enable DocForms

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 diam. Praesent imperdiet leo quis hendrerit consectetur. Phasellus rhoncus felis at risus dictum blandit. Quisque libero velit, scelerisque nec augue a, convallis consequat metus. Duis feugiat sed risus imperdiet venenatis. Praesent et vestibulum leo. Nulla rhoncus tristique orci non vestibulum. Aenean sagittis, dolor vitae maximus pharetra, ligula purus molestie justo, a maximus sem dolor vitae nulla. Etiam scelerisque enim id ligula laoreet dictum sit amet quis ex. Sed tellus risus, consectetur at sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante rutrum ultrices. Suspendisse porta purus turris. vitae congue neque euismod a. Sed commodo odio ac felis suscipit feugiat. Suspendisse

Edit Participant Details

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:

Leave Document available 0 minutes after completed

Document Access Limit:

Allow Participant to access 0 times after completed

Save as Preset Cancel Update Participant

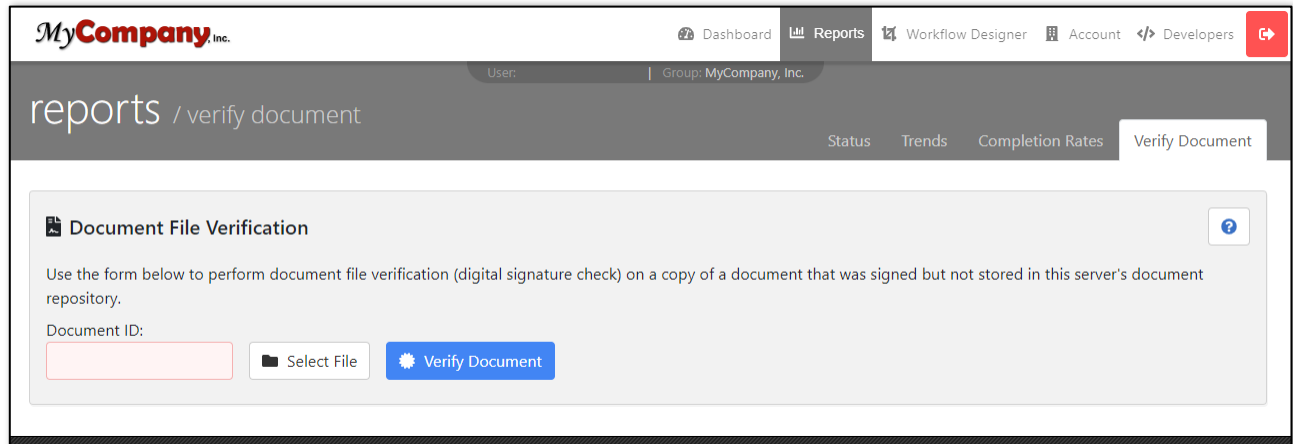
Release Notes

v5.16.3 Release

Release Date: 4/6/2023

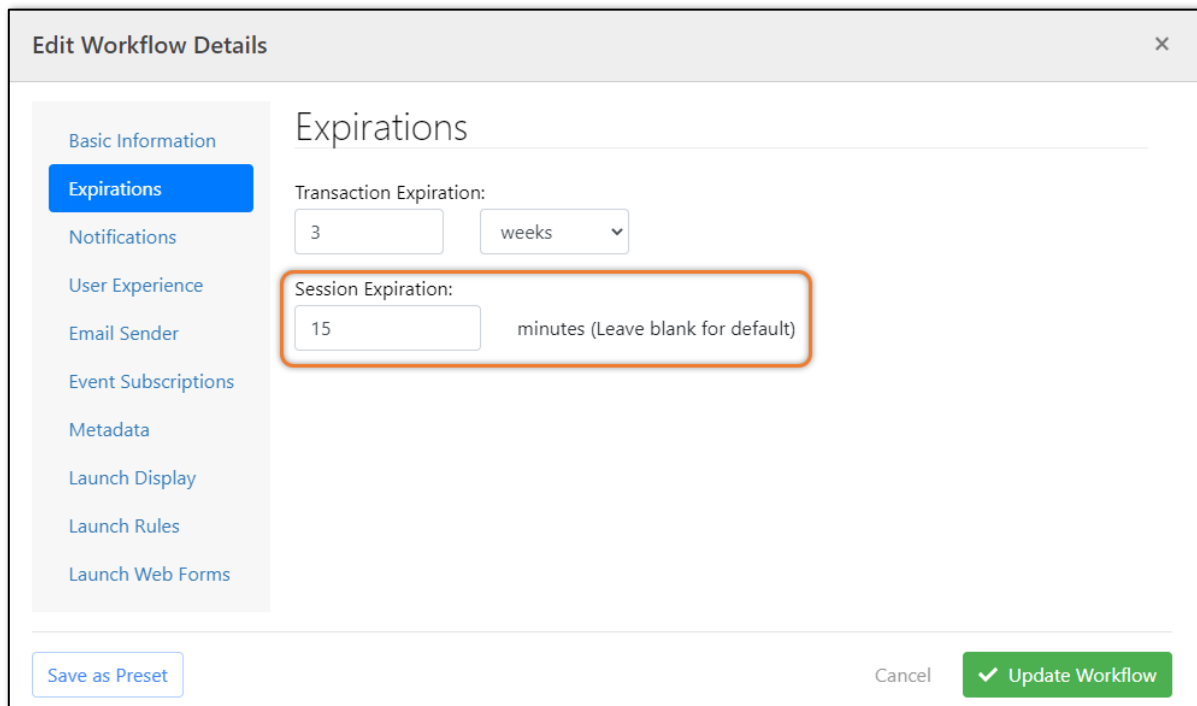
Bug Fixes

[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.



[PEP-6481] - Fixed issue where accessing license information was causing an "Index was outside the bounds of the array" error.

[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 its 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

[PEP-6056] - Fixed issue where accessing license information was causing an "An item with the same key has already been added." error.

v5.16.2.2 Release

Release Date: 4/12/2023

Bug Fixes

Note: Updates in version 5.16.2.2 are not included in version 5.16.3 but are included in version 5.16.4.

[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.

v5.16.2.1 Release

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

Release Date: 3/29/2023

Bug Fixes

[PEP-6424] - Fixed issue where when UseOldSigningUI was set to 1, you could not publicly launch workflows using ProntoNet. Please see the Signing UI location and public launch setting below.

Setting Location: ProntoConfig.ini > PRONTO_MODE

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

[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.

Add Content









×

Name: ExternalCustomers

Language: Spanish

✓ Add Content

Cancel

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

Release Notes

The screenshot shows the 'Content' management interface for 'MyCompanyInc'. The top navigation bar includes 'Workflows', 'Web Forms', 'Documents', 'Content', 'Notifications', and 'Brands'. The 'Content' tab is active, showing a list of templates. The 'Access Denied' template is selected. The 'Overwrite From Another Content Template Set' section on the left allows selecting a template set and language to overwrite the selected items.

Content > MyCompanyInc

Templates should appear

Export Edit Delete

Supported Languages + Add Language

Spanish

Overwrite From Another Content Template Set

Select the Template Set and Language you would like to use to overwrite the selected items.

Template Set: Master Set (READ-ONLY)

Language: Spanish

Overwrite Selected Items

	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-6363] - Fixed issue where server information could be identified via headers. Modified headers to remove server information.

[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 screenshot shows the 'Edit Participant Details' dialog box with the 'Authentication' tab selected. The 'Type' is set to 'Mobile'. The 'Integration Name' is set to 'Mobile'. The 'Set permanent phone number for this workflow' checkbox is unchecked. The 'Number of phone number characters to leave unmasked' is set to 4. The 'Save the raw response?' dropdown is set to 'No'. The 'Passcode length' is set to 4. The 'Use two-factor authentication.' checkbox is checked. The 'Second-Factor Authentication' section is visible, with 'Type' set to 'One-time PIN/Password'.

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: Mobile

☐ 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

Save as Preset

Cancel

Update Participant

Release Notes

[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.

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

PDF Fields

Launch Rules

Launch Display

Launch Domains

Launch Labels

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

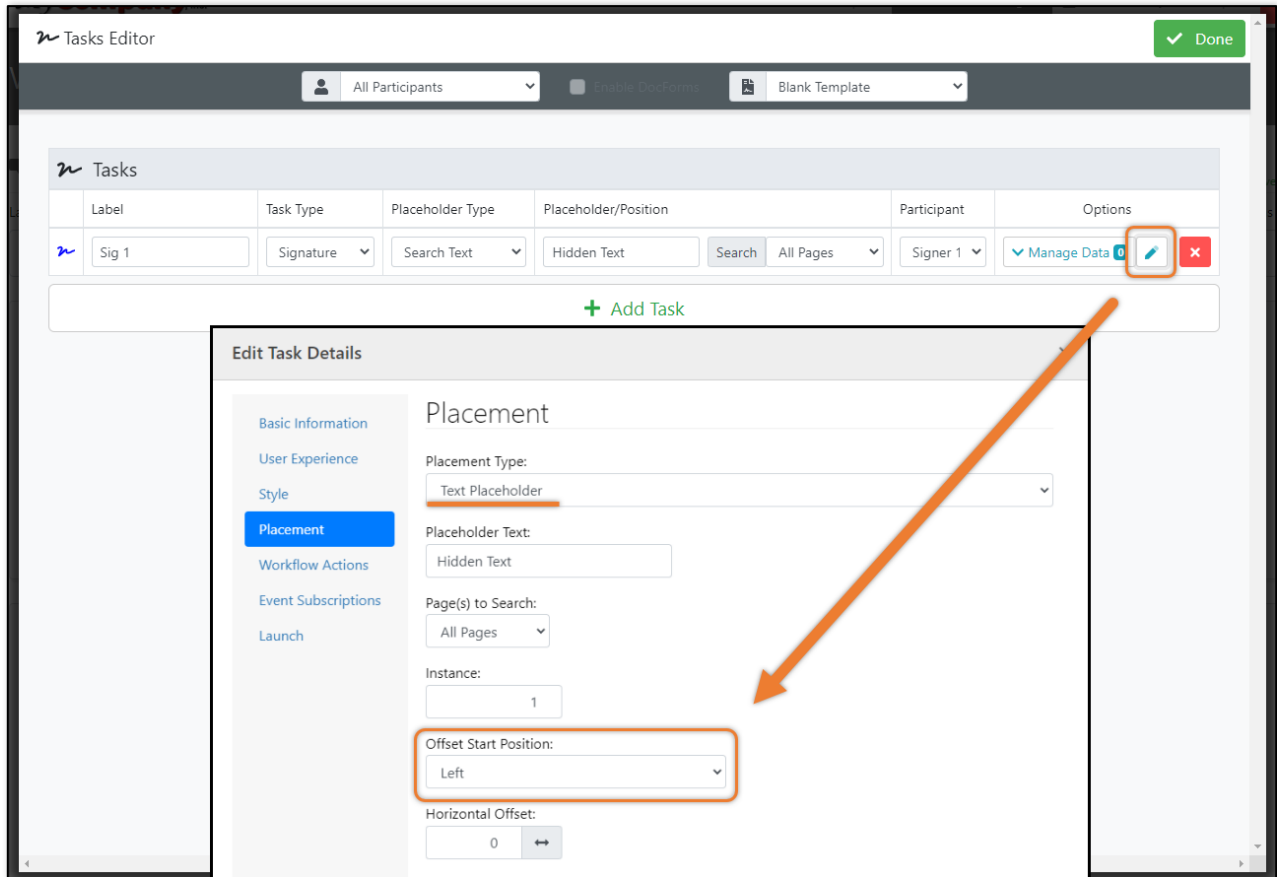
Save as Preset

Cancel

Update Workflow

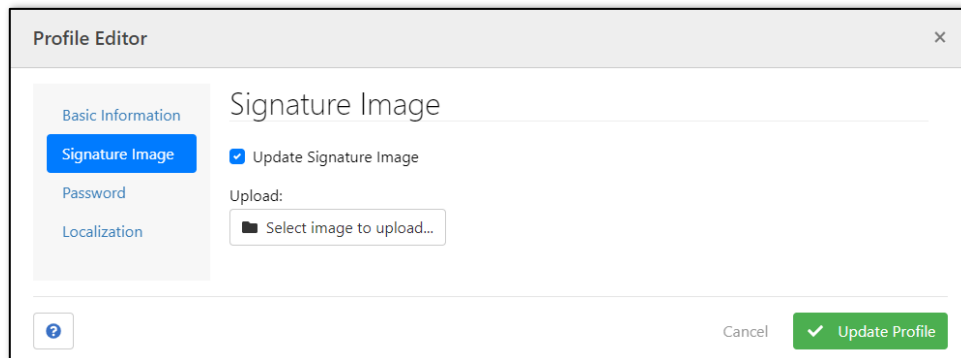
Release Notes

[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.



The screenshot shows the 'Tasks Editor' interface. At the top, there's a 'Done' button. Below it, a header bar contains 'All Participants', 'Add Task', and 'Blank Template' dropdowns. The main area displays a table of tasks. The first task is 'Sig 1' with a 'Signature' task type and 'Search Text' placeholder type. The 'Placeholder/Position' column shows 'Hidden Text'. The 'Participant' column shows 'Signer 1'. The 'Options' column has a 'Manage Data' button and a red 'X' button. Below the table is a '+ Add Task' button. A modal dialog titled 'Edit Task Details' is open, showing the 'Placement' tab. The 'Placement Type' is 'Text Placeholder'. The 'Placeholder Text' is 'Hidden Text'. The 'Page(s) to Search' is 'All Pages'. The 'Instance' is '1'. The 'Offset Start Position' dropdown is highlighted with an orange box and an arrow pointing to it. The dropdown shows 'Left' as the selected value. The 'Horizontal Offset' is '0'.

[PEP-6207] - Fixed issue where signatures using *Registered Image* Application Type would not have the Signature Chrome frame when it should. Please note the Signature Chrome setting and reference the images on a user's Signature Image (*Registered Image*), signature settings, and example signature that should have the Signature Chrome below.
Setting Location: ProntoConfig.ini > PRONTO_MODE
Example setting: UseSignatureChrome=1



The screenshot shows the 'Profile Editor' dialog box. The 'Signature Image' tab is active. The 'Update Signature Image' checkbox is checked. The 'Upload' section has a 'Select image to upload...' button. The 'Update Profile' button is highlighted.

Release Notes

Tasks Editor

Signer 1 Enable DocForms MyCompany NDA

Task Options

Task Type: Signature

Label:

Actual field name in final PDF:

Participant: Signer 1

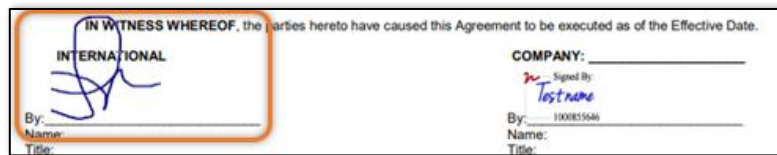
Application Type: Registered Image

Optional

Edit More Task Properties

Internal Approver Initials: _____

Signature: _____



v5.16.1.5 Release

Release Date: 3/27/2023

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.

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

2 Blank Template Blank Template

Tag Document 2

Tag Document 1

Add Document(s)

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers

Tasks Editor

All Participants Enable DocForms Blank Template

Tasks

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

Add Task

Release Notes

v5.16.1.4 Release

Release Date: 3/16/2023

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

Release Date: 3/7/2023

Bug Fixes

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

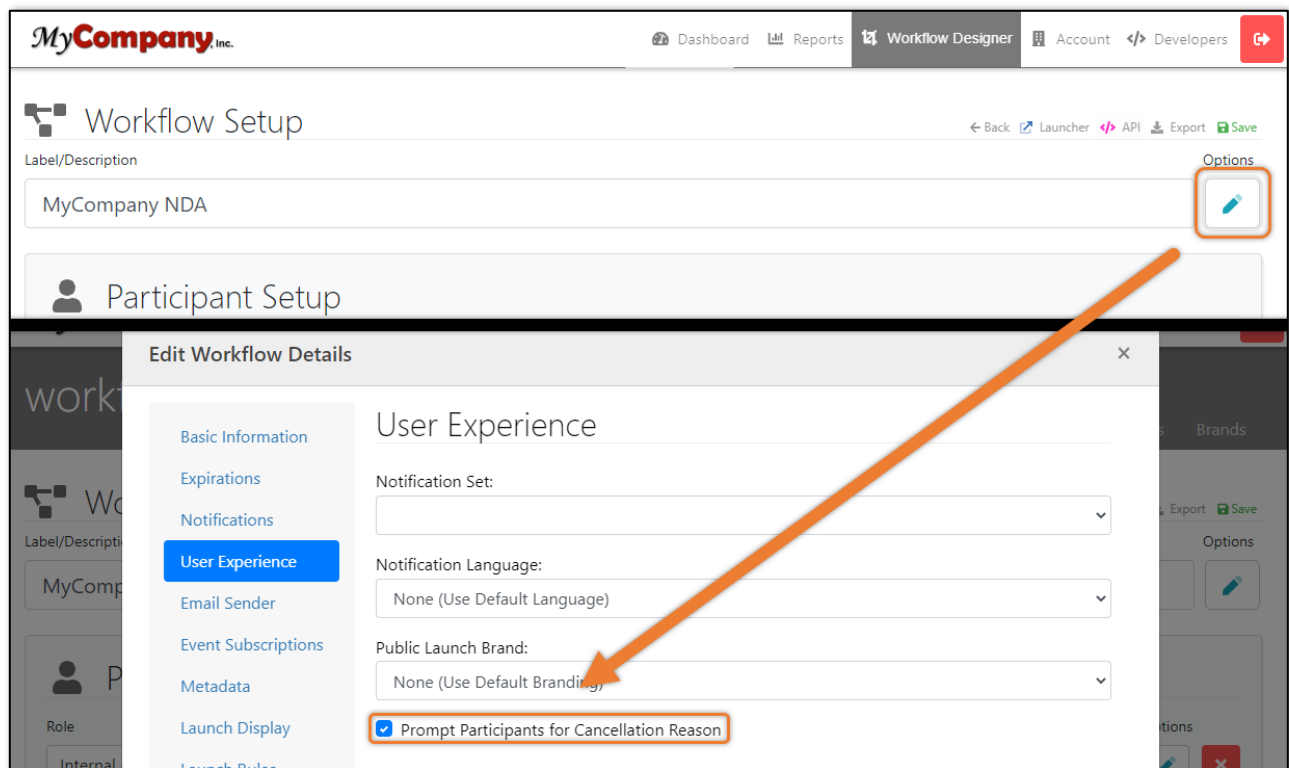
v5.16.1.2 Release

Release Date: 3/3/2023

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.



[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.

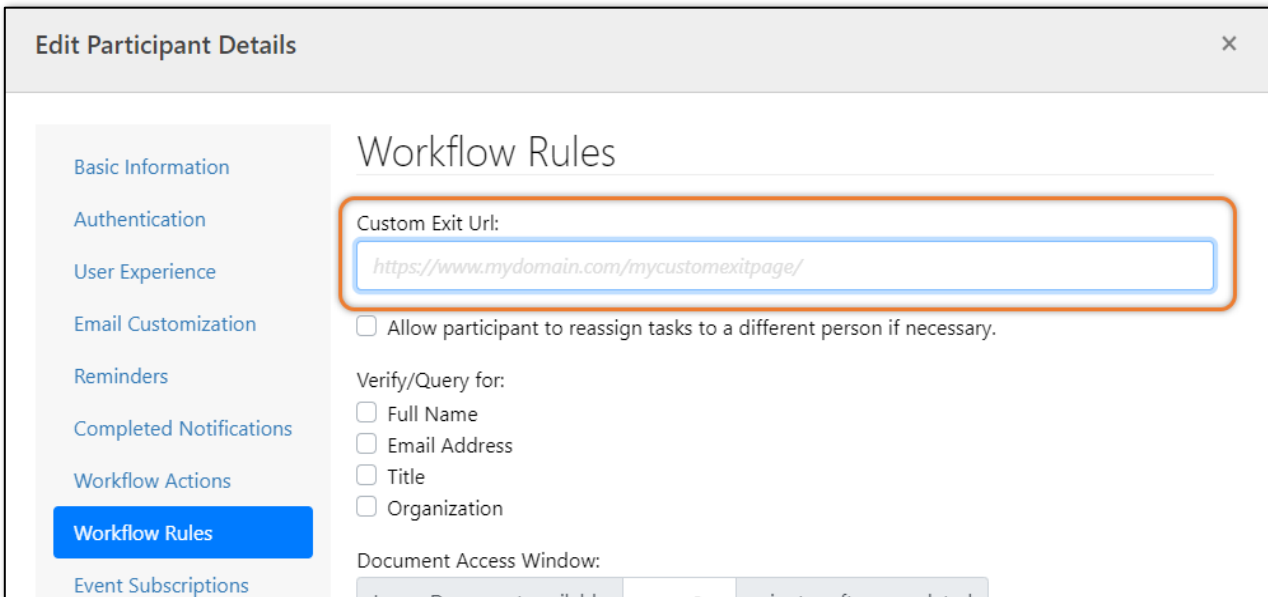
v5.16.1.1 Release

Release Date: 3/1/2023

Bug Fixes

Release Notes

[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.



Edit Participant Details

Workflow Rules

Custom Exit Url:

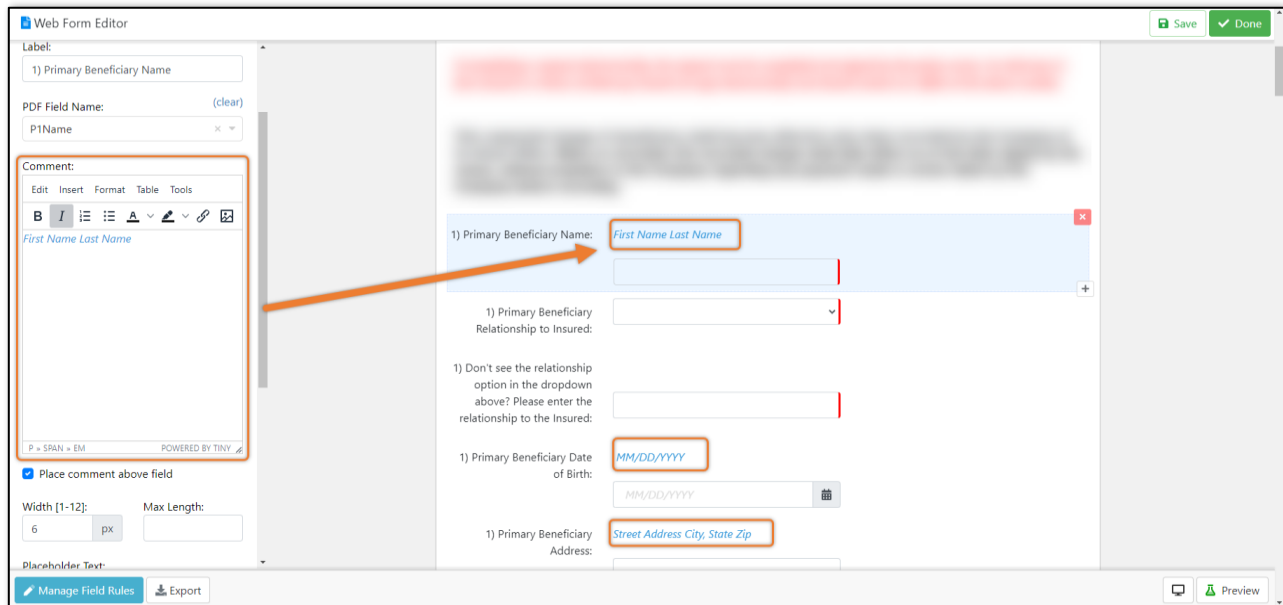
☐ Allow participant to reassign tasks to a different person if necessary.

Verify/Query for:

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

Document Access Window:

[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.



Web Form Editor

Label:
1) Primary Beneficiary Name

PDF Field Name: (clear)
P1Name

Comment:
Edit Insert Format Table Tools
B I [icon] [icon] [icon] [icon] [icon] [icon]
First Name Last Name

Place comment above field

Width [1-12]: 6 px Max Length:

Placeholder Text:

Manage Field Rules Export

Save Done

1) Primary Beneficiary Name: First Name Last Name

1) Primary Beneficiary Relationship to Insured:

1) Don't see the relationship option in the dropdown above? Please enter the relationship to the Insured:

1) Primary Beneficiary Date of Birth: MM/DD/YYYY

1) Primary Beneficiary Address: Street Address City, State Zip

Preview

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

v5.16.1 Release

Release Date: 2/28/2023

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

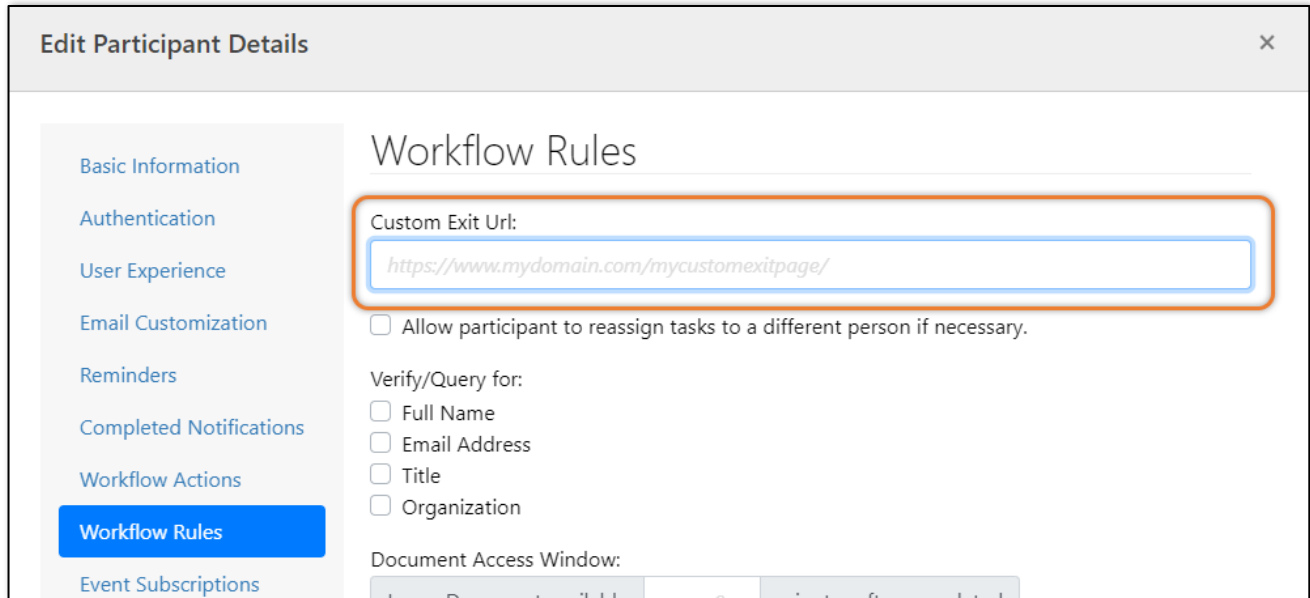
Delivery

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

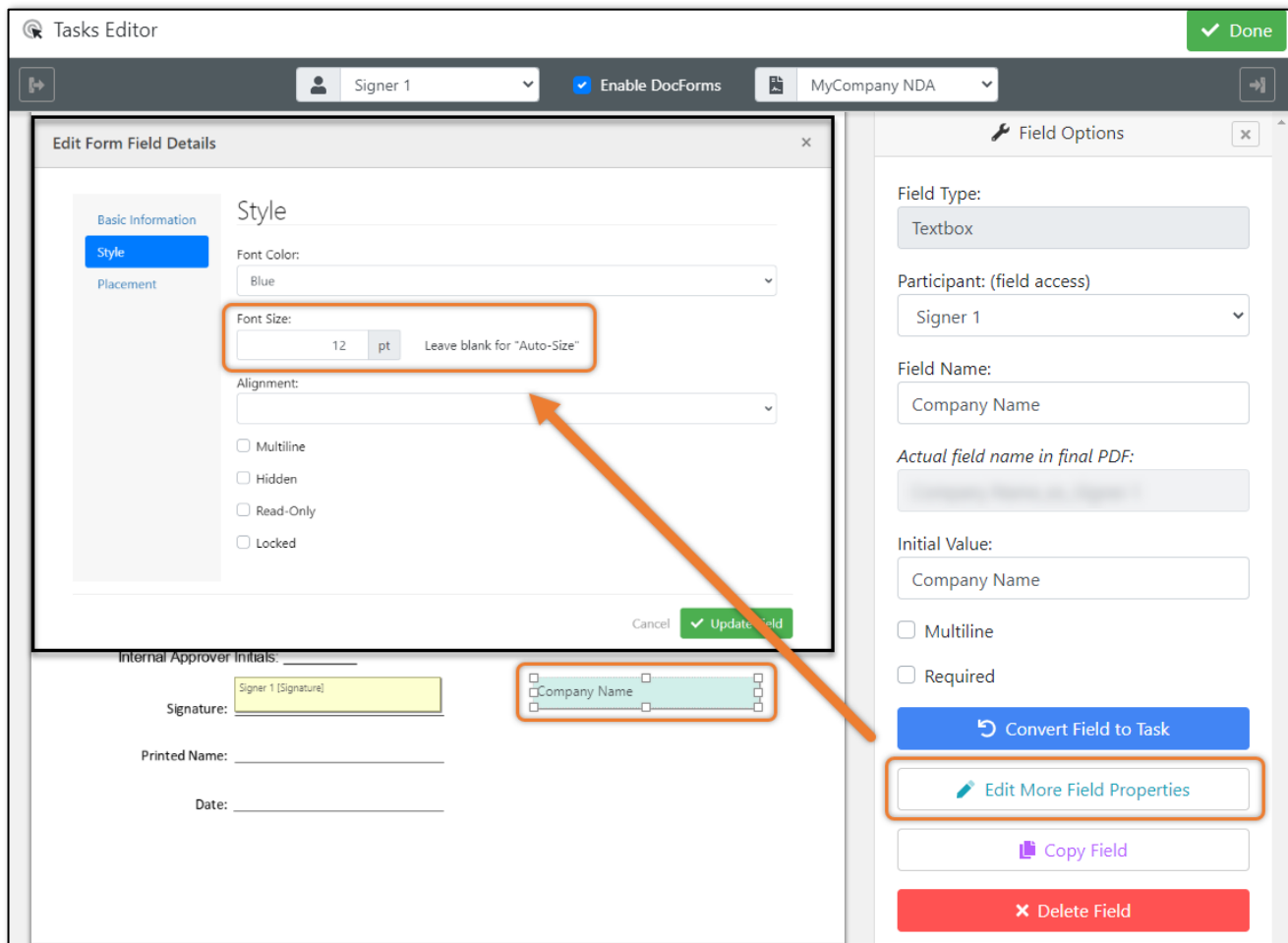
☐ Email Address

☐ 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.

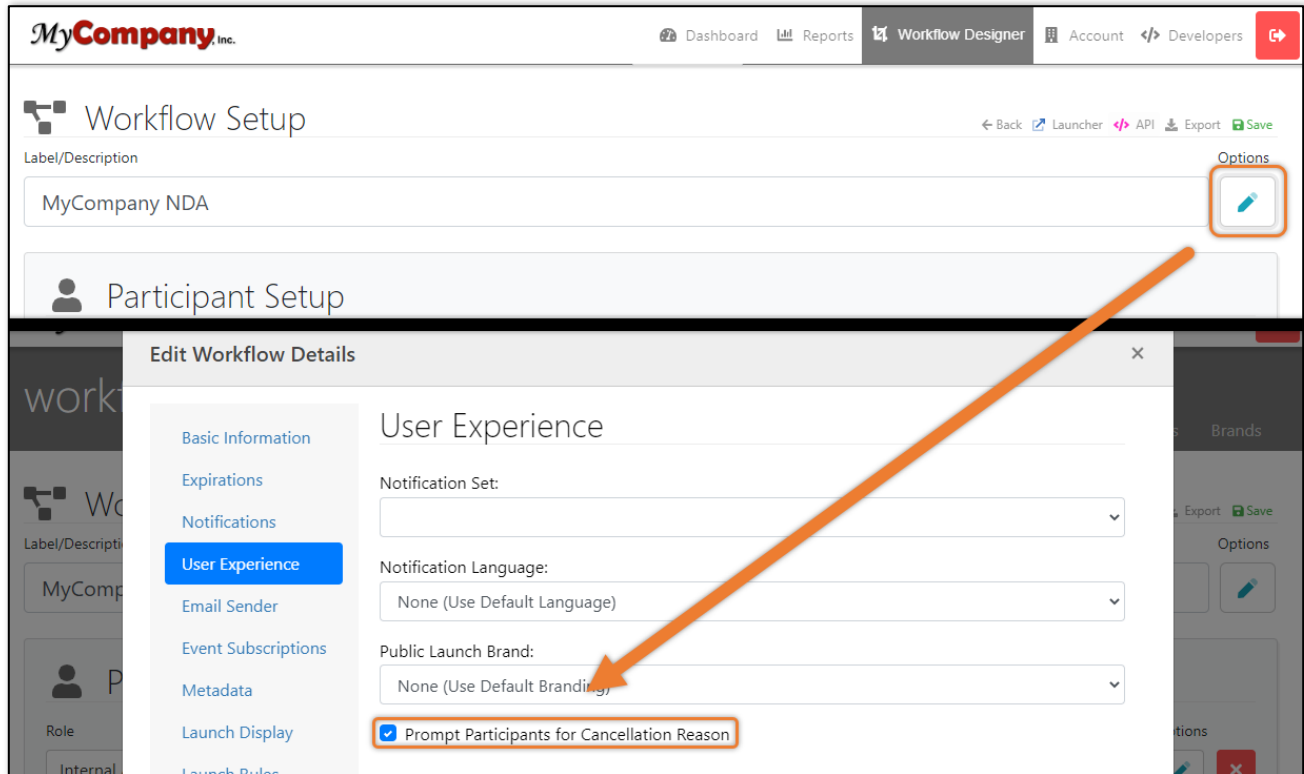
The screenshot shows the 'MyCompany' workflow designer interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header displays 'workflow designer / web forms'. Below this, there's a search bar and a table of web forms. The table has columns for 'Web Form', 'Template Name', 'Created By', 'Group', 'Created', and 'Last Modified'. One form is listed: 'My Untitled Form' with template 'EE Data Sheet.pdf' and group 'MyCompany, Inc.'. To the right of the table is a 'Test Web Form' button. 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 'Live URL for API Usage:' section shows two URLs: 'For Participant Workflow Actions:' and 'For Task Workflow Actions:', both pointing to 'https://uat.alphatrust.com/sign/participant-action/web-form?id=c84ffbee-e451-34ee-ca28-30e6338a5384' and 'https://uat.alphatrust.com/sign/task-action/web-form?id=c84ffbee-e451-34ee-ca28-30e6338a5384' respectively. An orange arrow points to the 'Test Web Form' button and the API URL section. At the bottom, the form is titled 'Untitled Form' with the instruction '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.

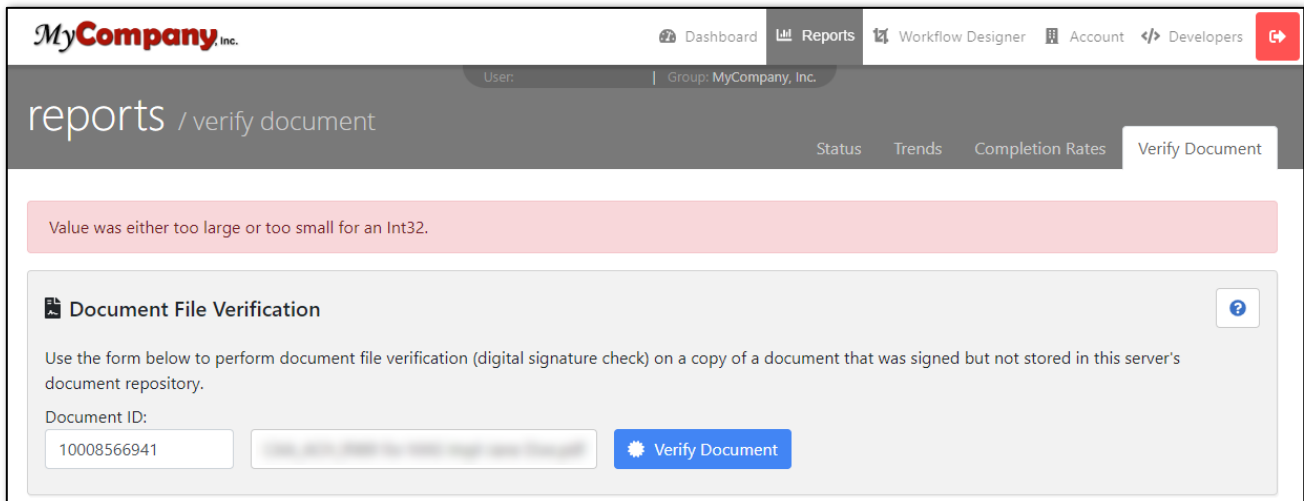
The screenshot shows the 'MyCompany' Document Setup and Tasks Editor interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header displays 'Document Setup'. Below this, there's a form for 'Document Title' and 'File Name'. The 'Document Title' is 'MyCompany NDA' and the 'File Name' is 'MyCompany_NDA.pdf'. To the right of the form is a 'Manage Tasks' button. Below the form, there's a 'Tasks Editor' section. The 'Tasks Editor' has a 'Task Options' panel on the right. The 'Task Options' panel includes fields for 'Task Type:', 'Label:', 'Actual field name in final PDF:', 'Participant:', and 'Application Type:'. The 'Task Type' is 'Initials', the 'Label' is empty, the 'Actual field name in final PDF' is empty, the 'Participant' is 'Jane Doe', and the 'Application Type' is 'Font-Stamped (Default)'. The 'Optional' checkbox is checked. An orange arrow points 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

MyCompany, Inc.

v5.16.0.0

[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.

Text Field Properties

General Appearance Position Options Actions Format Validate Calculate

Name: TestField2

Tooltip:

Common Properties

Form Field: Visible

Orientation: 0 degrees

☒ Read Only

☐ Required

☐ Locked

Close

and then click the "Save & Continue" button.

Save & Continue →

Product may not be shared or used concurrently by other end users.

2. DESCRIPTION OF OTHER RIGHTS AND LIMITATIONS

a. Limitations on Reverse Engineering, Decompilation, and Disassembly. You may not reverse engineer, decompile, or disassemble the Product, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation.

b. Rental. You may not rent, lease or lend the Product.

c. Trademarks. This EULA does not grant you any rights in connection with any trademarks or service marks of Megasoft.

d. Termination. Without prejudice to any other rights, Megasoft may terminate this EULA if you fail to comply with the terms and conditions of this EULA. In such event, you must destroy all copies of the Product and all of its component parts.

____ INITIALS

TEST2:

v5.16.0.2 Release

Release Date: 2/25/2023

Bug Fixes

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

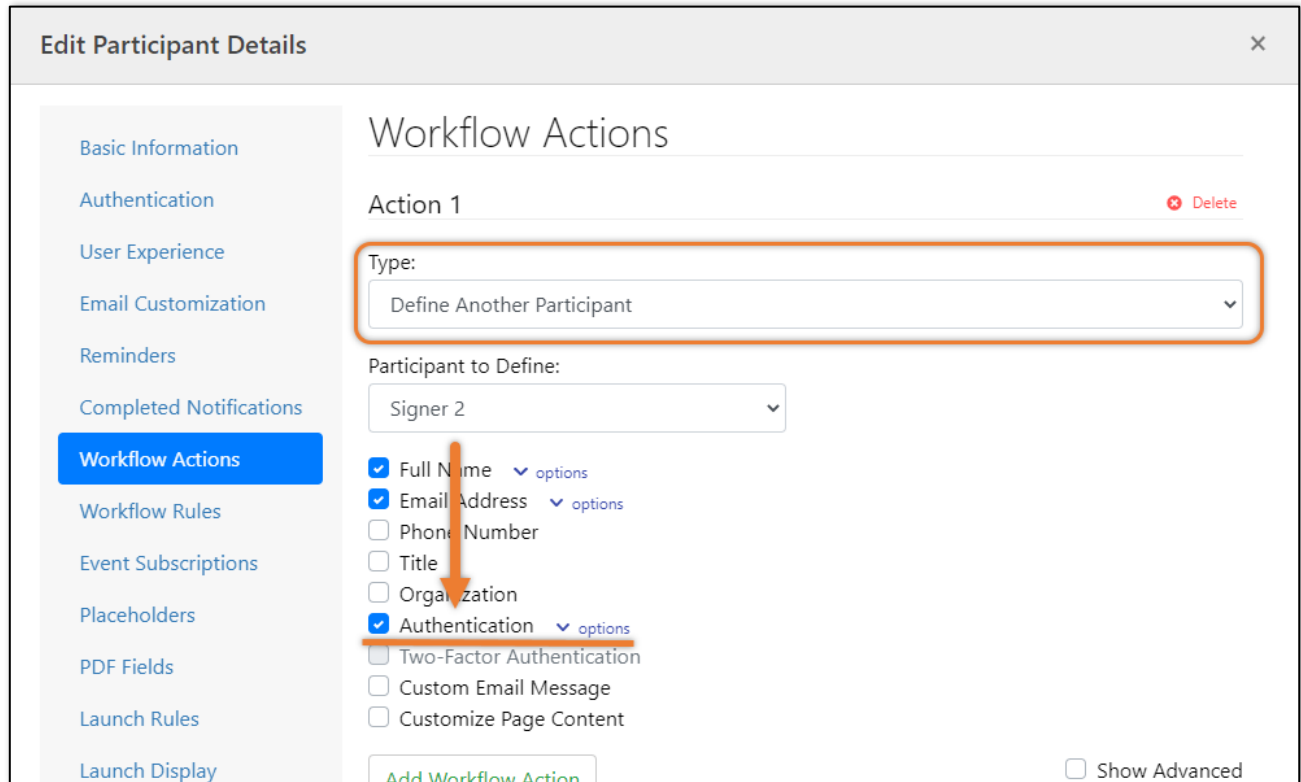
Release Notes

v5.16.0.1 Release

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

Release Date: 2/9/2023

Important Notes:

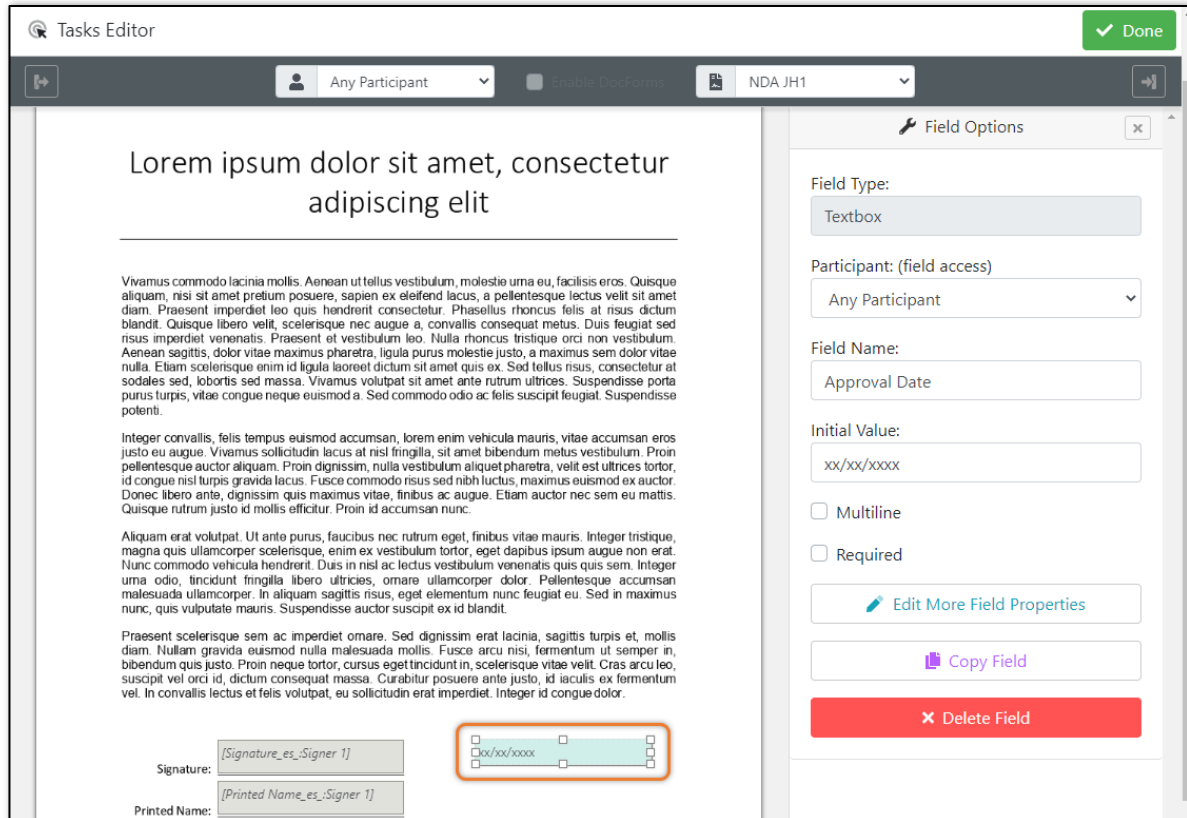
The following items are considered breaking changes.

- [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.
- [PEP-4090] - /ProntoNet/HealthCheck.aspx and /ProntoNet/ServiceHealthCheck.aspx will be removed in 2023. If your team utilizes these health checks, you will need to switch them to the new HealthCheck and ServiceHealthCheck endpoints. More information can be found in the developers guide: <https://developers.alphatrust.com/getting-started/installation/health-status-monitoring.html>.

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 Document

NDA JH1

Done

Field Options

Field Type: Textbox

Participant: (field access) Any Participant

Field Name: Approval Date

Initial Value: xx/xx/xxxx

☐ Multiline

☐ Required

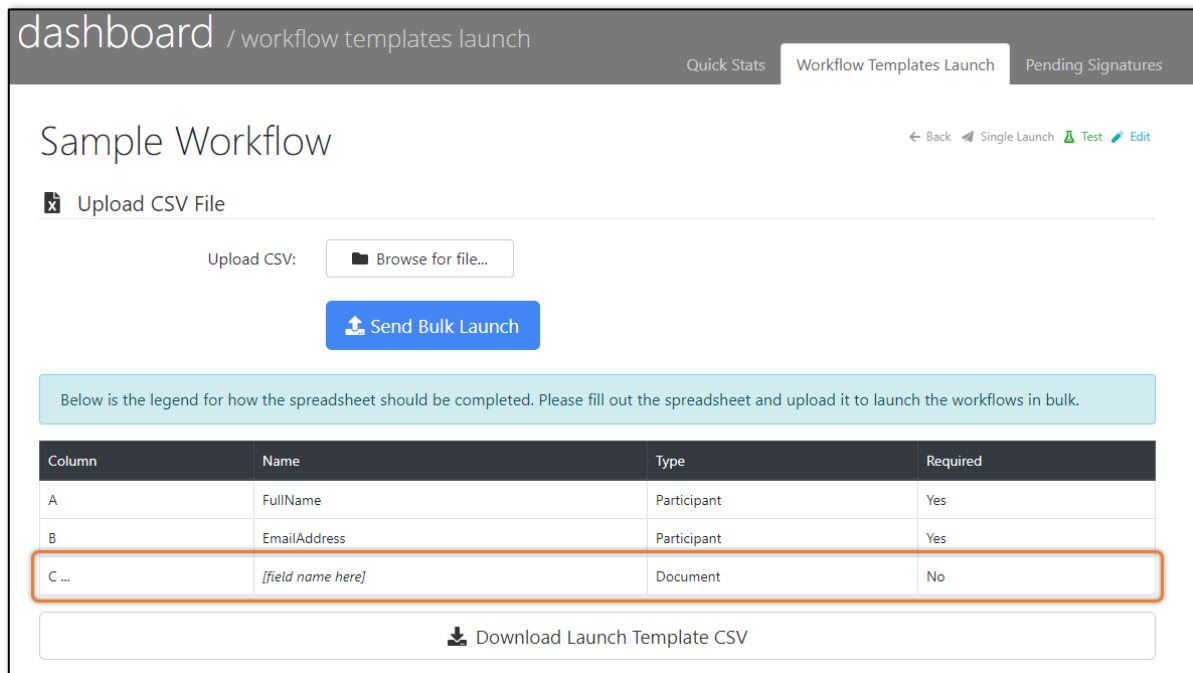
[Edit More Field Properties](#)

[Copy Field](#)

[Delete Field](#)

Signature: [Signature_es_Signer 1]

Printed Name: [Printed Name_es_Signer 1]



dashboard / workflow templates launch

Quick Stats Workflow Templates Launch Pending Signatures

Sample Workflow

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 ...	[field name here]	Document	No

[Download Launch Template CSV](#)

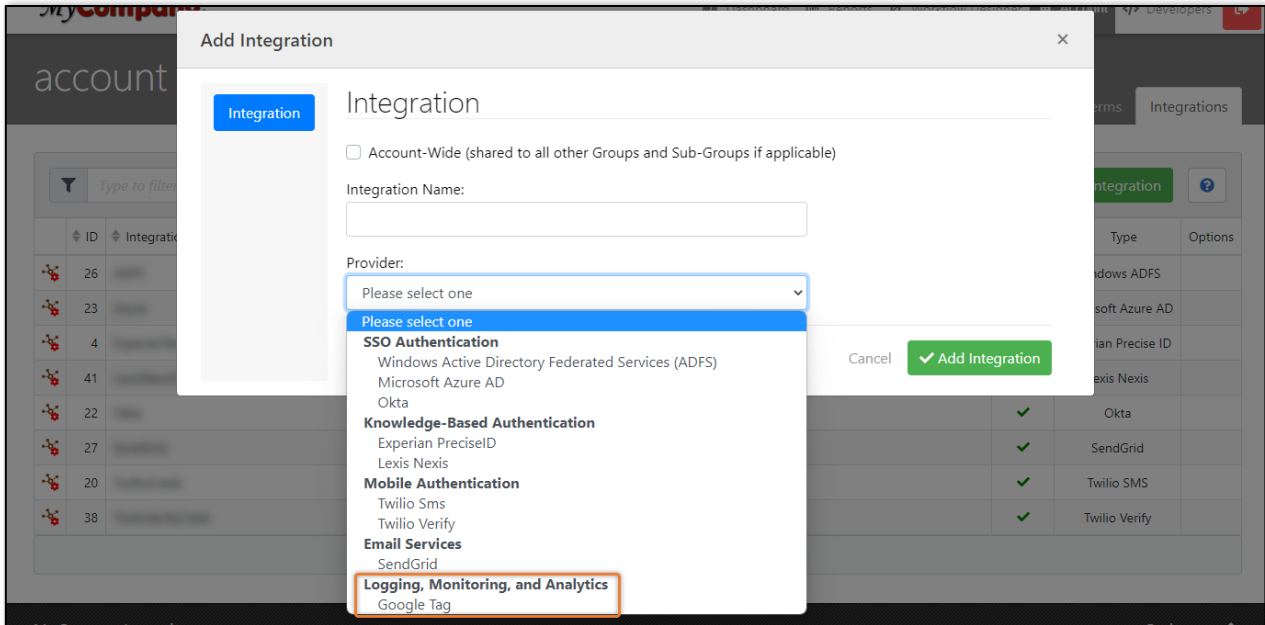
[PEP-5497] - Switched all new transactions over to use the new Signing UI. The new Signing UI will automatically be used. To force the usage of the old signing UI, please reference the settings below. Note: the old signing UI will be removed in version 5.17.0.

Location of change: ProntoConfig.ini > PRONTO_MODE

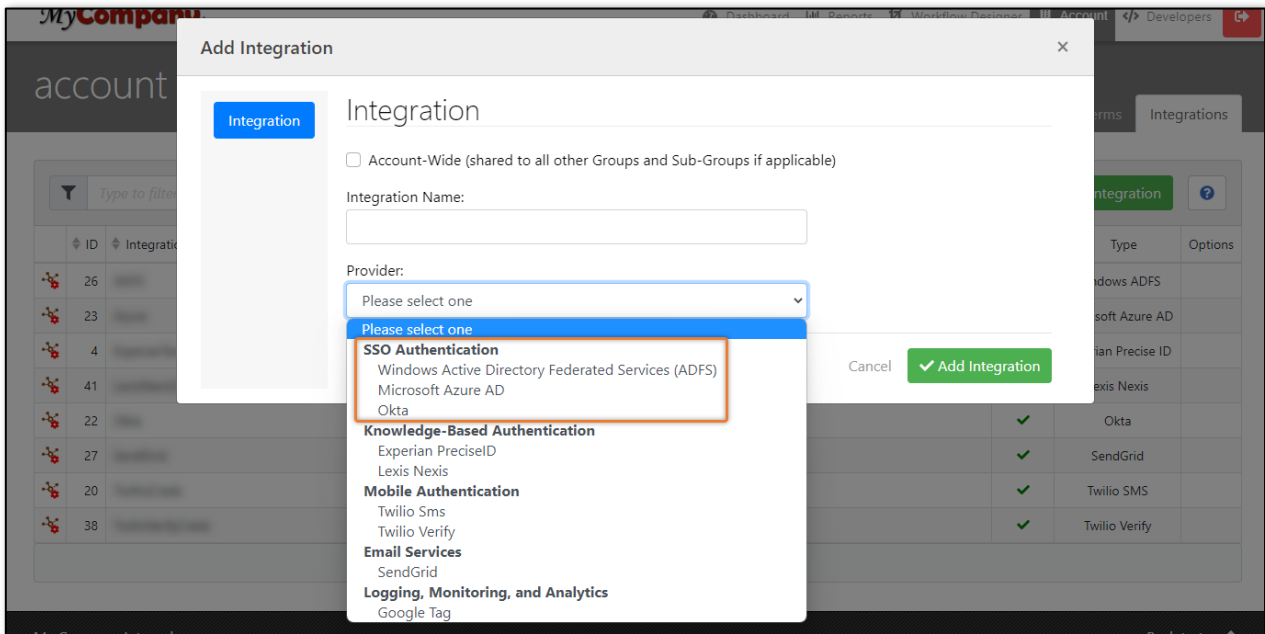
Example setting: UseOldSigningUI=1

[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-4090] - Added HealthCheck and ServiceHealthCheck endpoints to the new Public Signing UI. This gives administrators the ability to monitor individual service groups and receive alerts and action them independently. Please note that the /ProntoNet/HealthCheck.aspx and /ProntoNet/ServiceHealthCheck.aspx will be removed in 2023. More information can be found in the developers guide: <https://developers.alphatrust.com/getting-started/installation/health-status-monitoring.html>.

[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-5816] - Updated the documentation folder in on-prem installations. Removed documentation PDF's and changed them to links to the developers guide. Developers Guide Website: <https://developers.alphatrust.com/>.

Release Notes

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

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.

[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 various authentication options. The 'Mobile Authentication' section, which includes 'Twilio Sms' and 'Twilio Verify', is highlighted with an orange border. The 'Add Integration' button is 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

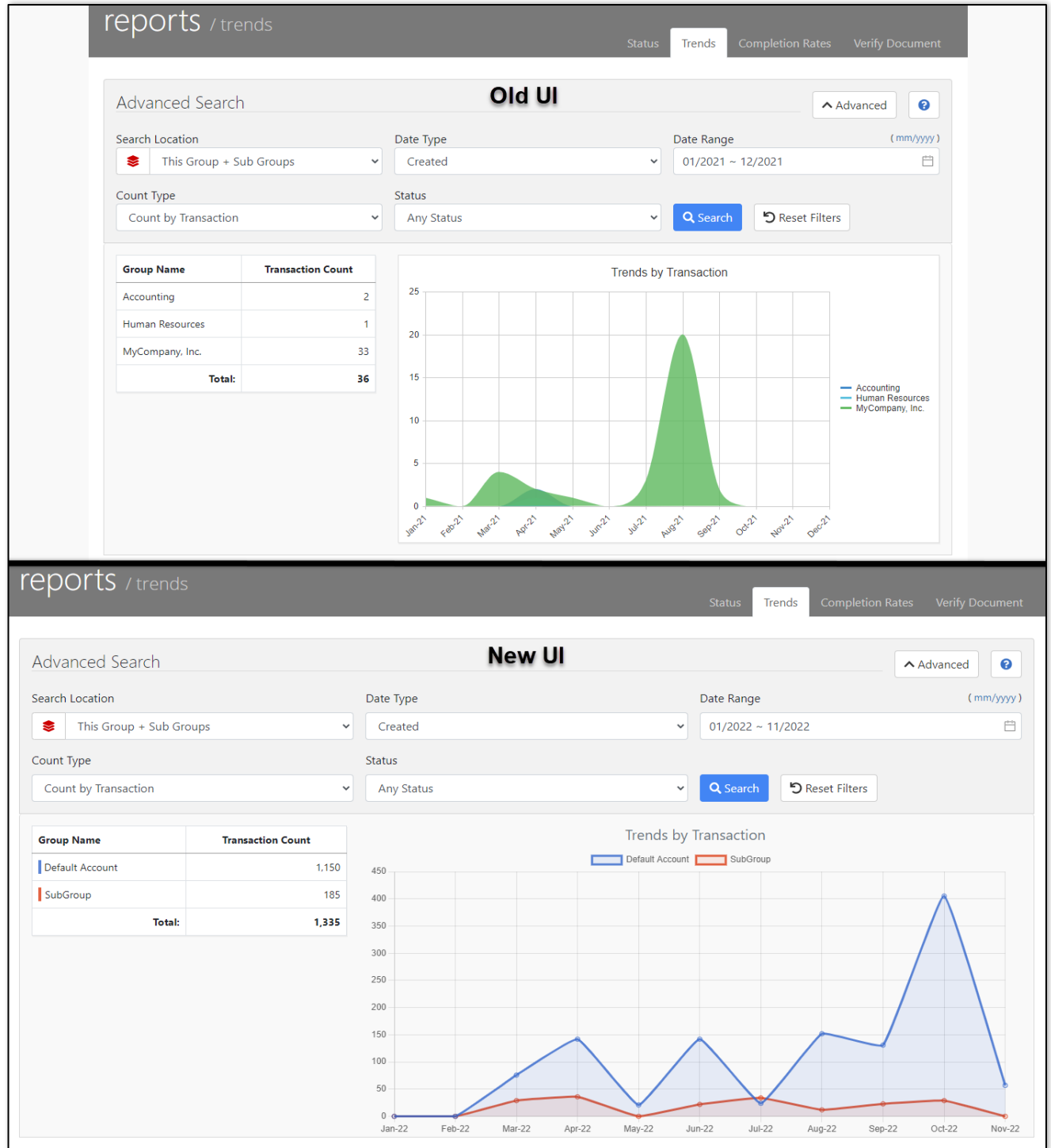
The image displays two screenshots of the MyCompany Inc. Reports Status page, illustrating UI/UX improvements.

Top Screenshot: The page shows the 'reports / status' section. A search dropdown menu is open, displaying options: Transactions, Documents, Participants, Tasks, and Everything. The search criteria include a date range of 2022-01-01 ~ 2022-09-13, Any Status, and a search button. The table below shows a single transaction with a status of 'Completed'.

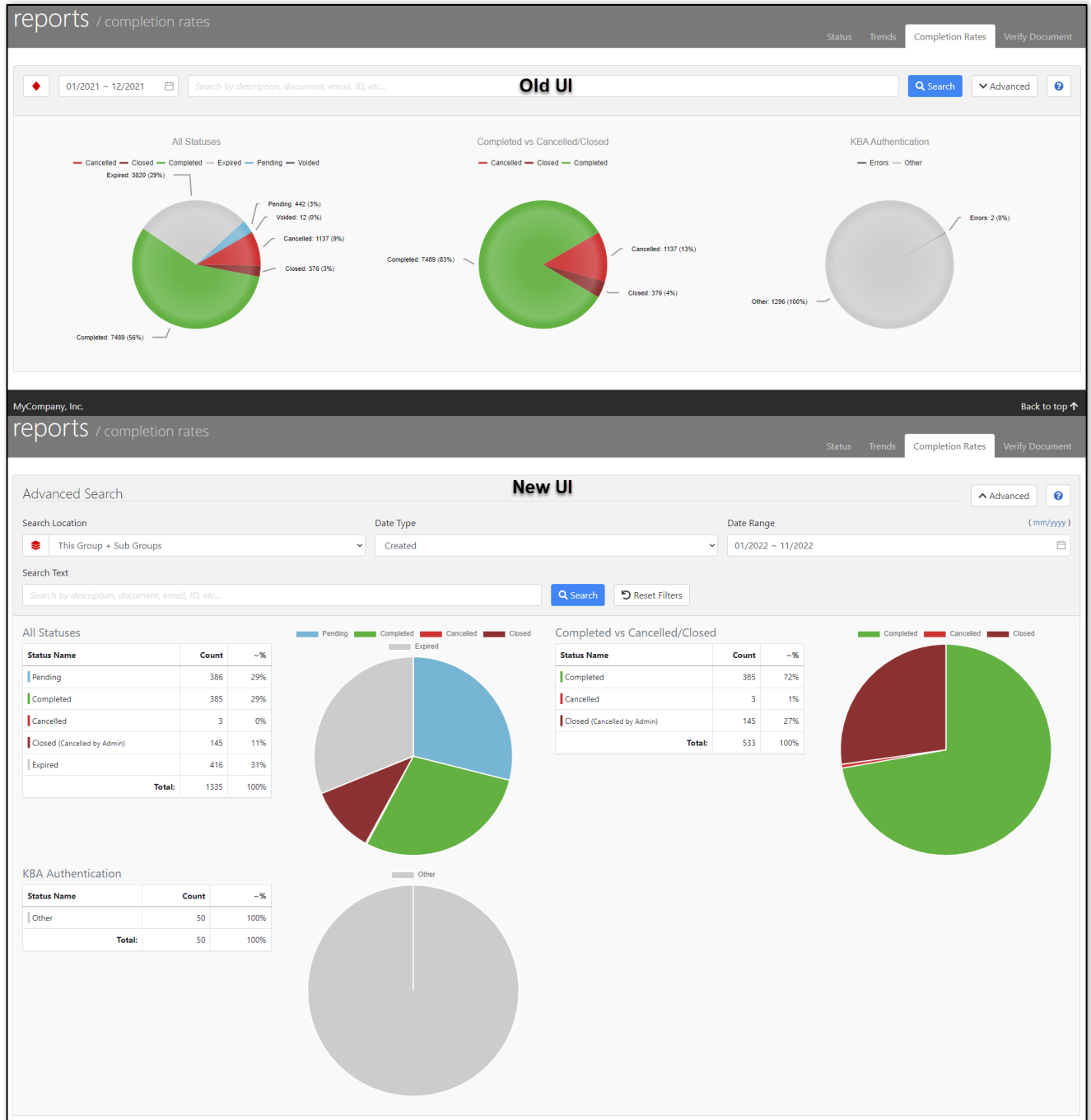
Bottom Screenshot: The page shows the 'Advanced Search' section. A search dropdown menu is open, displaying options: Transactions, Documents, Participants, Tasks, and Everything. The search criteria include a date range of 2022-01-01 ~ 2022-09-13, Any Status, and a search button. The table below shows a single transaction with a status of 'Completed'.

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

Release Notes

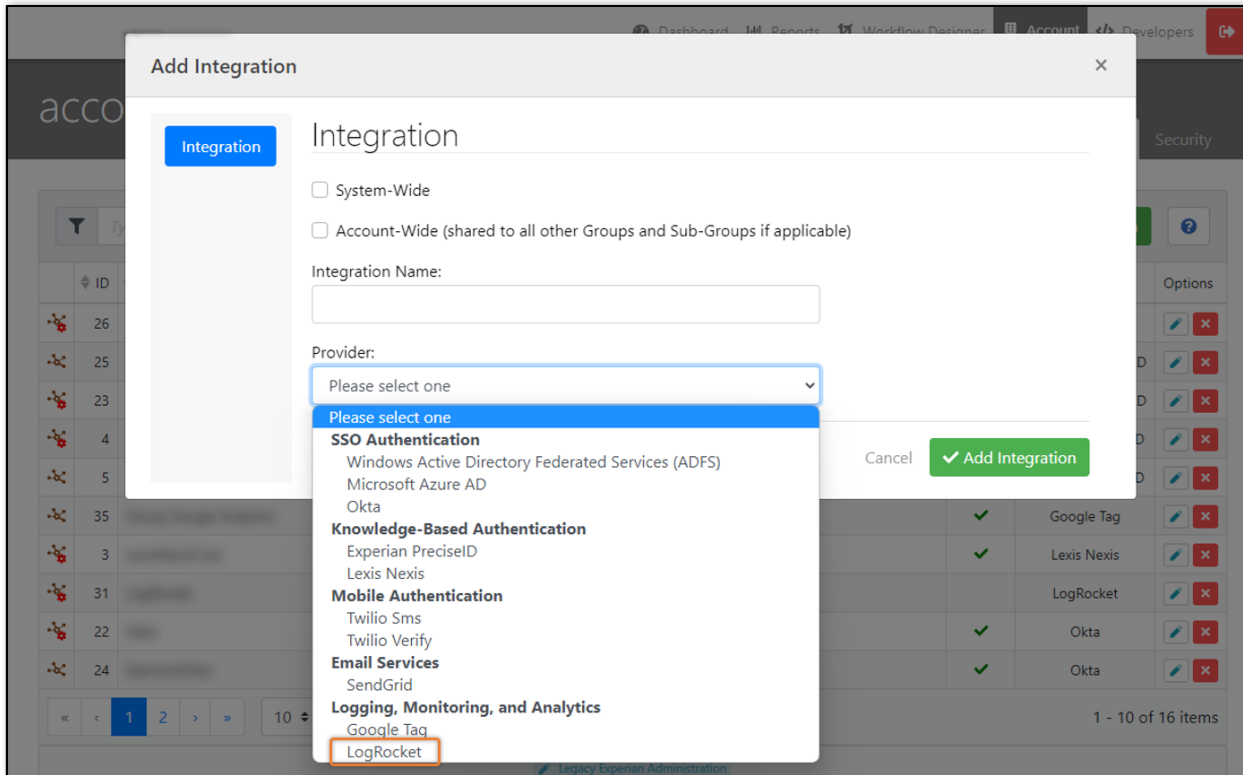


Release Notes



[PEP-5037] - Added LogRocket integration for the new Signing UI. Please reference the image below for more details.

Release Notes

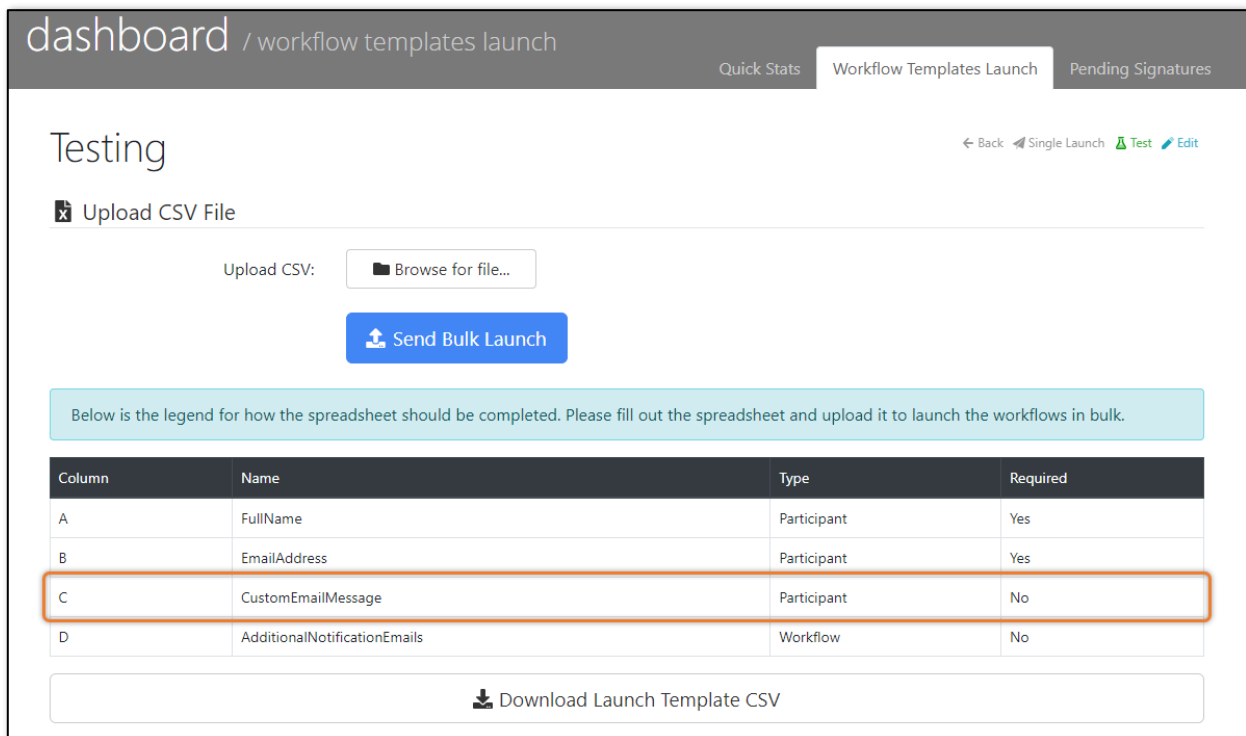


[PEP-4830] - Removed Authentication Requirement for RemoteSign() API. It now supports Password, Registered, and None. Please view the Signing Remotely developers article below for more information.

<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

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.

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

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

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

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-5904] - Updated Aspose version to 22.11.0 to fix a transparency issue with Signature Chrome images.

[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.

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**

Dashboard / workflow templates launch

Document(s) I need to sign...

Upload CSV File

Upload CSV:

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

Expected CSV Header:

	A	B	C
1	FullName*	EmailAddress*	
2			
3			
4			

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

[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 CSV 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				

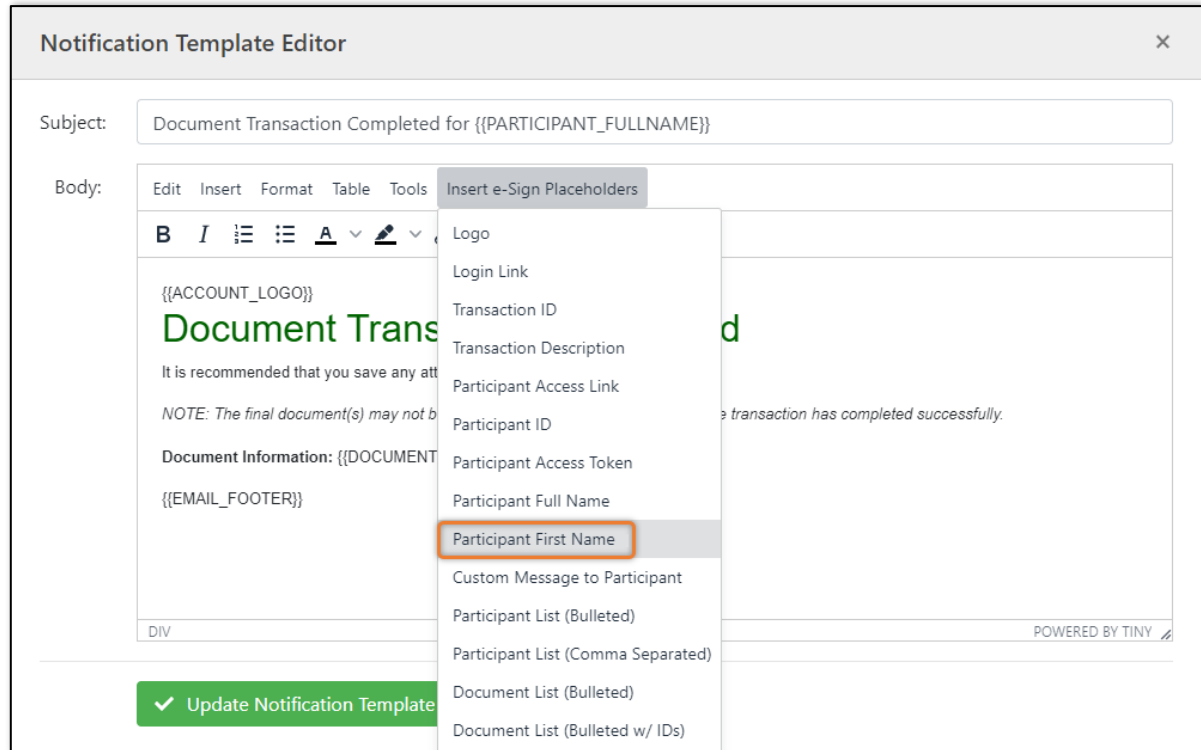
Simple

Your bulk launch has been uploaded successfully and we are currently processing 0 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.

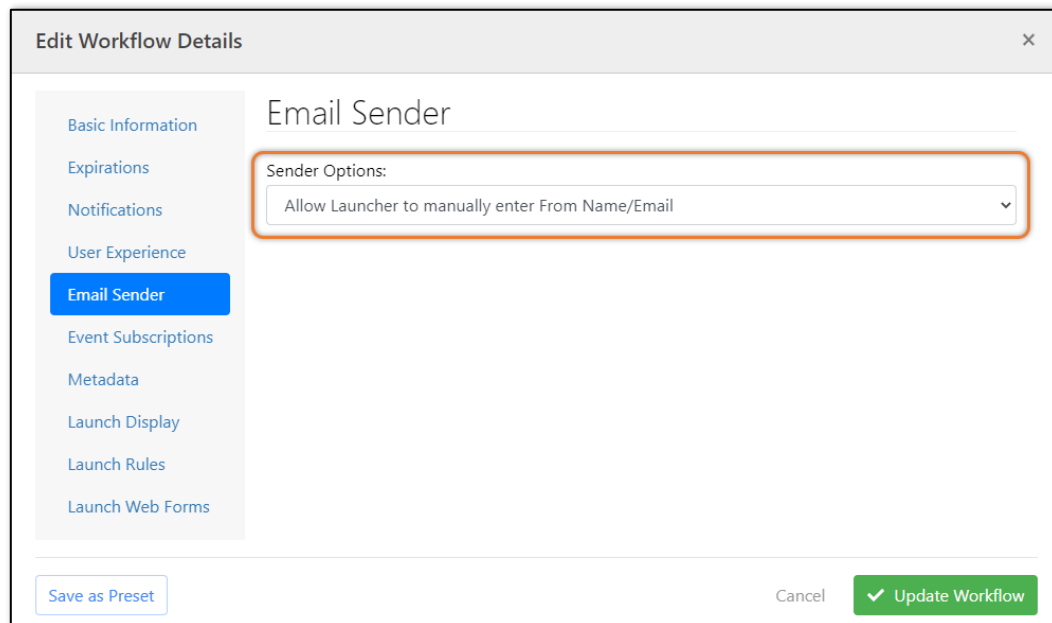
Bulk Launch Status

Release Notes

[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.



[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

dashboard / workflow templates launch

Quick StatsWorkflow Templates LaunchPending Signatures

Sample Workflow

← 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	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.

DashboardReportsWorkflow DesignerAccountDevelopers

workflow designer / workflows


WorkflowsWeb FormsDocumentsContentNotificationsBrands

Sign & Send




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

Send for Signature



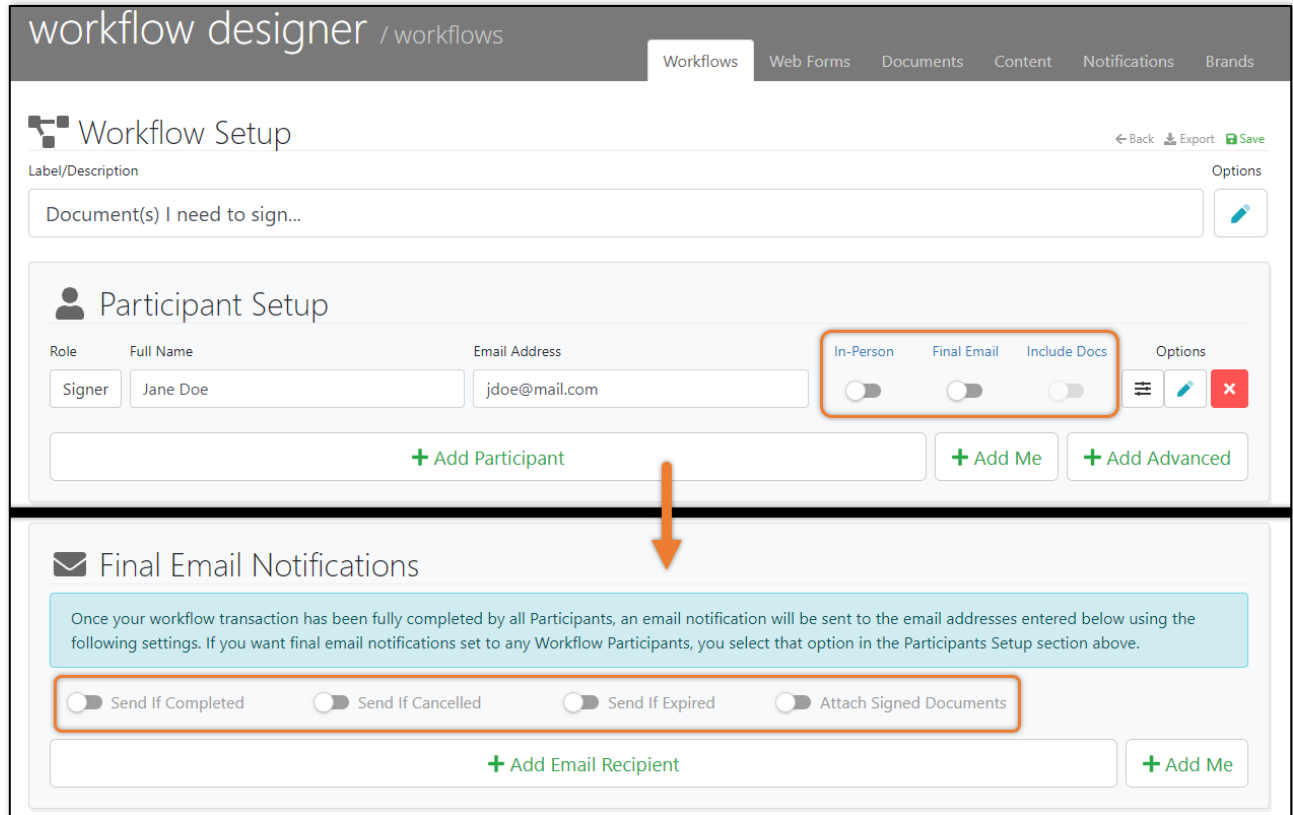
I need to send out documents to others to sign and send them back to me.

Create a Template



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

Release Notes



The image shows two screenshots from the 'workflow designer' application. The top screenshot is the 'Workflow Setup' page, specifically the 'Participant Setup' section. It features a table with columns for Role, Full Name, and Email Address. A participant named Jane Doe is listed with the role 'Signer' and email 'jdoe@mail.com'. To the right of the table are three toggle switches labeled 'In-Person', 'Final Email', and 'Include Docs'. An orange box highlights these three toggles. Below the table are buttons for '+ Add Participant', '+ Add Me', and '+ Add Advanced'. The bottom screenshot is the 'Final Email Notifications' section. It contains a blue informational box explaining that an email notification will be sent upon workflow completion. Below this are 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 buttons for '+ Add Email Recipient' and '+ Add Me'. An orange arrow points from the 'Final Email' toggle in the top screenshot to the 'Send If Completed' toggle in the bottom screenshot.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflow Setup

Label/Description

Document(s) I need to sign...

Options

Participant Setup

Role Full Name Email Address

Signer Jane Doe jdoe@mail.com

In-Person Final Email Include Docs

+ Add Participant + Add Me + Add Advanced

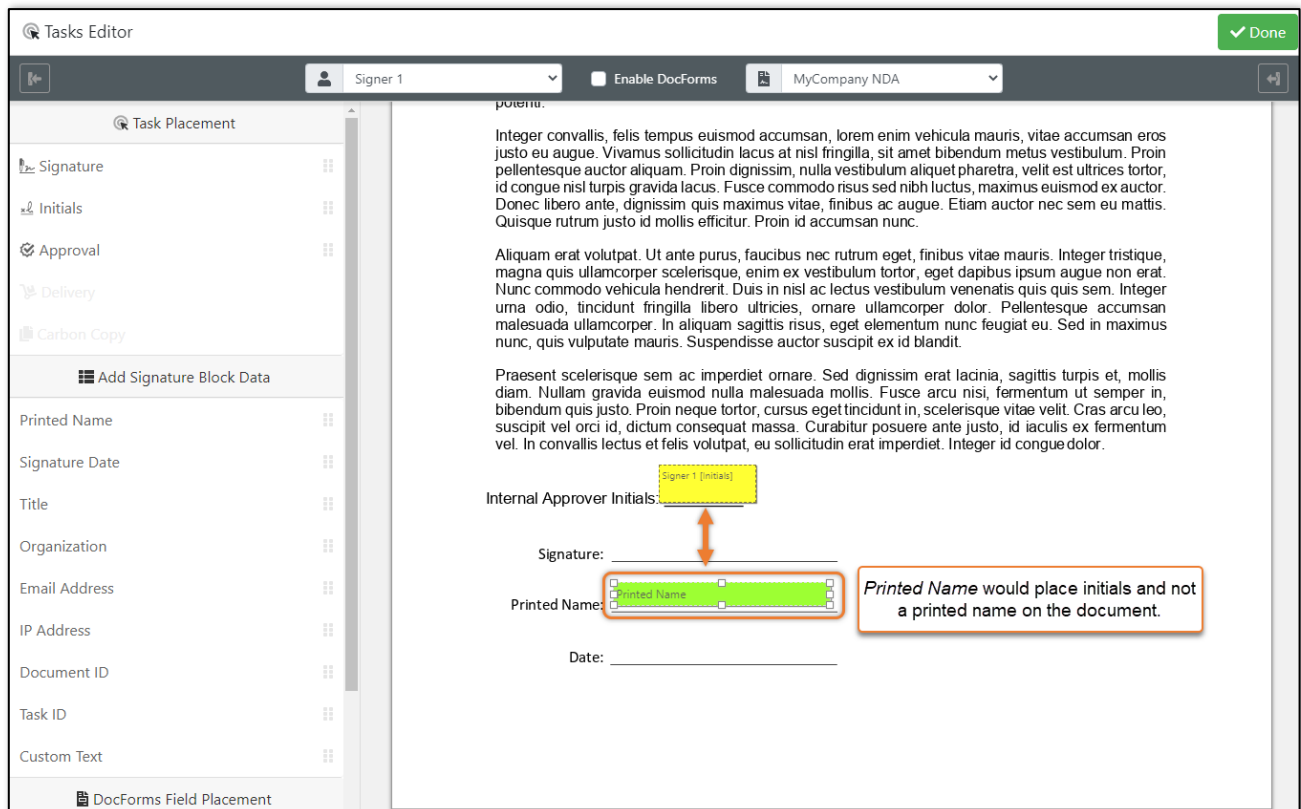
Final Email Notifications

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.

Send If Completed Send If Cancelled Send If Expired Attach Signed Documents

+ Add Email Recipient + Add Me

[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 image shows a screenshot of the 'Tasks Editor' interface. On the left is a sidebar with a 'Task Placement' section containing a list of blocks: Signature, Initials, Approval, Delivery, Carbon Copy, Add Signature Block Data, Printed Name, Signature Date, Title, Organization, Email Address, IP Address, Document ID, Task ID, and Custom Text. The 'Printed Name' block is highlighted. The main area shows a document template with a signature line and a printed name line. A yellow box labeled 'Signer 1 [Initials]' is positioned above the signature line. A red double-headed arrow points from this box to the 'Printed Name' block, which is highlighted with a green box. A text box on the right states: 'Printed Name would place initials and not a printed name on the document.' The document text includes placeholder text like 'Integer convallis, felis tempus euismod accumsan...' and 'Praesent scelerisque sem ac imperdiet ornare...'.

Tasks Editor

Signer 1

Enable DocForms

MyCompany NDA

Task Placement

Signature

Initials

Approval

Delivery

Carbon Copy

Add Signature Block Data

Printed Name

Signature Date

Title

Organization

Email Address

IP Address

Document ID

Task ID

Custom Text

DocForms Field Placement

Integer convallis, felis tempus euismod accumsan, lorem enim vehicula mauris, vitae accumsan eros justo eu augue. Vivamus sollicitudin lacus at nisl fringilla, sit amet bibendum metus vestibulum. Proin pellentesque auctor aliquam. Proin dignissim, nulla vestibulum aliquet pharetra, velit est ultrices tortor, id congue nisl turpis gravida lacus. Fusce commodo risus sed nibh luctus, maximus euismod ex auctor. Donec libero ante, dignissim quis maximus vitae, finibus ac augue. Etiam auctor nec sem eu mattis. Quisque rutrum justo id mollis efficitur. Proin id accumsan nunc.

Aliquam erat volutpat. Ut ante purus, faucibus nec rutrum eget, finibus vitae mauris. Integer tristique, magna quis ullamcorper scelerisque, enim ex vestibulum tortor, eget dapibus ipsum augue non erat. Nunc commodo vehicula hendrerit. Duis in nisl ac lectus vestibulum venenatis quis quis sem. Integer urna odio, tincidunt fringilla libero ultricies, ornare ullamcorper dolor. Pellentesque accumsan malesuada ullamcorper. In aliquam sagittis risus, eget elementum nunc feugiat eu. Sed in maximus nunc, quis vulputate mauris. Suspendisse auctor suscipit ex id blandit.

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: Signer 1 [Initials]

Signature: Printed Name

Printed Name: Printed Name

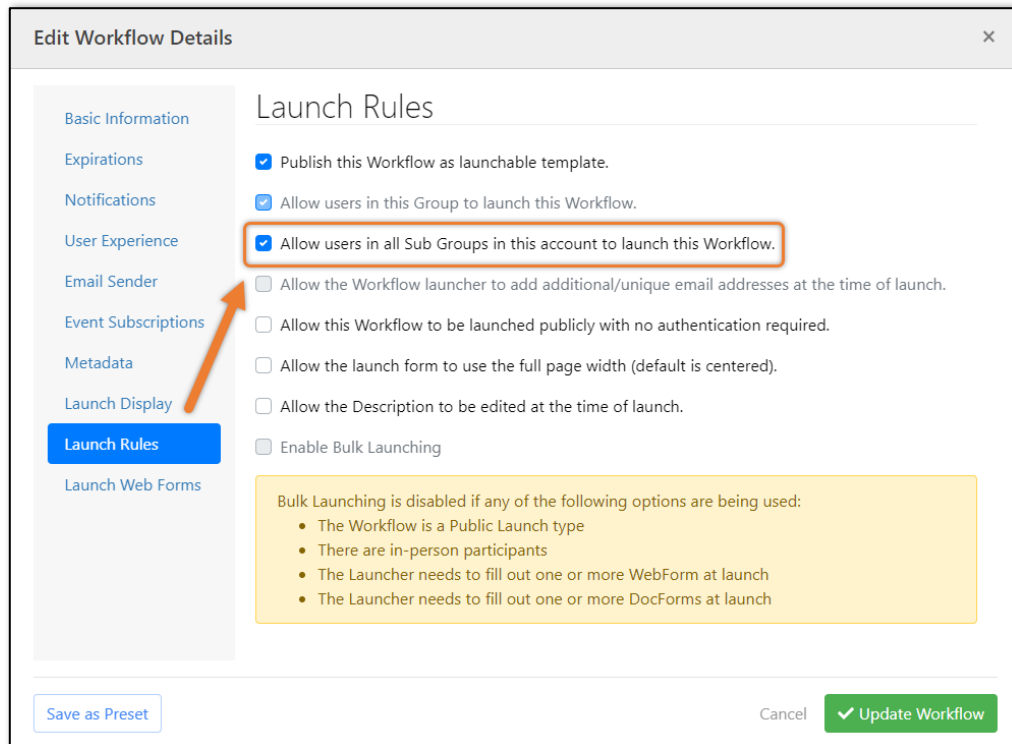
Date:

Printed Name would place initials and not a printed name on the document.

[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

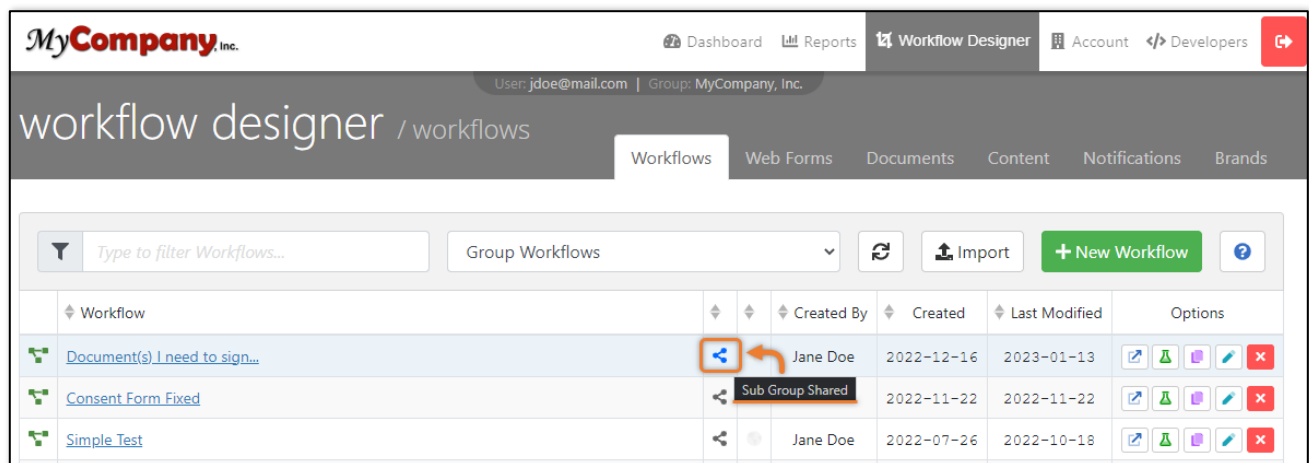
Launch Rules

- ☒ 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

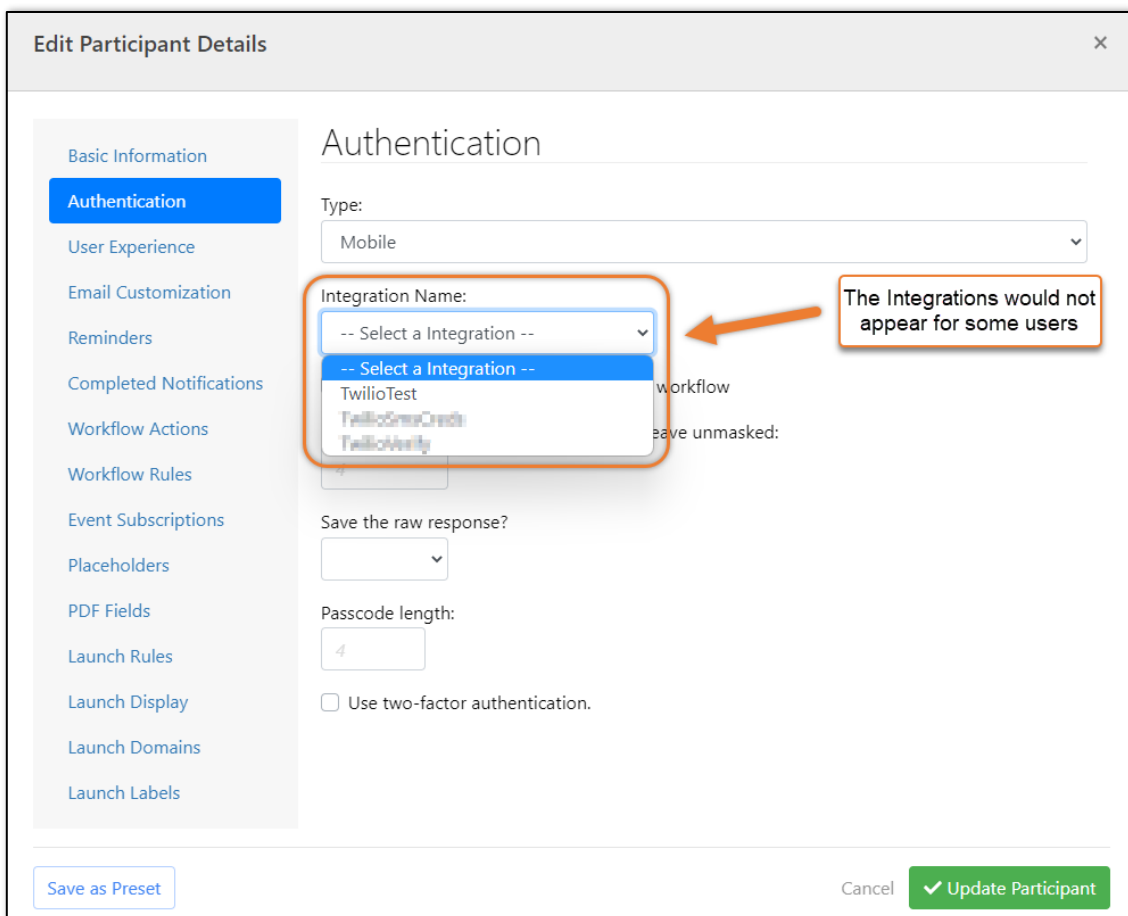
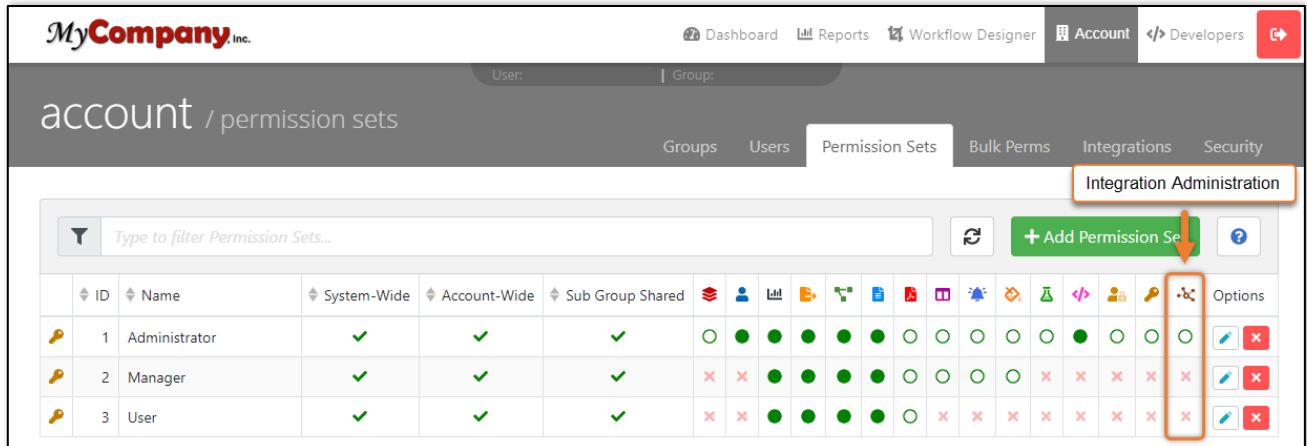
Type to filter Workflows... Group Workflows Import + New Workflow ?

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.

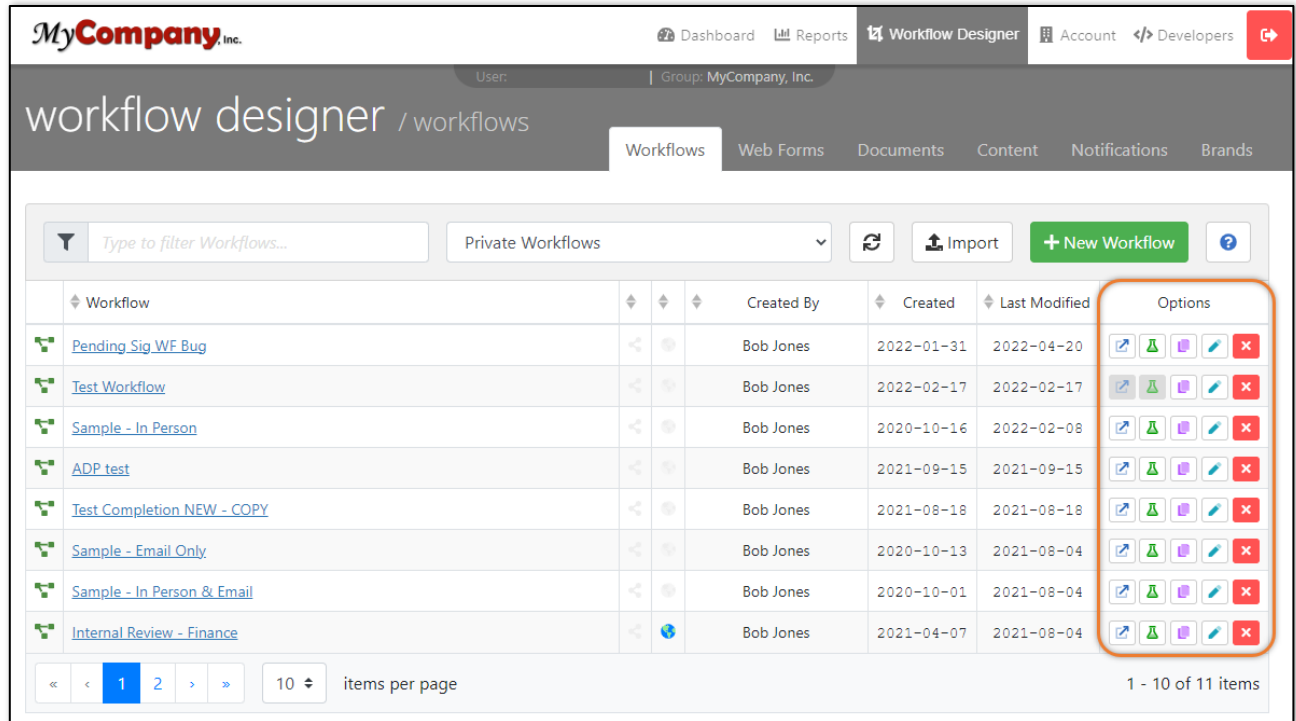
[PEP-5442] - Fixed issue where when selecting Mobile Authentication integration for a participant the *Integration Name* dropdown would not populate with selectable integrations. This issue would specifically affect users that did not have permission to *Integration Administration*. Please see the image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

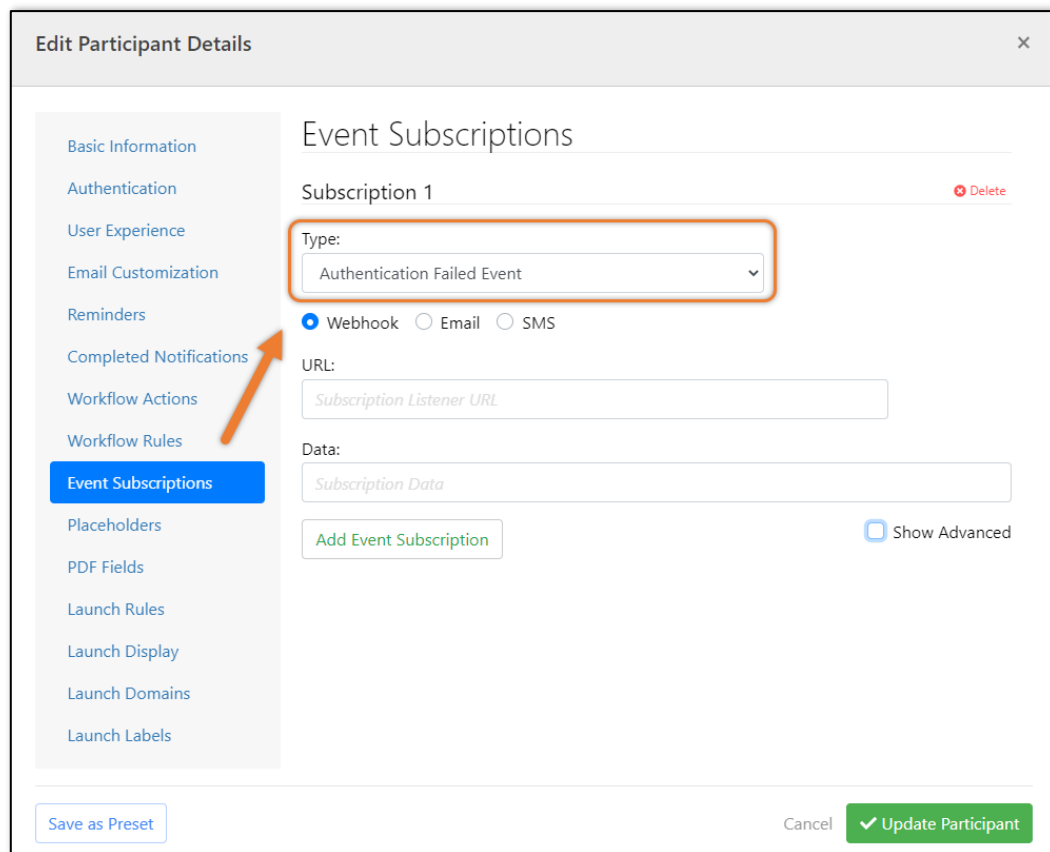
Release Notes



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 / workflows'. The left sidebar contains tabs for 'Workflows', 'Web Forms', 'Documents', 'Content', 'Notifications', and 'Brands'. The main content area shows a list of workflows with columns for 'Workflow', 'Created By', 'Created', and 'Last Modified'. A table of workflows is displayed, with an 'Options' column highlighted by an orange box. The table includes workflows like 'Pending_Sig_WF_Bug', 'Test Workflow', 'Sample - In Person', 'ADP test', 'Test Completion NEW - COPY', 'Sample - Email Only', 'Sample - In Person & Email', and 'Internal Review - Finance'. The 'Options' column for each workflow contains icons for edit, delete, and other actions. At the bottom, there is a pagination control showing '1 - 10 of 11 items'.

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]

[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.



The screenshot shows the 'Edit Participant Details' dialog box with the 'Event Subscriptions' tab selected. The left sidebar lists various settings like 'Basic Information', 'Authentication', 'User Experience', etc. The main content area is titled 'Event Subscriptions' and shows 'Subscription 1' with a 'Delete' button. A dropdown menu for 'Type:' is highlighted with an orange box and contains the option 'Authentication Failed Event'. Below this, there are radio buttons for 'Webhook', 'Email', and 'SMS', with 'Webhook' selected. There are also input fields for 'URL:' (containing 'Subscription Listener URL') and 'Data:' (containing 'Subscription Data'). At the bottom, there is an 'Add Event Subscription' button and a 'Show Advanced' checkbox. The bottom of the dialog has 'Save as Preset', 'Cancel', and 'Update Participant' buttons.

[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

The 'Edit Participant Details' dialog box is shown with the 'Authentication' tab selected. The 'Type' dropdown is set to 'Mobile'. The 'Integration Name' dropdown is set to '-- Select a Integration --'. The checkbox 'Set permanent phone number for this workflow' is checked. The 'Send to mobile phone number' field is highlighted with a red box and contains the value '+447975777666'. The 'Number of phone number characters to leave unmasked' field is set to '4'. The 'Save the raw response?' dropdown is set to 'No'. The 'Passcode length' field is set to '4'. The 'Use two-factor authentication' checkbox is unchecked. At the bottom, there are buttons for 'Save as Preset', 'Cancel', and 'Update Participant'.

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.

The 'Edit Task Details' dialog box is shown with the 'Workflow Actions' tab selected. The 'Action 1' dropdown is set to 'Document Review'. The 'Add Workflow Action' button is visible. The 'Show Advanced' checkbox is unchecked. At the bottom, there are buttons for 'Cancel' and 'Update Task'. An orange arrow points from the 'Document Review' dropdown in the dialog box to the 'Document Review' page below.

Basic Information

User Experience

Style

Placement

Workflow Actions

Event Subscriptions

Launch

Workflow Actions

Action 1

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.

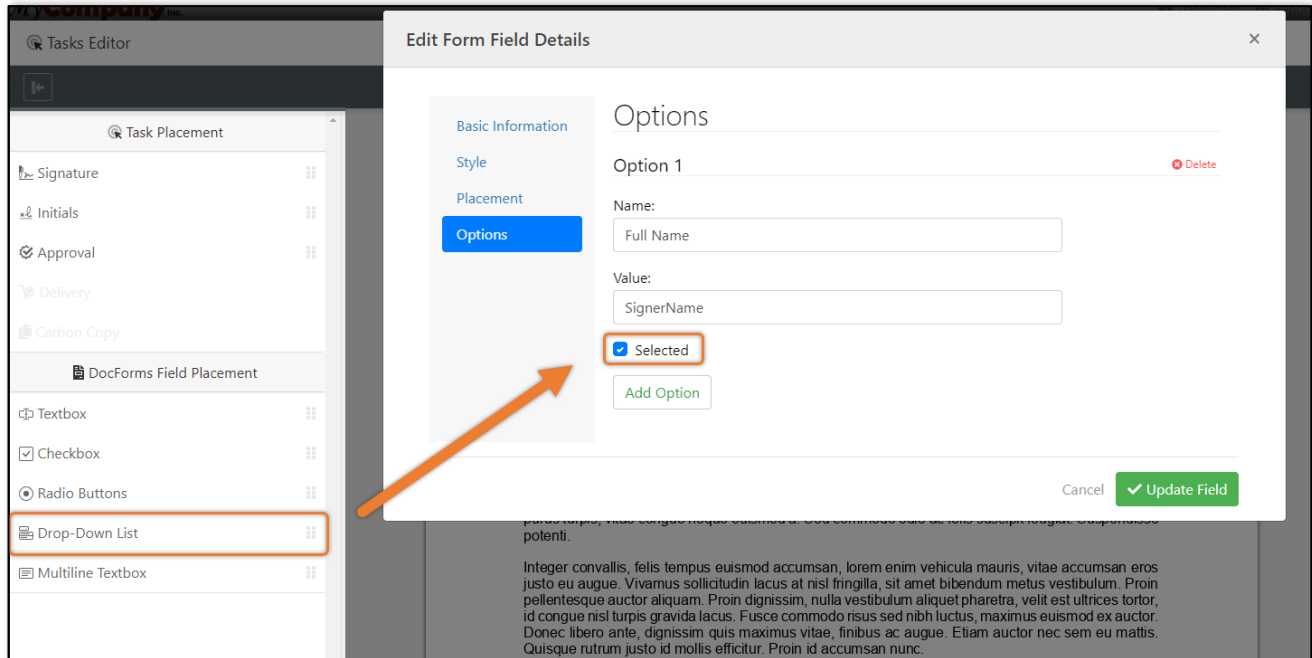
Document	Options
Test Document	Open
Sample Document1	Open

Continue

Both documents should not appear on the Document Review page.

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

The screenshot shows the 'Edit Group' dialog box with the 'Security' tab selected. The left sidebar lists various settings: Basic Information, Document Integrity, Security (highlighted), Privacy Policy, User Experience, Logo, Multi-Factor Authentication, and Email Services. The main content area is titled 'Security' and contains the following fields:

- Session Expiration:** A text input field with '30' and a dropdown menu set to 'minutes'. A note '(leave blank for default)' is present.
- Users Password Change Required:** A dropdown menu set to '# of Days Until Password Change'.
- Require after:** A text input field with '30', which is highlighted with an orange border.
- Change API Secret:** A text input field with a masked value and a 'Generate Token' button.
- KBA Allow Fail:** A dropdown menu set to 'None'.
- Lock out System-Wide Administrators:** An unchecked checkbox.
- Enable User Permissions to automatically cascade to Sub-Groups:** A checked checkbox.

At the bottom right, there are 'Cancel' and 'Update Group' buttons.

[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.

The screenshot shows the 'Edit Group' dialog box with the 'Document Integrity' tab selected. The left sidebar lists various settings: Basic Information, Document Integrity (highlighted), Security, Privacy Policy, User Experience, Logo, Multi-Factor Authentication, and Email Services. The main content area is titled 'Document Integrity' and contains the following fields:

- Document Retention:** A dropdown menu set to 'Purge at specified # of days after 'Completed''.
- Retention Days Before Purge:** A text input field with '40', which is highlighted with an orange border.
- Enforce Digital Signature:** A dropdown menu set to 'None'.

A yellow callout box is present below the 'Retention Days Before Purge' field, containing the text: "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."

At the bottom right, there are 'Cancel' and 'Update Group' buttons.

[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.

Release Notes

The 'Edit User' dialog box has a sidebar with tabs: 'Basic Information', 'Organization' (selected), 'Permissions', and 'SSO Logins'. The 'Organization' tab contains the following fields:

- Group:** A dropdown menu with 'MyCompany Inc' selected.
- Title:** An empty text input field.
- Organization:** An empty text input field.
- Required Password Change Schedule:** A dropdown menu with 'Never' selected. This field is highlighted with an orange border.

At the bottom right, there are two buttons: 'Cancel' and 'Update User' (with a green checkmark icon).

v5.15.10 Release

Release Date: 11/3/2022

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 form is titled 'MyCompany Inc.' and '3. Your Employment Details'. It contains the following fields:

- Your current job(s):** An empty text input field.
- Length of service:** An empty text input field.
- Please indicate your current employment status (tick all that apply):** A section with four checkboxes:
 - ☒ Employed
 - ☒ Self-Employed
 - ☐ Company Director
 - ☐ UnemployedA red vertical line is to the right of the checkboxes, and the word 'Required' is in red text.
- Please state your normal working hours:** An empty text input field.

[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 'Document Setup' dialog box has three main sections:

- Upload Documents from your computer:** Includes a 'Browse for documents to upload...' button.
- Choose from the Documents repository:** Includes a '-- Select an existing Document Tem...' dropdown.
- Upload the Document on the launch page:** Includes a '+ Use a Blank Template' button.

At the bottom, there is a red error bar with the following information:

- Document icon and name: MyCompany_NDA1.pdf
- Size: 251 KB
- Status: error
- Refresh and Close icons

Release Notes

[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 Designer' interface for 'MyCompany, Inc.'. The 'Workflow Setup' section is active, showing a 'Simple Test' workflow. Below this, the 'Participant Setup' section is visible. It includes a table with columns for Role, Full Name, Email Address, and In-Person. The 'In-Person' toggle is highlighted with a red box. Below the table are buttons for '+ Add Participant', '+ Add Me', and '+ Add Advanced'.

The screenshot shows the 'Edit Participant Details' dialog box. The 'Workflow Rules' tab is selected. Under 'Workflow Rules', the checkbox 'Allow participant to reassign tasks to a different person if necessary.' is highlighted with a red box. Other options include 'Verify/Query for' (Full Name, Email Address, Title, Organization) and 'Document Access Window' (Leave Document available, 0 minutes after completed). At the bottom, there are buttons for 'Save as Preset', 'Cancel', and 'Update Participant'.

v5.15.9 Release

Release Date: 10/20/2022

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 image displays two screenshots of the 'Edit Participant Details' dialog box, specifically the 'Authentication' tab. The top screenshot shows the 'Integration Name' dropdown menu with the text '-- Select a Integration --'. A callout box labeled 'Manager and User view' points to this dropdown. The bottom screenshot shows the same dialog box, but the 'Integration Name' dropdown menu is expanded, showing options: 'TwilioTest', 'TwilioSmsCreds', and 'TwilioVerify'. A callout box labeled 'Administrator view' points to this expanded dropdown, and a note states 'Note: All Users should have this view'. An orange arrow points from the top screenshot to the bottom one, indicating a change in the dropdown options.

account / permission sets

Groups Users Permission Sets Bulk Perms Integrations Security

Type to filter Permission Sets...

+ Add Permission Set

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

MyCompany

workflo

Work

Label/Description

Simple Test

Part

Role Full Na

Me Rac

Authentication

Type: Mobile

Integration Name: -- Select a Integration --

Set permanent phone number for this workflow

Number of phone number characters to leave unmasked: 4

Manager and User view

Preset: -- Apply a Preset --

Manage Presets

Authentication

Type: Mobile

Integration Name: -- Select a Integration --

TwilioTest

TwilioSmsCreds

TwilioVerify

Administrator view

Note: All Users should have this view

[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

Release Date: 10/6/2022

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.

The screenshot displays the 'workflow designer / workflows' interface. The top navigation bar includes 'Workflows', 'Web Forms', 'Documents', 'Content', 'Notifications', and 'Brands'. The main content area is divided into three sections: 'Workflow Setup', 'Participant Setup', and 'Document Setup'.

Workflow Setup: Includes a 'Label/Description' field with the value 'Sample Workflow' and an 'Options' button.

Participant Setup: Includes a table for participants with columns: Role, Full Name, Email Address, In-Person, Final Email, Include Docs, and Options. The first participant is 'Signer 1', 'Jane Doe', 'jdoe@gmail.com'. Below the table are buttons: '+ Add Participant', '+ Add Me', and '+ Add Advanced'.

Document Setup: Includes three options: 'Upload Documents from your computer', 'Choose from the Documents repository', and 'Upload the Document on the launch page'. The 'Upload the Document on the launch page' option is highlighted with an orange border and contains a '+ Use a Blank Template' button.

Tasks Editor: Includes a 'Tasks' table with columns: Label, Task Type, Placeholder Type, Placeholder/Position, Participant, and Options. The first task is 'Sig 1', 'Signature', 'Form Field Name', 'Sig1', 'Jane Doe'. Below the table is a '+ Add Task' button. An orange arrow points from the '+ Use a Blank Template' button in the Document Setup section to the 'Blank Template' dropdown in the Tasks Editor.

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"/>	Options

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

Release Notes

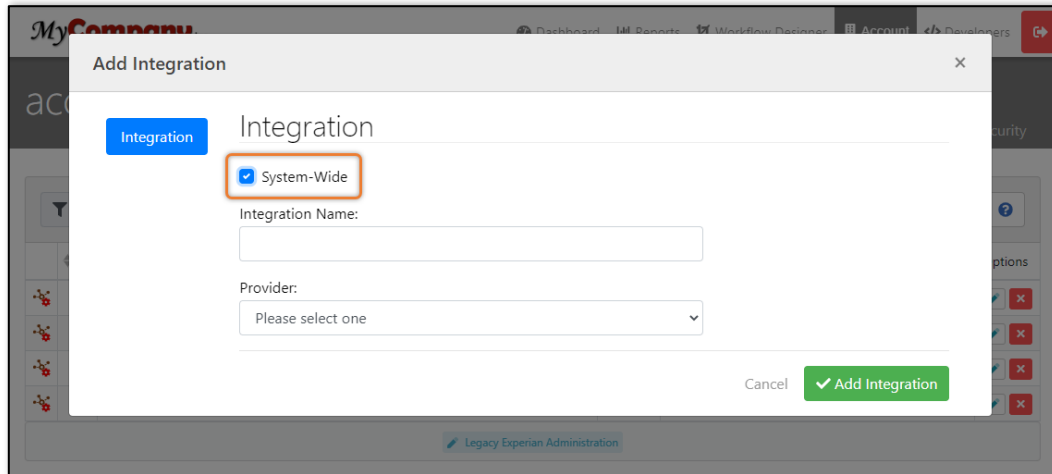
The screenshot shows a web interface with a red error banner at the top that reads "An Error Occurred" and "An error occurred. Please check the developer console for details." Below the banner, the text "123ABC" is displayed. Under the heading "Signer 1 Information", there is a "Full Name:" label and a text input field containing "test". Below this is a section titled "Report Details" with a "Transaction Description:" label and an empty text input field. Further down, there is a document upload section with a "Browse for file..." button and a green "Upload Complete" status indicator. At the bottom, there is a blue "Start Workflow" button and a "Processing Document(s)..." status indicator. The version number "v5.15.7.0" is visible at the very bottom.

[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 box with the "Authentication" tab selected. On the left is a sidebar with 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 Domains, and Launch Labels. The main content area is titled "Authentication" and contains the following settings: "Type:" set to "One-time PIN/Password", an unchecked checkbox for "Set permanent password for this workflow", a checked checkbox for "Use two-factor authentication.", and a section for "Second-Factor Authentication". In the second-factor section, "Type:" is set to "Mobile", "Credential Name:" is set to "TwilioCreds", there is an unchecked checkbox for "Set permanent phone number for this workflow", an empty "Send to mobile phone number:" field, "Number of phone number characters to leave unmasked:" set to "4", "Save the raw response?" set to "No", and "Passcode length:" set to "4". At the bottom, there are three buttons: "Save as Preset", "Cancel", and "Update Participant".

Release Notes

[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.



Add Integration

Integration

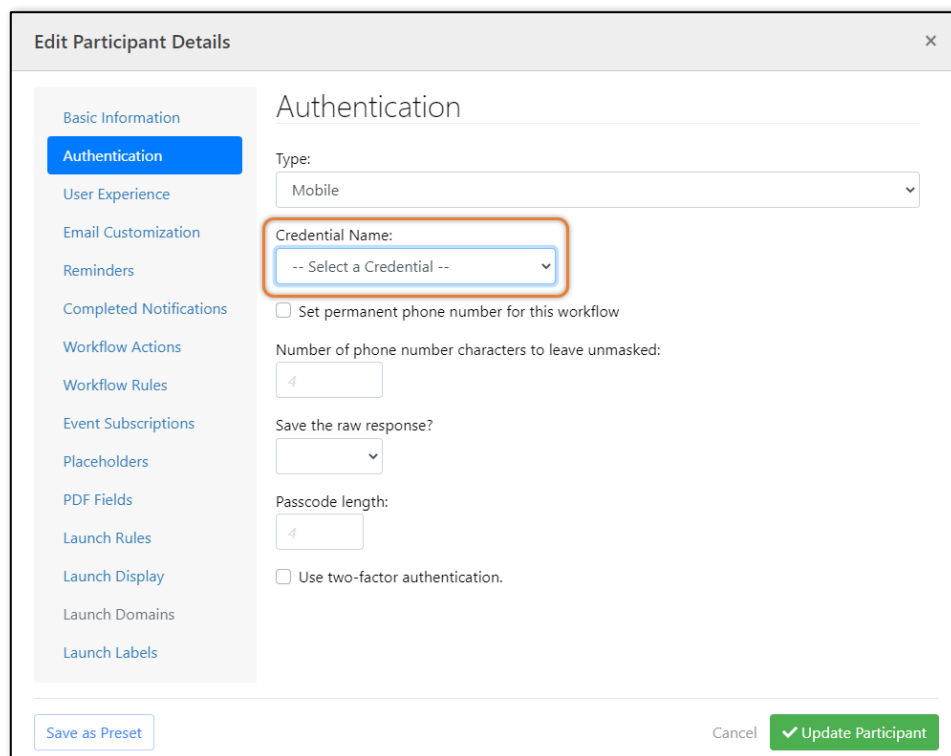
☒ System-Wide

Integration Name:

Provider:

Please select one

Cancel Add Integration



Edit Participant Details

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

Release Date: 9/23/2022

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.



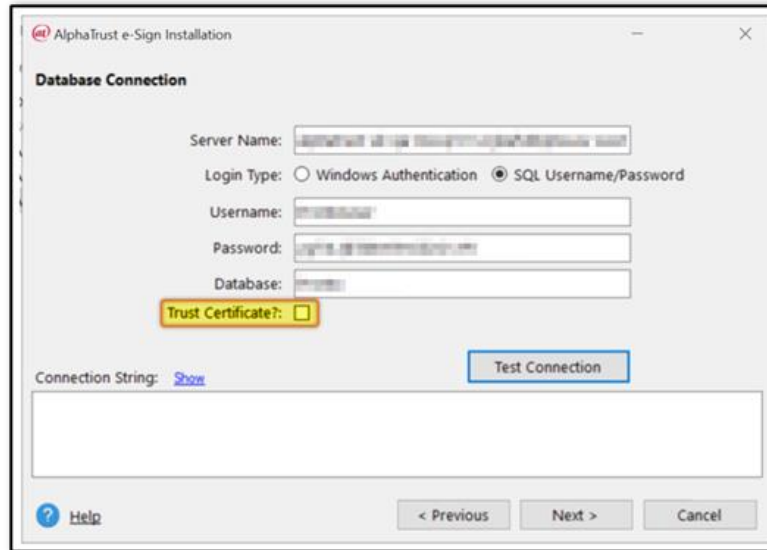
Recurring premium payments

Recurring Premium Payment: ☒ Required

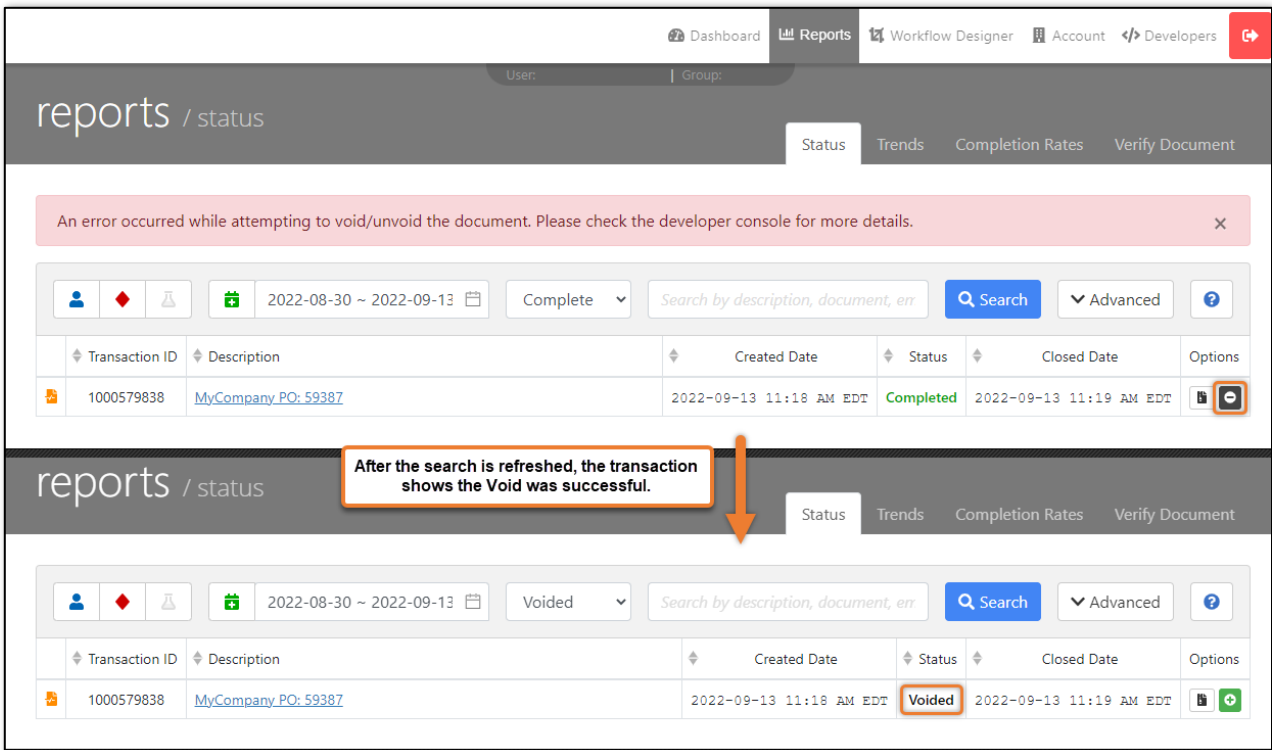
Amount: \$ 4321

Release Notes

[PEP-5533] - Fixed issue where services were unable to start correctly. Services wouldn't run without the Trust Server Certificate=true in the connections string. SQL Server uses a certificate when communicating. SQL Server will create a self-signed certificate if a certificate is not installed. This can cause issues with proper operation. An option exists on the connection string, Trust Server Certificate, which allows the consumer to trust any certificate provided by SQL Server. These changes make it possible to turn on the feature through the installer and to persist the feature in future updates. Please see an image of the setting referenced below.



[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.



[PEP-5389] - Fixed issue where existing values for App pools wouldn't persist after upgrading the software. Specific application pool properties will now be restored during an upgrade. The following settings will no longer be reset after an upgrade: SignApiPool, Process Model, Idle Time-out (minutes) - 0, Maximum Worker Processes - 2, Recycling, Regular Time Interval (minutes) - 0, and Specific Time - 03:45:00.

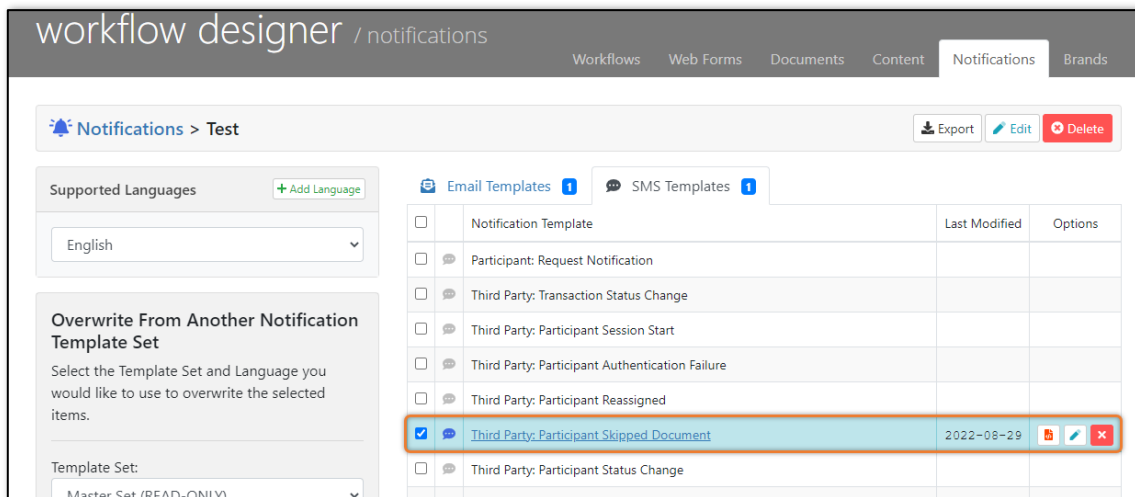
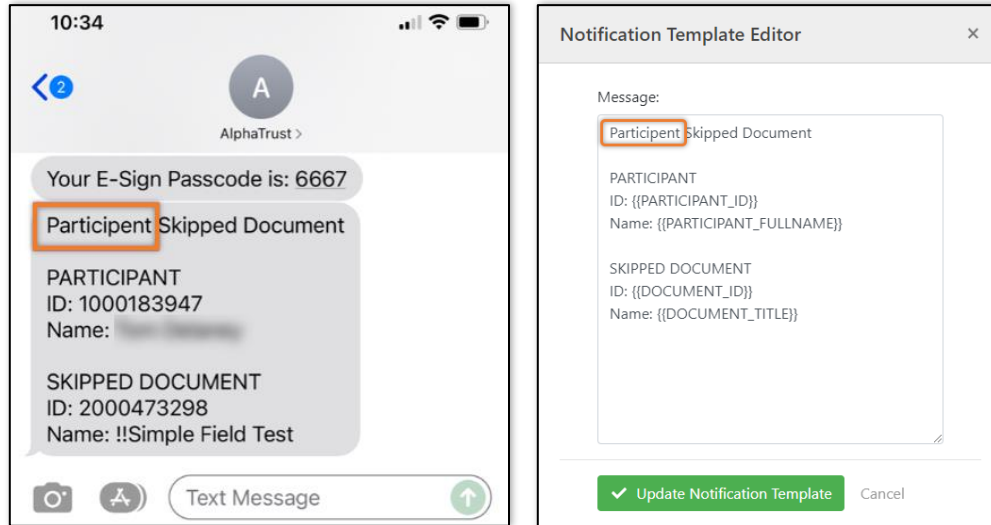
Release Notes

v5.15.6 Release

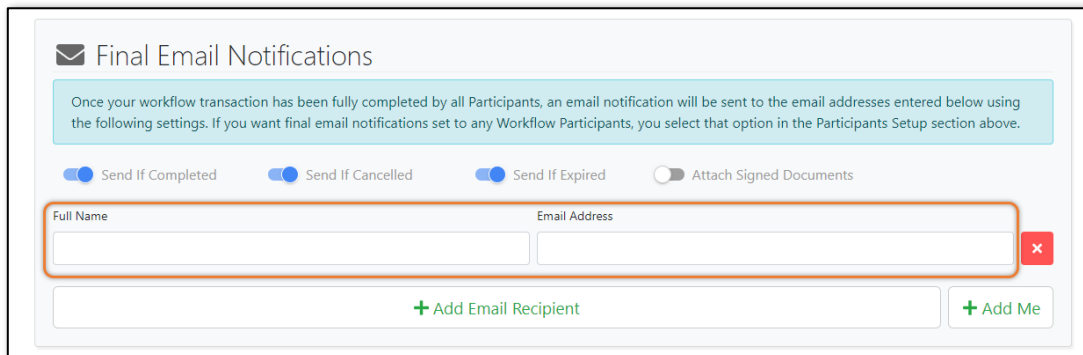
Release Date: 9/8/2022

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.



[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.



[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.

Release Notes

[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.



v5.15.5.2 Release

Release Date: 9/7/2022

Bug Fixes

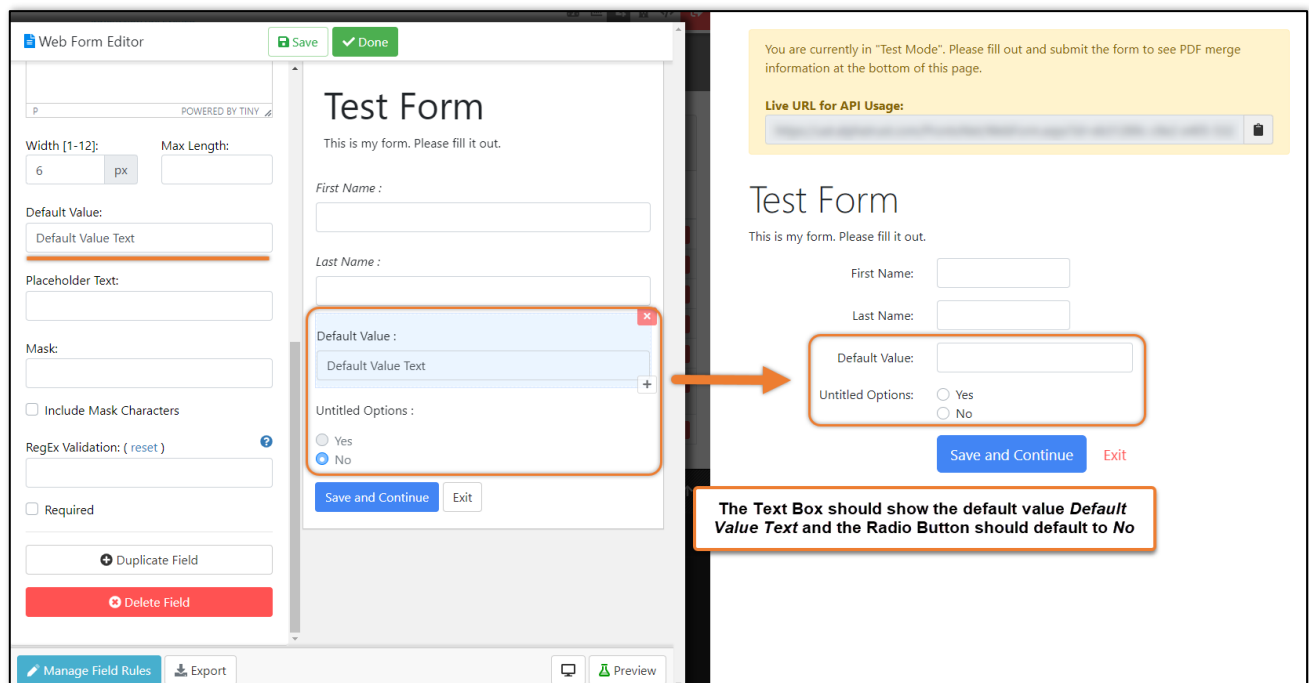
[PEP-5496] - Fixed issue where the CreateTransactions() API call was not merging values into form fields.

v5.15.5.1 Release

Release Date: 8/31/2022

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.



Release Notes

[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.

The image displays two side-by-side screenshots of the 'Import Workflow' interface, comparing the 'Old Format' (left) and 'New Format' (right).

Old Format: This interface shows a list of workflow components. Each component has a 'Source' and a 'Target' field, and a status indicator (New or Existing). The components are categorized into Workflow, Web Forms, Content, and Notifications. For example, under 'Web Forms', there are 'Proposed Insured Location' and 'Policy Information for Delivery', both marked as 'New'. Under 'Content', there are 'BGA', 'Agent', and 'Customer', all marked as 'Existing'. Under 'Notifications', there are 'BGAv2', 'BGAv2a', 'AgentV2a', and 'CustomerV2', with the first three marked as 'New' and the last one as 'Existing'.

New Format: This interface shows a similar list of workflow components. However, the 'Status' column now includes an 'Include/Exclude' toggle. A red box highlights a new item, 'Policy Information for Delivery', which is marked as 'New'. A red arrow points to the 'Include/Exclude' toggle for this item, which is currently set to 'Include'. A dropdown menu is open for this item, showing a list of existing items: 'Proposed Insured Location', 'Policy Information for Delivery', 'PID', 'My Untitled Form', 'Relevant Life Trust Form', 'My Untitled Form', 'Witness', and 'DFLC'. The 'Include/Exclude' toggle is only visible for existing items.

Annotations: A red box in the 'New Format' screenshot contains the text: 'New items will not have the option to Include/Exclude. New items will still have the ability to override existing versions.' A red arrow points from this box to the 'Include/Exclude' toggle for the 'Policy Information for Delivery' item.

[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.

Release Notes

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

Phone Number:

Send Workflow

Phone Number field should not appear on the Launch Page.

MyCompany, Inc. Back to top

v5.15.5 Release

Release Date: 8/25/2022

Bug Fixes

[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.

Release Notes

```
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:

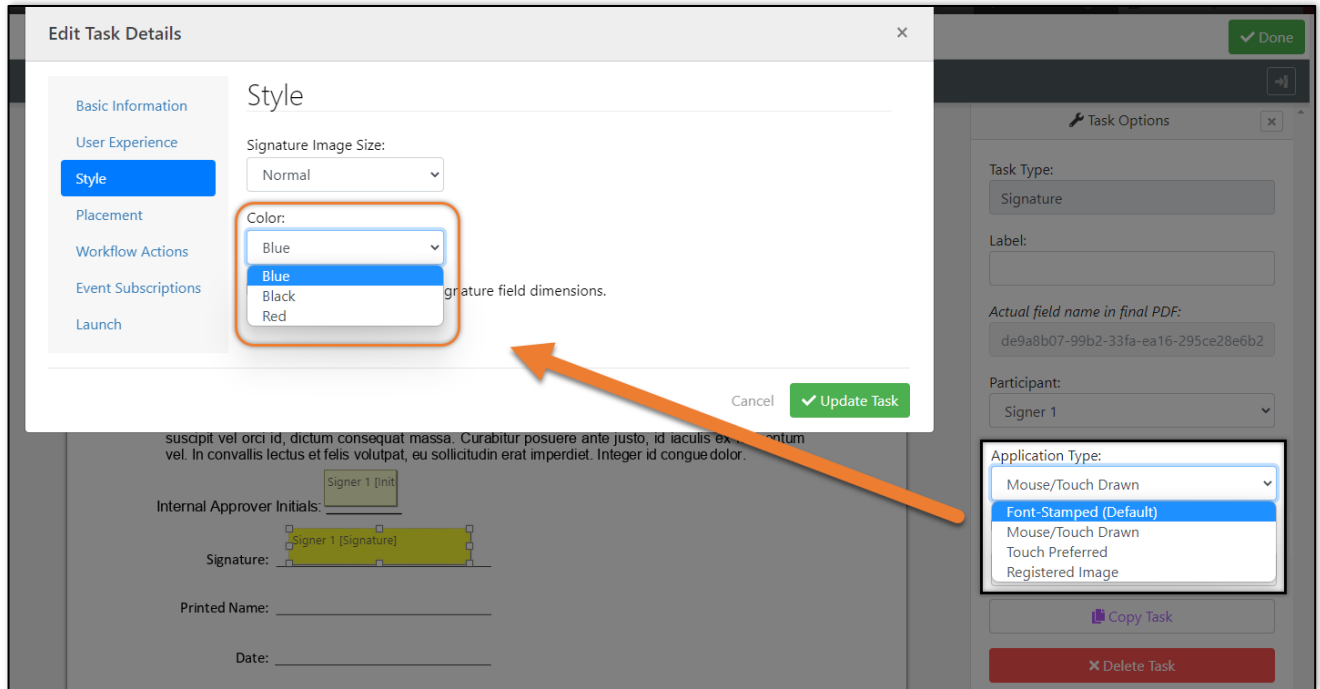
Data:

☐ Show Advanced

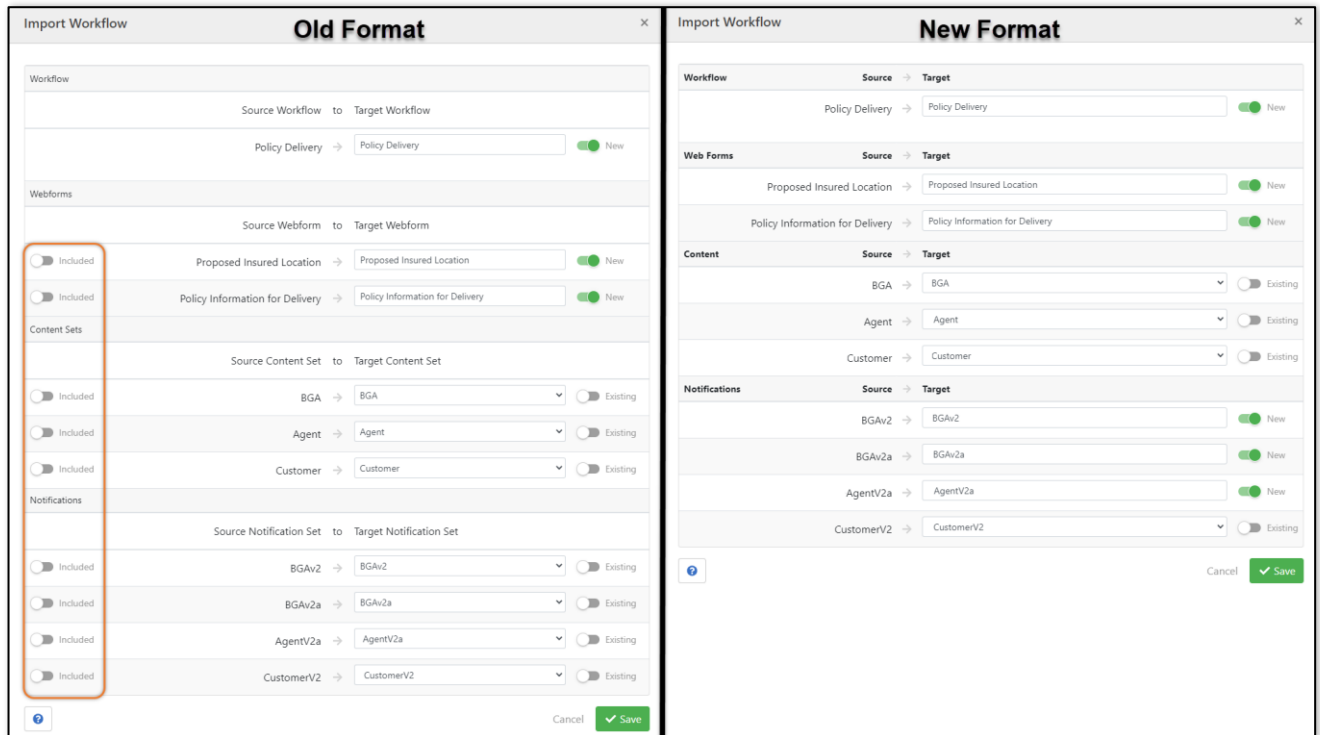
[PEP-5257] - Fixed issue where Web Form fields would not appear or disappear according to the Field Rules.

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

Release Notes



[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, Brands and Notifications for Workflow Imports. Please reference the image below for more details.



[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.

[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.

Release Notes

[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 top screenshot shows the 'Users > Bob Jones' page. It includes a sidebar with user details (Username: bjones, Full Name: Bob Jones, Email Address, Title: PM/Admin, Organization: MyCompany Inc, Group ID, Group: MyCompany, Inc.) and a main section with 'Permissions' and 'Emails' tabs. A 'Delete User' button is highlighted in red. A callout box with an orange border and text states: 'After clicking on the Delete User button, it should redirect the user to the Users page.' An orange arrow points from this button to the bottom screenshot.

The bottom screenshot shows the 'Users' page. It includes a sidebar with a search bar and a main section with a table of users. The table has columns: Username, Full Name, Email Address, Sig Image, PWD Expires, Last Login, and Options. The users listed are jsmith and bjones.

Username	Full Name	Email Address	Sig Image	PWD Expires	Last Login	Options
jsmith	John Smith			never	2022-06-06	
bjones	Bob Jones			never	2022-06-15	

[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:

John Doe

Email Address:

john.doe@example.com

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

Phone Number:

Phone Number is required for the Mobile Authentication

Start Workflow

Release Notes

v5.15.4 Release

Release Date: 8/11/2022

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 shows a transaction for 'MyCompany NDA' with ID '2000266094'. Below this, there's a section for 'PARTICIPANT: jane doe' with details like 'Participant ID: 1000180909', 'Transaction ID: 2000266094', 'Status / ID: Completed / 4', 'Full Name: jane doe', and 'Send Request via Email: false'. A table lists participants with columns for ID, Name, Email, Phone, Status, and Options. A modal window titled 'Workflow Actions for Participant ID: 1000180909' is open, showing a single workflow action: 'Define Participant' with status 'Complete'. The action details include a description, start date, and completion date. An orange arrow points from the 'View 1 Participant Workflow Action' link in the participant details to the modal window.

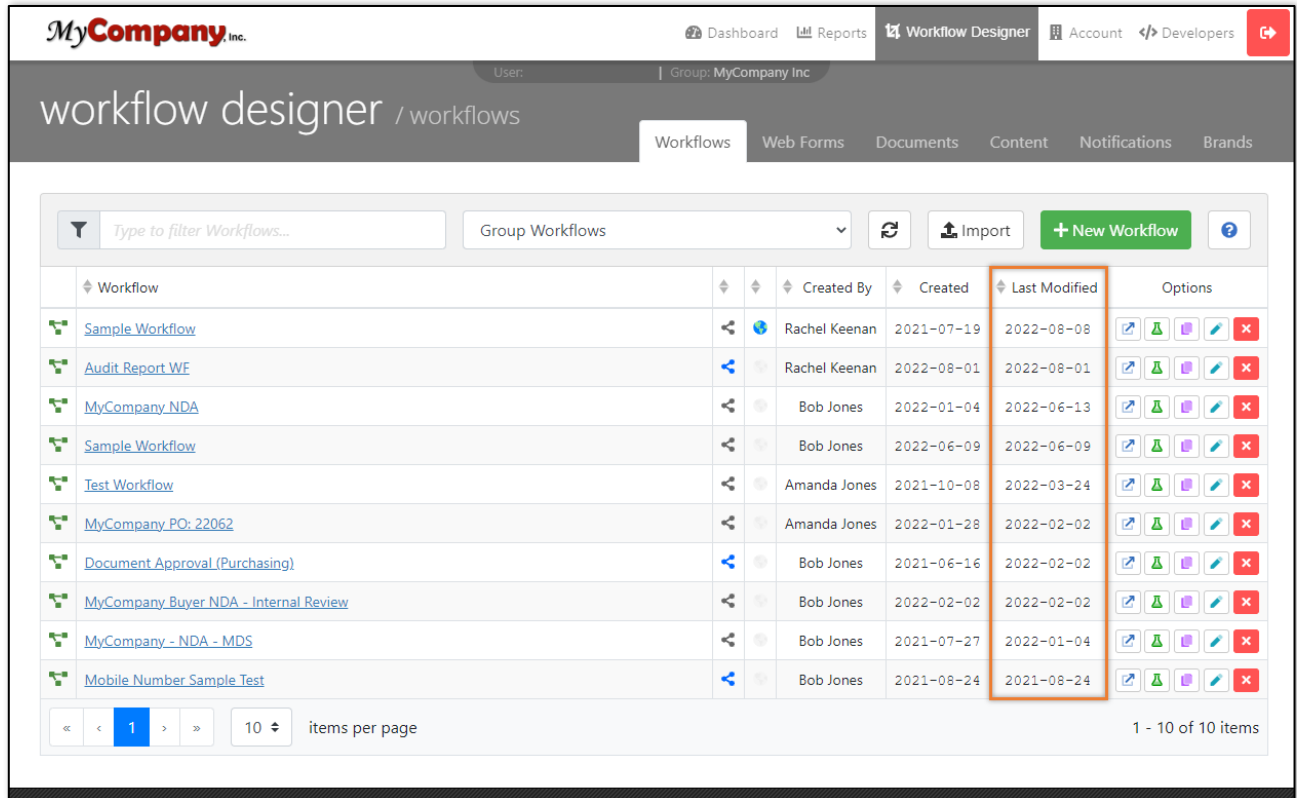
Participant ID	Full Name	Email Address	Phone Number	Status	Options
1000180909	jane doe			Completed	
1000180910	John doe	noreply@participant.defined		Completed	

Workflow Action	Type	Status	Description	Started Date	Completed Date
Define Participant	Define Participant	Complete	Define Participant	2022-06-07 07:31 PM UTC	2022-06-07 07:31 PM UTC

[PEP-5298] - Fixed issue where certain subscription events would not log failures with needed context. Added context logging for Event Queue Processing such as TransID, ParticipantID, DocumentID, and TaskID. This information will be logged back to the Event Viewer.

[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

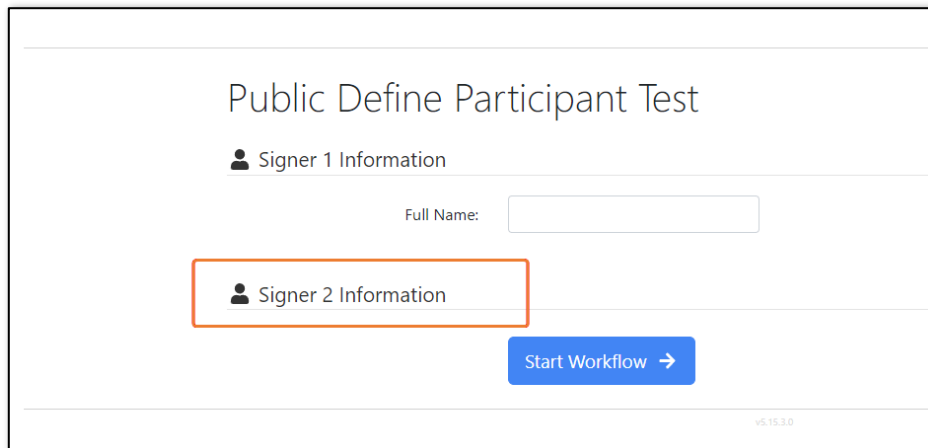


The screenshot shows the 'MyCompany Inc.' Workflow Designer interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header displays 'workflow designer / workflows'. Below this, there's a search bar and a 'Group Workflows' dropdown. The main content area is a table listing various workflows. The 'Last Modified' column is highlighted with an orange box.

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	

At the bottom of the table, there's a pagination control showing '1' items per page and '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.



The screenshot shows a form titled 'Public Define Participant Test'. It contains two sections for defining participants. The first section is 'Signer 1 Information' with a 'Full Name:' label and a text input field. The second section is 'Signer 2 Information', which is highlighted with an orange box. Below these sections is a blue button labeled 'Start Workflow →'. The version number 'v5.15.3.0' is visible in the bottom right corner.

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 Page 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

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

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 laconia, 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 feis volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.

Internal Approver Initials: _____

Signature: _____

Printed Name: _____

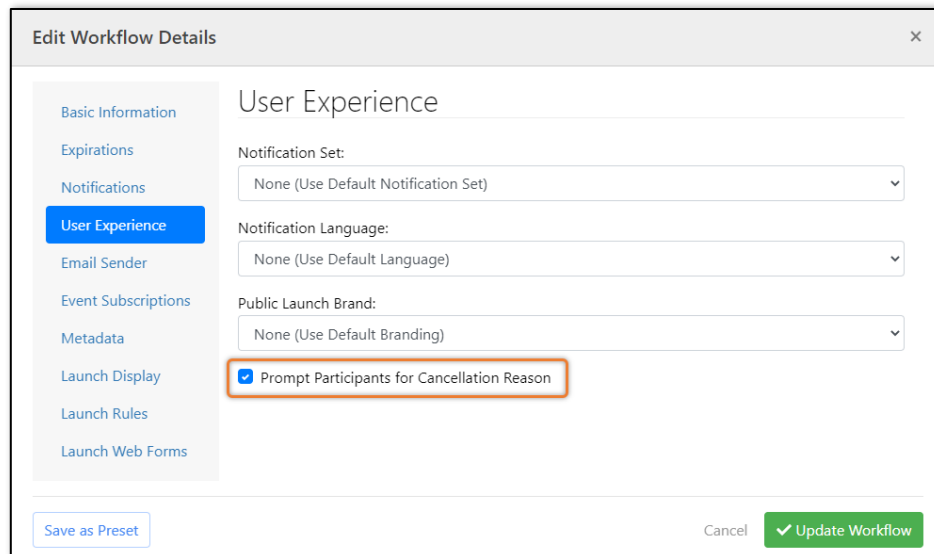
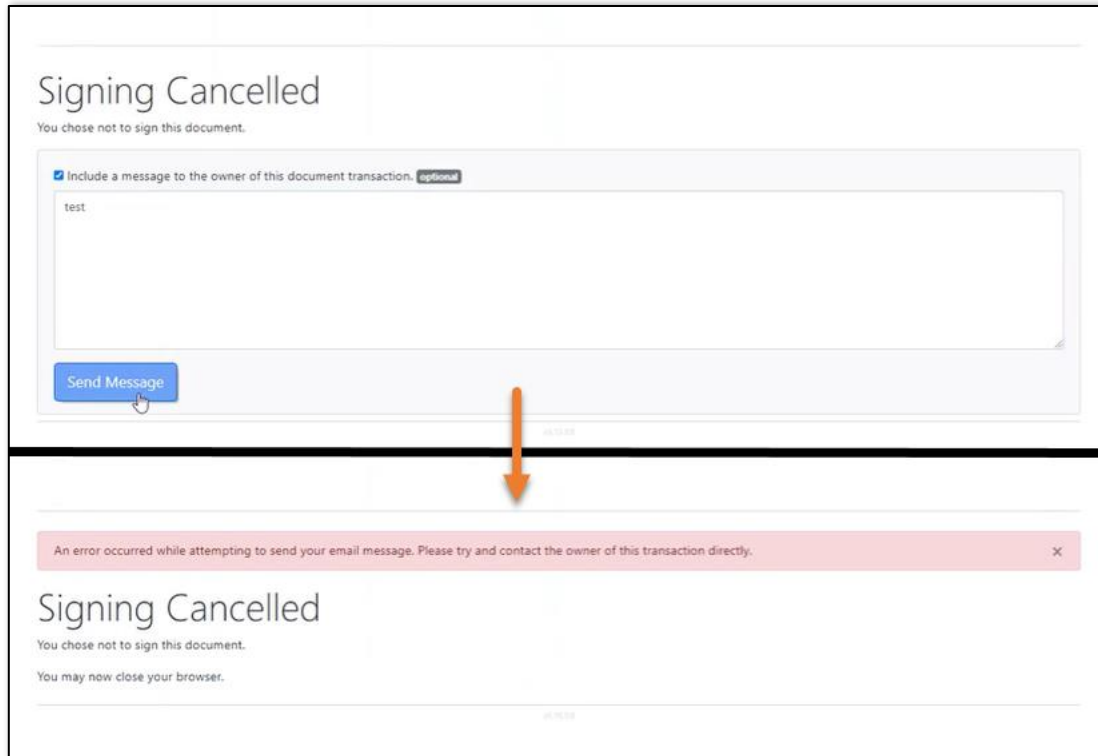
Date: _____

TEST DOCUMENT - TEST DOCUMENT - TEST DOCUMENT

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

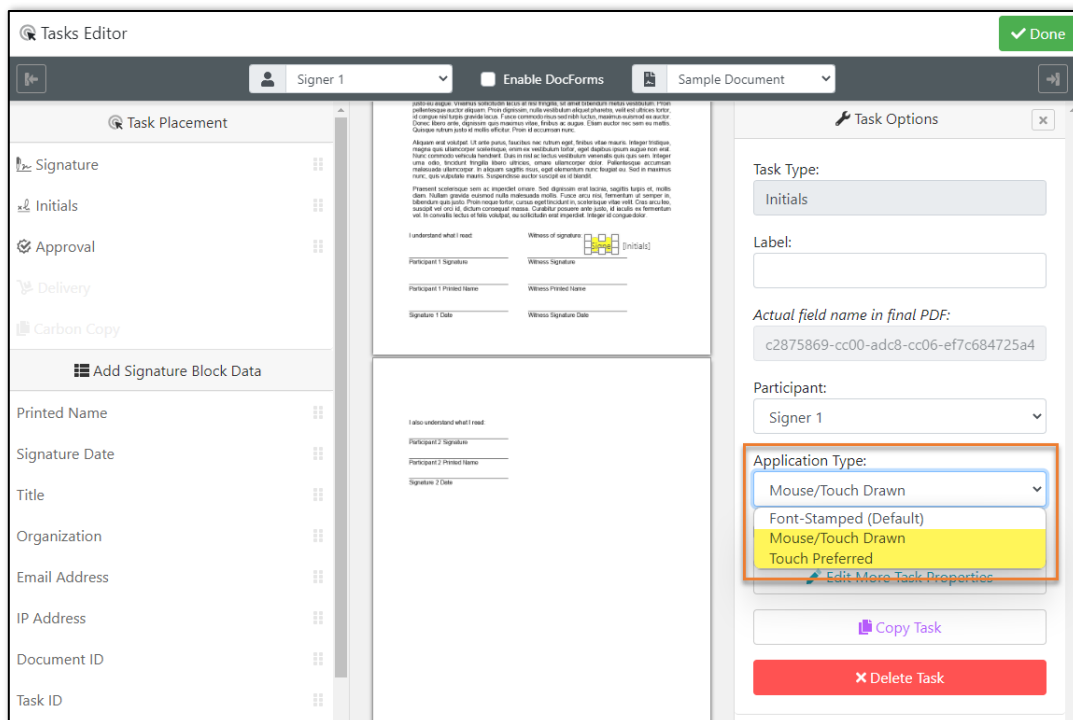
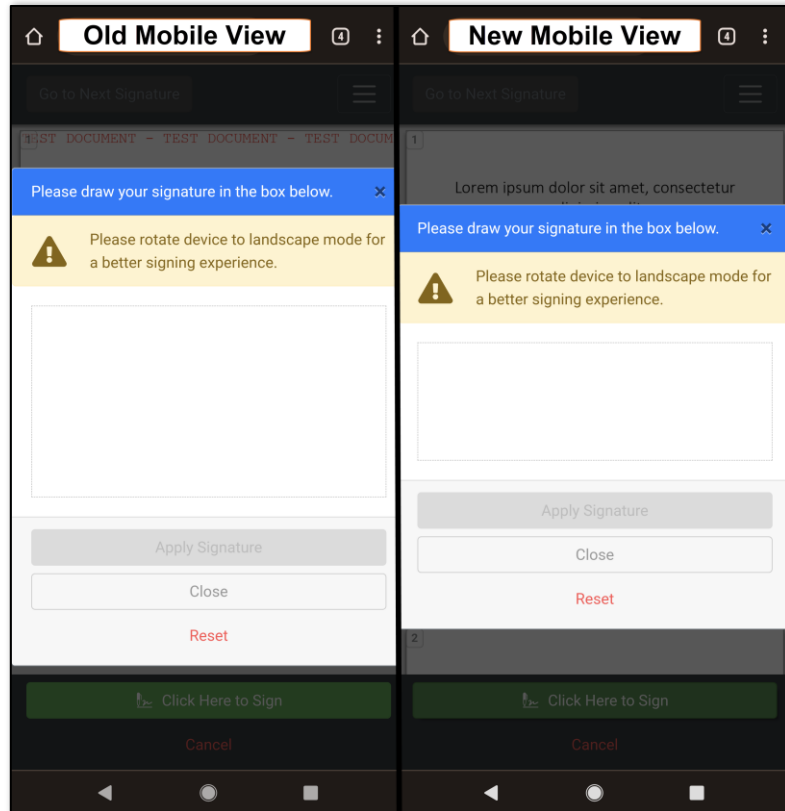
[PEP-5049] - Fixed issue where when sending a cancellation reason on the Exit Page it would show an unnecessary error message. Images of the Workflow setting, Exit Page, and error message can be seen below.

Release Notes



[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="Options"/>

+ 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

Release Date: 7/28/2022

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

Release Date: 7/18/2022

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

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

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.

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

ID	Participant ID	Full Name	Email Address	Phone Number	Status	Options
1	1000180909	jane doe			Completed	
2	1000180910	John doe	noreply@participant.defined		Completed	

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". Under "Webhook", "Email", and "SMS" radio buttons, "SMS" is selected. The "Phone Number" field contains the text "Test". To the right of this field, a red error message reads: "Enter your username in the format 'domain\user' or 'user@domain'". Below the phone number field is a "Data:" label and an empty text input field.

[PEP-4931] - Fixed issue where new installations, with no user's created, would not be able to anonymously log into the InstallationTests site. The software will allow Anonymous Login to the InstallationTests site when there's no System Admin.

[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. At the top, there's a "Label/Description" field with "test carbon" and a "Back" button. Below this is the "Participant Setup" section, which has a table with two participants: "Identifier" and "Client". The "Identifier" participant is highlighted with an orange box. Below the table are buttons for "+ Add Participant", "+ Add Me", and "+ Add Advanced". Below the "Participant Setup" section is the "Tasks Editor" section. It has a dropdown menu for "All Participants" and a "Done" button. Below this is a table of tasks. The first task, "Sig 1", is highlighted with an orange box. Below the tasks table is a "+ Add Task" button.

v5.15.1.1 Release

Release Date: 7/13/2022

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.