



Legend

Тад	Description
~API/WebServices	Represents an update or change that impacts usage of the AlphaTrust API's
~Access/Permissions	Impacts a user's access and permissions to sections of AlphaTrust.
~AuditReport	Represents an update or change that impacts usage of the AlphaTrust Audit Report.
~Authentication	Impacts additional Authentication that can be set for Participants or Workflows.
~BrandSets	Represents a change to the screen design/theme that can be customized on brand page templates.
~ContentSets	Represents a change to the screen text that can be customized on content page templates.
~ControlPanel	Represents a change to the functionality of the control panel user interface or workflow configuration via the user interface.
~Documentation	Represents an update or change that impacts the AlphaTrust documentation.
~Documents	Impacts Document processing, settings, etc.
~Emails	Impacts email notifications for basic and additional tasks for Participant or Workflows.
~EventSubscriptions	Impacts additional notifications that can be set for Participants or Workflows.
~Forms	Impacts the user experience or behaviour of DocForms or Webforms functionality.
~Groups	Impacts Groups and Group settings.
~Infrastructure	Impacts the hosting of the AlphaTrust application and /or related system dependencies including the installer.
~Installer	Impacts the installation of the AlphaTrust application.
~Integrations	Impacts integrations settings and integrations with the AlphaTrust application.
~Logging	Represents an update or change to how AlphaTrust logs errors and items related to logging.
~Metadata	Impacts Metadata settings.
~Notifications	Represents an update or change that impacts usage of the AlphaTrust Notifications.
~Reports	Impacts the audit reports, or other system generated documents and reporting.
~Security	Represents an update or change to Security related items for AlphaTrust.
~Signatures	Impacts signatures and signature settings for end users.
~Signing	Impacts the signing experience for end users.
~SMS	Represents a change to SMS functionality, notifications, and settings.
~Support	Represents a change to functionality and settings related to supporting AlphaTrust.
~Transactions	Represents an update or change that impacts Transaction settings, reporting, API calls, etc.
~UI/UX	Represents a change to the front-end portion of AlphaTrust.
~Users	Impacts Users and User settings.
~WorkflowActions	Impacts additional actions that can be set at the Participant and Task level.
~Workflows	Represents a change to the functionality of the workflow configuration via the user interface.





v5.17.2 Release

Release Date: 8/3/2023

Bug Fixes

• [PEP-7057] ~Installer

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

• [PEP-7044] ~ControlPanel ~Notifications ~UI/UX

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.

Iotification Template Edito	r			×
ubject:				
New User Setup Notification				
ody:				
Edit Insert Format Table Tools	Insert e-Sign Placeholders			
B I ⋮≡ ≔ <u>A</u> ∨ Z ∨	Custom Placeholder (API DE	FINED)		
{{ACCOUNT LOGO}}	Document List	>		
New User Setup	Email Footer			
Welcome, {{USER_FIRSTNAME}}	Launcher	>		
	Login Link			
An account had been created for you for password upon your next login.	Logo		Please click on the link below to login. You will be asked to select a new	
Login URL: {{LOGIN ACCESSLINK}}	Participant List	>		
Username: {{USER_USERNAME}}	Status Reports Link			
Password: {{USER_PASSWORD}}	Transaction	>		
(/	
DIV			POWERED BY TIN	Y /
			Cancel 🗸 Update Notification Templat	e

• [PEP-7034] ~Documents ~Workflows

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.

			🕐 Dashboard 🖢	M Reports	招 Workflow De	esigner 🛄 Account	
™ D	ocument Setup						x [№] Add Documents
Reorder	Document Title	File Name		Optional	Is Upload	Manage Tasks	Options
1	Test Document	Test Document.pdf				Z Tag Document	1 🖌 🗙
 Saving document 							
✓ Add Document(s)							
	inal Email Matification						
	Final Email Notifications						
		completed by all Participants, an email notif t to any Workflow Participants, you select th				d below using the fol	lowing
	· · · · · · · · · · · · · · · · · · ·	~					

• [PEP-7015] ~Authentication ~Integrations ~UI/UX

Fixed issue where the ADFS login page would not load correctly.

• [PEP-7013] ~Forms

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.





	Form Editor	Field 1: "Untitled" (multiline)	
workflow designer / web forms	Display	Display	Documents Content
BWeb Forms > My Untitled Form	Validation	Field Type: Multiline Textbox	Device 🗄 🛓 Export 💥 🚝
Add Fields		Label: Untitled	
Standard Fields		PDF Field Name:	
Textbox			🖉 Edit + 🗙
Multiline Textbox		Comment: Edit Insert Format Table Tools	
Checkboxes		$B I \coloneqq \underline{A} \lor \mathscr{I} \lor \mathscr{I} \Join $	
Dropdown List		Placeholder Text:	
Radio Buttons			
Dashboard Reports		Cancel 🗸 Save Changes	Support

• [PEP-7012] ~Emails ~Notifications

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.

Workflow Rules Is optic User Experience Do not	flow Rules onal (document can be skipped by Partic allow forms fields to be flattened	ipants durir	ng signing)
User Experience Do not		ipants duri	ng signing)
	allow forms fields to be flattened		
	allow forms fields to be natteried		
Event Subscriptions	as email attachment		
Metadata 🛛 🗹 Include	e Audit Report With Completed Docume	ents	
Launch Rules Document	t Retention in Days:		
Replace Document Purge do	ocument in	N/A da	ays after status is in Completed status

• [PEP-7011] ~Groups ~UI/UX ~Users

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.

Edit User		×
Basic Information	Organization	
Organization	Group: MyCompany Inc	~
	Title: PM/Admin	
	Organization: MyCompany Inc	
	Required Password Change Schedule:	•
	NEVEL	
		Cancel 🗸 Update User





• [PEP-7009] ~Workflows

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

My Company , Inc.	Ø Dashboard M Reports
	📚 MyCompany inc
workflow designer / workflows	Workflows Web Forms Documents Content Notifications Brands
Workflows > Sample Workflow	🔀 Launch 🖾 Test 💠 Export 🗮 🖊 Edi 🕞 Save
Participant Setup	

• [PEP-6987] ~Documents ~Workflows

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] ~UI/UX ~Workflows

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.

My Company . Inc.	🕐 Dashboard 🕍 Repo		/ Designer	Account	Developers 🕞			
Workflows > Sample Workflow	Save Isunch Image: Save Im							
2 Participant Setup								
Reorder Role Full Name	Email Address	In-Person	Final Email	Include Docs	Options			
I Signer 1 Full Name entered	d at Email Address entered							
2 Signer 2 Jane Doe	jdoe@mail.com							
3 Signer 3 John Smith	jsmith@mail.com							
Image: 4 Signer 4 Anne Jones	ajones@mail.com							
C Workflow Templates > Launch			Bu	ılk Launch 📱	Test 🥒 Edit			
	•							
Sample Workflow								
L Signer 1	Full Name:							
	Encil Address							
	Email Address							
		_						
	🚽 Send Workflo	w						





• [PEP-6943] ~Documents ~Transactions

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.

🕅 Tasks Editor				🗸 Done
Vendor Signer	Enable DocForms		NDA Internal Version	~ →
			🔑 Task Options	×
Lorem ipsum dolor sit amet, cons adipiscing elit	sectetur	(Task Type: Delivery Label:	
Vivanus commodo lacinia moltis. Aenean ut telus vestibutum, motostie uma eu, ta aliguam, reis sit amet pretium posuere, sopien ex elefend lacus, a pelentesque dam. Praesent imperdiet leo quis hendrerit consectetur. Phaseitus rhoncus fi blandi. Cuisque libero volti, socioregue ne caugua e, convalis consoguat motu risus imperdiet venenatis. Praesent et vestibutum leo. Nufa moncus tristique o Aenean seglitis, docti vales maximus planteral, fugita puzzi molestie justa, a maxi nuíla. Etem socierisque enim di fugita laoreet dictum sit amet quis ex. Sod foltaus sodales sed, laborits ed maximus volutaj siti amet ante nature uni utiricas. purus turps, vitae congue neque eusmod a. Sed commode odo ac felis suscipit fu polenti.	lectus velit sit amet alis at risus dictum is. Duis feugiat sod rici non vestibulum. mus sem dolor vitae isus, consectetur at Suspendisse porta		Actual field name in final PDF:	
Integer conveils, folio tempus oussend accumsen, forem norm vehicula manis, y justo en augus Varianes solitativatia lucus et nisi fingila, si and tibendum mete pellentesque auctor alquam. Pron digressem, nula vestibutum alquagi phareta, y id congue nist lurgis gravida lauce. Excess commodo reuse ed nishi luctus, maximus Donee: Been ante, dignissim quis maximus vitee, finibus ac augue. Elsim auctor Quisque nultur, justo id molis officient. Proin di accumsen nunc.	us vestibulum. Proin lit est ultrices tortor, s euismod ex auctor.		Participant: Vendor Signer	~
Alquam erat volutpat. Ut arté purus, faucitous nec rutrum eget, finibus vitae mau magna quis úlanccorper scelerisque, enim ex vestibutum tortor, eget dapibus ign Nonc commodo volvicula hordrint. Utus in nis al actocuto vestibutum venenatis qu urna odo, incidunt fingilla tibero utirces, ormare utamcorper doir. Pelle malesuada ulamcorper, in alquam sagitto suos, get dementum nunc feugiat	um augue non erat. is quis som. Integor ntesque accumsan		Edit More Task Propert	ies
nunc, quis vulputale mauris. Suspendisse auctor suscipit ex id blandit. Prasent scolarisque sem ac importido temano. Sod digressim orat lacina, sog dism. Nullem gravita e existron dulla matesuada mollis. Fusce arcun inisi, ferme bibendum quis justo. Proin neque tortor, cursus eget incidunt in, scelarisque vitae suscipit vel orci id, dictum consequiat massa. Curabitor possue and justo, to la vel la convalis lectus effeits voldapat, eu solicitudin erat imperdiet. Integer id cor	ntum ut semper in, velit. Cras arcu leo, culis ex fermentum		Clone Task X Delete Task	
Internal Approver Initials:	2			

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. o <u>https://csrc.nist.gov/publications/detail/sp/800-52/rev-2/final</u>

Bug Fixes

• [PEP-7004] ~Workflows

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.



My Company . Inc.		😗 Dar	shboard 🔟 Reports 🔽 Workflow Designer	🛱 Account 💔 Developers				
Workflows > Document(s) I need to sign		🔀 Launch 🖉 Test 💠	Export 💠 🖊 Edit 🕞 Save				
		✓ Add Document(s)						
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					
	+ A	dd Email Recipient		+ Add Me				
+ Add Email Recipient + Add Me								

• [PEP-6996] ~UI/UX ~Workflows

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.

My Company . Inc.		🕐 Dashboard	네 Reports 1것 V	Norkflow Designer	Account	Developers 🕞
		📧 📚 MyCompany, Inc.				
workflow designer	r / workflows	Workflows	Web Forms Doc	uments Conten	t Notifications	s Brands
Workflows > MyCompar	ny PO		🗹 Laur	nch 📕 Test 💠 🛃	Export	it 🖬 Save
Participant Setu		Fmail Address	In-Pe	rson Final Email	Include Docs	Options
	lame entered at launch	Email Address entered at launch				
Image: 2 Signer 2 Full N	lame entered at launch	Email Address entered at launch				 ×
	+ Add Particip		+ Add Me	+ Add Ad	vanced	

• [PEP-6994] ~API/WebServices

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

• [PEP-6973] ~WorkflowActions ~Workflows

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

• [PEP-6970] ~Installer

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





• [PEP-6660] ~API/WebServices ~ControlPanel ~Workflows

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

• [PEP-6657] ~Installer

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] ~API/WebServices

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] ~Signing ~UI/UX

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] ~UI/UX

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.

MyCompar	NY, Inc.			🕐 Dashboard	🔟 Reports 🛛 🗖 Workf	flow Designer 🛛 🖷	Account > Developers
			📧 bjones 📚 MyCo	mpany, Inc.			
dashboard	/ quick stats				Quick Stats	Workflow Templat	es Pending Signatures
				_			
My Compe	Profile Editor		+	n Dashhoard	Itil Reports 17 Workf	flow Designer 🖷	Account ≻ Developers [→</th
dashboar	Basic Information	Localization					ending Signatures
This Year	Signature Image Password Localization	Time Zone: YYYY-MM-DD MM/DD/YYYY DD/MM/YYYY YYYY-MM-DD	& Canada)		•		gnature C
ित्त Recently C	6				Cancel	✓ Update Prof	expired/voided

• [PEP-1676] ~Authentication ~ControlPanel ~Workflows

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.





My Company Edit Participant Details	Daskhoard M. Banorte 71 Workflow Datamer. Account
Workflow Workflows Partic Reorder RoyCompany.tec.	Authentication Type: One-time PIN/Password Set permanent password for this workflow Use two-factor authentic tion. Deschooard Megorts Morkflow Designer Account Op Developers Options Company, Inc. Duick Stats Workflow Templates Pending Signatures Test Company
MyCompany PO ▲ Signer 1	Full Name: Jane Doe PIN/Password: 425189376 Image: Note that the second s
Signer 2	Full Name: John Smith PIN/Password: Start Workflow →

v5.17.0.1 Release Bug Fixes Release Date: 7/5/2023

Dug Fixes

• [PEP-6953] ~Authentication ~Integrations

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



MyCompany	Bashbaard Ittl Reports 17 Workfi	low Designer		nere [+
Add Integration				×
Integration	Integration			
	 Account-Wide (shared to all other Groups and Sub-Groups if applica Integration Name: 	able)		
	Provider:	J		
	Please select one Please select one Knowledge-Based Authentication Experian PreciseID	Cancel	✓ AddIntegration	-
13 IwilioVenty	Lexis Nexis Mobile Authentication Twilio Sms Twilio Verify Email Services		V Iwilio Venty	

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

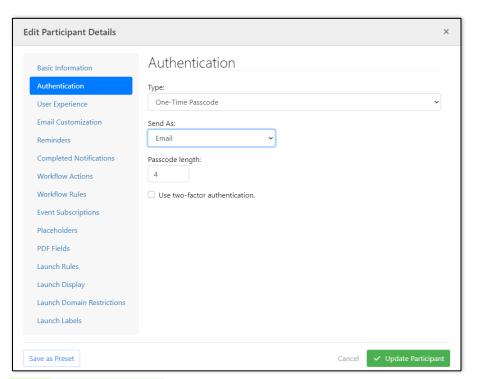
• [PEP-6538] ~API/WebServices ~Transactions ~WorkflowActions

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

- GetTaskWorkflowActionsUpdateable()
- UpdateTaskWorkflowAction()
- GetParticipantWorkflowActionsUpdateable()
- UpdateParticipantWorkflowActions()
- [PEP-5550] ~Authentication ~Notifications ~Security

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.





• [PEP-5424] ~Emails ~EventSubscriptions

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

Basic Information	Event Subscriptions	
Expirations	Subscription 1	Ø Delete
Notifications	Туре:	
User Experience	Status Changed Event	~
Email Sender	🔿 Webhook 💿 Email 🔿 SMS	
Event Subscriptions	Email Address:	
Metadata	{{PARTICIPANT_EMAILADDRESS:1}}	
Launch Display	Add Event Subscription	Show Advance
Launch Rules		

INNOVATION UNLEASHED





Improvements

• [PEP-6901] ~ControlPanel ~Reports ~UI/UX

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.

My Company . Inc.					⑦ Dashbo	ard 🔟 Reports 💈	🕻 Workflow De	signer 🖪 Account	Developers (
			13	/yCompany Inc					
dashboard / quick stats						Quick St	ats Workfl	low Templates Pendir	ig Signatures
This Year 🗸	Group Transact	ons	~	All Groups		۲ ۲	🛃 Send	l Document for e-Signati	ıre 😨
V 1	X		O pending	×	c	0/0 ancelled/closed	0	ex	6/0 pired/voided
Market Recently Created Transactions				🚏 Recently Up	dated W	orkflows Temp	ates		
Transaction ID		\$ Group	Status	Workflow Temp	late Launch				Options
1000251832 Simple Te		My Company Internal	Completed	Sample Workflow					
1000251831 Simple Test		My Company Internal	Expired	Company1 SOW					
MyCompany.mc.					🕐 Dashboa	rd 네 Reports tz	Workflow De	signer 🗒 Account	Developers (
			B \$	/lyCompany Inc					
eports / status						Status	Trends C	ompletion Rates Veri	fy Document
Q Advanced Search							🛓 Export	t Options	ed ဈ
Search For		Search Text				Status			
5 Transactions	~					Complete			~
Transaction Creator		Date Range				Date Type			
Group Transactions	~	2023-01-01 ~ 20	23-06-23		8	Created			~
Group transactions									
Search Location		Test Transactions							
	~	Test Transactions	ests		~	Q Se	arch	🔊 Reset F	ilters
Search Location			ests	\$ Group	v	Q Se Created Date		Closed Date	ilters Options

• [PEP-6643] ~Documents ~UI/UX ~Workflows

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.





🔍 Tasks I	Editor			✓ Done
₿⇒	Signer 1 - Enable DocForms	NDA JH	~	~ 1
	Praesent scelerisque sem ac imperdiet ornare. Sed dignissim erat lacinia, sagittis turpis et, molis diam. Nullam gravida euismod nulla malesuada moliis. Fusce arcu nisi, fermentum ut semper in, bibendum quis justo. Priorin neque torior, curus segettincitudint in, scelerisque vitae velt. Cras arcu leo, suscipit vel orci id, dictum consequent massa. Curabitur posuere ante justo, id iaculis ex fermentum ver inconvalis lectus et felis volopitat, eu solicitudin erat imperdiet. Integer id congue dolor. Signature: Signature: Printed Name: Date: Signature Date		▶ Task List Click to edit a Task. (Double-1 ▶ Signature	Enable Sort
		NDA JH	~	✓ Done ⊰
	Present scelerisque em ac imperdiet omare. Sed dignissim ent lacinia, sagittis turpis et, mollis diam. Nulliam gravite insimod nulla melesuada mollis. Fusce arcu nuis, formartum ut sompor in, bibendum quis justo, pin neque lortor, cursus equetincidunt in, scelerisque vite velit. Cras arcu leo, suscipt vel orci id, dictum consequet massa. Curabitur posuere ante justo, id iaculis ex fermentum vel. In convalitis lectus et felis volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.		✓ Multi-Select C Alignment: IB III IIII IIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Aatch Size: ☐ 10 10 ↓↓ ted Items

• [PEP-6554] ~ControlPanel ~UI/UX ~Workflows

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.

	Edit Participant Details		×	
workf	Basic Information	Basic Information		Brands
ST Wor	Authentication User Experience	 In-Person: (This participant will complete their actions in-person instead of via email or sms) 		at 🖉 Edit
• P	Email Customization	Role: Signer 1		
Reorde	Reminders Completed Notifications	Full Name: Full Name entered at launch		Options
	Workflow Actions Edit Participant Details		×	
workf	Basic Information	Reminders		Brands
ST Wor	Authentication	Specify the number of notifications and frequency.		st 🖋 Edit
	User Experience Email Customization	Total # of Reminders: Required		
Reorde	Reminders Completed Notifications	Reminder Frequency:		Options





• [PEP-6473] ~Documents ~Workflows

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.

vorkflow	designer / workflo	WS	Workflows Web Form:	Documents	Content No	otifications	Brands
Se Workflows	> tesat						🖊 Edit
🗜 Docur	ment Setup					≫ ¹ Add I	Documents
Document Title		File Name		Is Upload	Manage Tas	ks _0	ptions
NDA JH		NDA JH.pdf			Tag Docum	ent 🖸 🚺	×
		✓ Add Do	cument(s)			1	
_	_		Dashbaard M Rong	tz tz Workflow (Designer III	unt	
	Edit Document Detail	s				×	elopers
vorkflov	Basic Information	Basic Information				tions	Brands
😵 Workflov	Workflow Rules User Experience	Title: The uploaded	d file name will ov	erride thes	e settings.		🖋 Edit
	Event Subscriptions	File Name:					
2 Part	Metadata	NDA JH.pdf					
Role Fu	Launch Rules	File PDF File Name:				zs O	ptions
Signer 1	Replace Document	Filename + Participant Names in 'Fi	irstName LastName'		~		×
		Override file name with uploaded	file name at launch.				
						Adva	inced
	Save as Preset			Cancel 🗸 (Update Document		
	Save as riesel			Cancer	opuate Document		

• [PEP-6245] ~Access/Permissions ~ControlPanel ~Users

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.

My Compan y	, Inc.	🙆 Dashboar	rd 🔟 Reports 🗖 W	/orkflow Desigr	ner 🖪 Accou	int /> Developers
		🖽 🗟 MyCom	ipany Inc			
ccount / user	s		Groups Users	Permission	n Sets – Inte	grations Security
Type to filter U		Group Users 🗸	2 Export	Bulk E	ditors +	• Add User
Username	🗢 Full Name	Email Address	Sig Im	PWD Expires	Last Login	Options
-	Rachel Keenan	Annual Experiments		never	2023-01-03	5 • E /
-	Bob Jones	Spreadlynal con		never	2022-05-19	5 • E /
	Amanda Jones	and protection		never	2022-04-18	5 • E /
	Jane Doe	and a second second		never	never	
Users > Bulk Permissions	Editors	d				0
apply name	permissions from the list box	: you to add permissions for one or more on the left and move them to the list box using the Group selection (if available).	on the right. To find s			
-101-10-000	Art - Administration approved	Add >				*





• [PEP-6194] ~Access/Permissions ~ControlPanel ~Users

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.

My Compa i	ny, Inc.		٢	Dashboard 🔟 Rep	orts 🗹 V	/orkflow Desigr	ner 🖪 Accou	nt	opers 🕻
			8	📚 MyCor	npany Inc				
account				Groups	Users	Permissior	n Sets Inte	grations S	ecurity
Type to filte				Group Users	•	2	-	• Add User	0
Username	\$ F	ull Name	Email Addres	s	Sig Image	PWD Expires	Last Login	Optior	ıs
20	Ra	chel Keenan	-	114. CM		never	2023-01-03	3 • E	 ×
<u>bjones</u>	Во	b Jones	Spread grad			never	2022-05-19	5 • E	
	Am	anda Jones	area by rate			never	2022-04-18	• •	 ×
-	Jar	ne Doe	(the grades)			never	never		 ×
account	b Jone	es		Group	s Users	Permissio			Security lete User
User	name:	bjones							
Full 1	Name:	Bob Jones							
Email Ad	dress:	bjones@gmail.com							
🔑 Permissions 🖪		SSO Logins	🖌 Emails 🚹						
Type to filt	er Pern	nissions				R	; 🔊	+ Add Perm	hission
Account			Permiss	sion Set	\$	Open Signing	Pending Sign	natures Queue	Options
My Company Int	ernal		Administ	rator		~		/	

• [PEP-6153] ~ControlPanel ~UI/UX ~Users

Added support for displaying errors on unselected tabs in the Profile Editor. Please see the image below for an example.

Profile Editor			×
Basic Information Signature Image Password	Basic Information ^{Username:}		
Localization	First Name:	Required	
	Mobile Number:		





• [PEP-6151] ~ControlPanel ~Emails ~Notifications

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

• [PEP-6149] ~ControlPanel ~Forms ~WorkflowActions

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.

dit Participant Det	ails		×
Basic Information Authentication		Workflow Actions	
User Experience		Action 1 Type:	Lt O Delete
Email Customization		Process Explanation	~
Reminders		Action 2	Lt Delete
Completed Notificati	ions	Туре:	_
Workflow Actions		Document Review	~
Workflow Rules		Add Workflow Action	Show Advanced
Form Editor		Field 1: "Example Check List" [checkbox]	~ ×
Display Options Validation	Option 1 Label: Item 1 PDF Field N Data: Yes Default Option 2 Label: Item 2 PDF Field N Data: Yes Data: Yes Data:	ame: ame: check state check state	LT O Delete
			Cancel 🗸 Save Changes

• [PEP-6118] ~ControlPanel ~Logging

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.



		r system logs			
	ciopei.	or system logs	API Cre	edentials <i>i</i>	API Logs System Log
Ŧ			£	ال Off	Advanced 3
	Туре	Logs		📥 D	ownload Selected Logs
	APIs	REST API SOAP API Transaction API Control Panel API Sign API Events A Installation Tests API CAPICOM API	PI		🎗 Hide Log Files
	Services	Cleanup Process Service Cleanup Queue Service COM Bridge Service Digital Signature Document Service QueuedEvents Process Service Queued Events Queue Service Bulk Transactions Create Service Bulk Transactions Process Service Bulk Transactions Service Status Updates	Service duler Service		Delete All Logs Auto Disable Logging
	Cloud/Lambda	Render Images			
	Legacy	API Document Processing Database/Utility Status Event Service			
	Other	Debug			
	1	IOTE: Changes to the system log settings may take up to one minute to go into effect and it will or You can also hide the log files listed below while logging is enabled if you use Splunk (or son			e days.
	Log File Nar	ie	Server	File Size	e 🔶 Last Modified Date
_					

• [PEP-6026] ~ControlPanel ~Documents ~UI/UX

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.

workflow designe	C / documents	Workflows Web Forms Documents Content Notifications E	Brands
Type to filter Documents		Image: Contract of the second seco	0
Document Name		♦ File Size ♦ Last Modified Op	otions
New Patient Form,pdf		157.12 KB 2023-06-05 🗐	2 ×
MyComp 1ny. Inc.		🐼 Dashboard 坦 Reports 1컵 Workflow Designer 😭 Account Provide</th <th>pers 🕞</th>	pers 🕞
workflow designe	r / documents	Workflows Web Forms Documents Content Notifications a	Brands
Documents > New_Patier	it_Form.pdf	🕲 Optimize 💉 Flatten 🔢 坐 Export 🔢 🧭 Rename 🛙	Save
🖺 Add Form Fields	*	Field Properties	→
AB Textbox		New Patient Form	
Checkbox		Date: [Date] Full Name: [Pull Name] Phone: [Ptone]	
Radio Buttons		Address: Marriel Cover 10 Cove	
Drop-Down List		Employ Now, Adves, R Proce. [In Contractions of International Contraction of Contract,	
Multiline Textbox		Have you seen a Chirspascia federe? Yee No Ware? Internal When dayse find the problem? What is your major compliant?	
		mere da you tea the produced: "That is your major companie:	
		Please indicate from the because of 🐘 An on the job injury 💼 An uncle accident 💼 A home injury	
		Date of highy Disturbing Insurance Company, Insurance Company, Insurance Company, According of the Addems of graph (Instrum Accord and and accord and accord and accord ac	
		Here you are Malary The Type of Acoine: Devolve hype fully, what accidents or major injurina? You Devolve hype The Devo	





• [PEP-6025] ~UI/UX ~Workflows

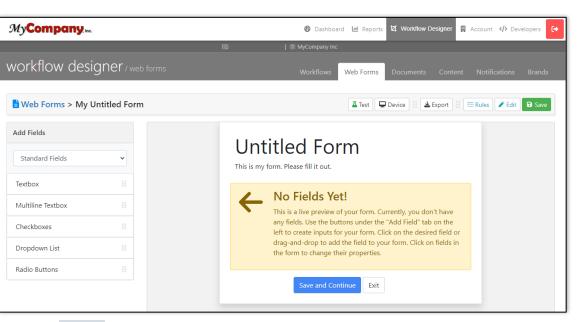
Updated the UI for Workflow Setup, Content, Notifications, Web Forms, and Brand pages to be more consistent with other new UI updates. Please see the image below for more details.

MyCompany, Inc.	🕜 Dashboard 낻 Reports 🔀 Workflow Designer 📮 Account 🌾 Developers 🕞
workflow designer/workflows	Workflows Web Forms Documents Content Notifications Brands
St Workflows > Test	🗄 🛃 Export 🗄 🖍 Edit 🖬 Save
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
workflow designer/web forms	Workflows Web Forms Documents Content Notifications Brands
Web Forms > My Untitled Form	Test Device 💠 Export 👯 🖾 Rules 🖌 Edit 🕞 Save
Add Fields	Untitled Form
Standard Fields	This is my form. Please fill it out.
workflow designer / content	Workflows Web Forms Documents Content Notifications Brands
Content > MyCompanyInternal	🛓 Export 💠 🗹 Rename
Supported Languages + Add Language	Content Page Template Last Modified Options
	C 🖬 Access Denied
English	C 🖬 Authentication (Common)
workflow designer / notifications	Workflows Web Forms Documents Content Notifications Brands
* Notifications > MyCompanyInternal	🛓 Export 💠 😂 Rename
Supported Languages + Add Language	🖻 Email Templates 🧕 👳 SMS Templates
	Notification Template Last Modified Options
English	Image: Construction 2022-04-07
workflow designer / brands	Workflows Web Forms Documents Content Notifications Brands
Stands > MyCompanyInternal	🛓 Export 💠 😂 Rename
	Brand Page Type Template Last Modified Options
Select the checkbox of one or more Brand Page Types from the list to allow edit initialization.	Image: Common CSS
	DocForms UI

• [PEP-5974] ~Forms ~UI/UX

Redesigned the Web Forms page for more consistent UI across the platform. Please see the image below for more details.





• [PEP-5933] ~Signing

Removed the old Signing UI from the ProntoConfig.ini. The new Singing 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] ~ControlPanel ~Infrastructure

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.

	AlphaTrust Configuration	×
	File	
	Save Copy Update the AlphaTrust system configuration JSON file in the editor below and click the Save button to commit the changes.	
Desktop App AlphaTust e-Sign Configuratio n	Transformer Trans	

• [PEP-5826] ~Infrastructure ~Installer

Moved the stats update from the SQL update script to a separate optional script.

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Bug Fixes

• [PEP-6906] ~Authentication ~Metadata ~Signing

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.

Basic Information	Authentication		
Authentication	Туре:		
User Experience	Knowledge-Based (KBA)		~
Email Customization	Config Settings:		
Reminders			
Completed Notifications	Use two-factor authentication.		
Workflow Actions			
Workflow Rules			
Event Subscriptions			
Placeholders			
PDF Fields			
Launch Rules			
Launch Display			
Launch Domain Restrictions			
Launch Labels			
ve as Preset		Cancel 🗸 Upda	te Participant

MyCompany. Inc.		n Dachhaard III Renarts 17 Workflow De	eigner 🛱	Account > Develo	opers 🕞
Add Integration		×			
	Integration		Perm	nission Sets Integ	grations
Type to filter Integrations	Account-Wide (shared to all other Groups and Sub-Groups if appli Integration Name:	cable)		+ Add Integration	0
ID Integration Name		Required	Active	\$ Туре	Options
*\$	Provider:		~	Windows ADFS	
	Please select one	•	~	Microsoft Azure AD	
	Please select one		~	Experian Precise ID	
-46	SSO Authentication Windows Active Directory Federated Services (ADFS)	Cancel 🗸 AddIntegration	~	Lexis Nexis	
* -	Microsoft Azure AD Okta		~	Okta	
*	Knowledge-Based Authentication		~	SendGrid	
45	Experian PreciseID Lexis Nexis		~	Twilio SMS	

• [PEP-6759] "BrandSets "Documents "Forms "Notifications "UI/UX

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.



MyCompany, Inc.	83	Dashboard	H Reports 법	Workflow Designe	r 🔟 Account	
workflow designer / web forms	User: Group: MyCompany		eb Forms Do	ocuments Con	atent Notifica	tions Brands
Type to filter Web Forms	oup Web Forms		۰ C	t Import	+ Add Web	Form
♦ Web Form ♦ Tem	nplate Name 🔶	Created By	\$ Group	Created	Last Modified	Options
Applicant Information	<	Bob Jones	MyCompany, Ir	nc. 2021-03-01	2023-05-17	A 🛯 🖊 🗙
My Company ™	a di seconda di s	Dashboard	IM Reports 17		r 🔣 Account	A Developers
workflow desic				×		
	form from a different server, it mus	t be an export	t from a server c	of the Lon	itent Notifica	tions Brands
Type to filter Web Forms	Select Web Forms to up	load		rt	+ Add Web	Form

• [PEP-6752] "BrandSets "Documents" "Notifications "UI/UX

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.

MyCompany. Inc.			🕐 Dashboard 🔟 Reports	12 Workflow Designer	Account
			MyCompany Inc		
workflow design	Ner / notifications		Workflows Web Forms	Documents Content	Notifications Brands
* Notifications > MyCe	ompany Test				LExport II Carame
Supported Languages	+ Add Language	😫 Email Templates 💈	🗭 SMS Templates 🚹		
		Notification Template			Last Modified Options
English	`	Registered User: Welcor	ne Notification		
	Switch Group			×	
workflow desig	Select Group or type to	filter		Show Master ID	Notifications Brands
	My Company Interna			•	
* Notifications > My	0		Cancel	✓ Switch Group	🛓 Export 🧮 🕑 Rename
			My Company Internal		
workflow design	Ner / notifications	7	Workflows Web Forms	Documents Content	Notifications Brands
Type to filter Notification				2 1mport +	- Add Notification
Notification Template Set Na	ame			\$ La	ast Modified Options
* Notification Test				20	22-03-23 📑 🖻 🗙

• [PEP-6751] ~Logging ~Signing

Fixed issue where the content security policy would block log rocket from consistently recording.





• [PEP-6703] ~Authentication ~Signing ~WorkflowActions

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.

Ec	dit Participant Details				×	
Workflow Workflo Label/Pescription MyCompany PO	dit Participant Details Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Actions dit Participant Details	Authentication Type: One-time PIN/Password Set permanent password for th Password: Use two-factor authentication.		Action that would	, , , , , , , , , , , , , , , , , , ,	ications Brands
Workflo Label/Description MyCompany PO	Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Actions	Workflow Actions Action 1 Type: Federal Consumer Disclosure e- Add Workflow Action		elled incorrectly.	O Delete	ications Brands
	ransaction Details: Partic	ripants Transactio		ents Participants Emu		
MyCompany	у РО	Workflow	Action is in a	a Cancelled status.		Cancel Transaction
	Participant ID: 1000559619 Transaction ID: Status / ID: Pending / 2		Participant ID Full I 1000559619 Jane	Name Email Address Doe	Phone Number	Status Options Pending
My Company reports / statu	SL	ons for Participant ID: 100055 RKFLOW ACTION IN THIS Participa		M Roperts 17 Workflow D	Audit Repor	t 🌵 Developers 🕑
Q Search Results > Tr	y PO	CTION: Consumer Disclosure Agreement Consumer Disclosure Agreement Cancelled 2023-06-28 06:23 PM UTC			B	380
		2023-06-28 06:23 PM UTC				Cancel Transaction

• [PEP-6669] ~WorkflowActions

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.





Edit Participant Details			×
Basic Information	Workflow Actions		
Authentication	Action 1	↓† 🔕 Delete	
User Experience	Туре:		
Email Customization	Define Another Participant	~	
Reminders	Participant to Define:		
Completed Notifications	Signer 2 🗸		
Workflow Actions	✓ Full Name ∧ options		
Workflow Rules	Custom Field Label:		
Event Subscriptions	You can customize this field's label for the Defining Participant.		
Placeholders	Required		
PDF Fields	Prepopulate		
Launch Rules	Read-Only		
Launch Display	Email Address		
Launch Domain Restrictions	Phone Number Title		
Launch Labels	Organization Authentication		
	Two-Factor Authentication		
	Custom Email Message		
	Customize Page Content		
	Add Workflow Action	Show Advanced	i

• [PEP-6667] ~Infrastructure

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] ~Notifications ~Workflows

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.

Edit Workflow Details		×
Basic Information	Notifications	
Expirations Notifications	Send "Complete" notification Send "Cancel" notification Send "Expled" notification	
User Experience Email Sender	Include documents as attachments Launcher Notification:	
Event Subscriptions Metadata	None	~
Launch Display Launch Rules	Notification 1	Delete
Launch Web Forms	Email Address:	
	Add Placeholder Value	
	Add Final trification	
	Placeholder Values: Placeholder Name Placeholder Name Placeholder Value	×
	Add Placeholder Value	
	Add Final Notification	





• [PEP-6564] ~UI/UX ~Workflows

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.

М	y Company . Inc.		🕐 Dashboard	uu Re	ports	te	4 Workflow Des	signer 🖪 Accou	int 🌾 Developers 🕞
		60	MyCompany Inc						
W	orkflow designer / workflows		Workflows W	eb Foi	ms	۵	Oocuments	Content No	tifications Brands
	▼ Type to filter Workflows	My Workflows			~		2 1mp	port + New	Workflow 3
	\$ Workflow			¢	÷	¢	Created	Last Modified	Options
4	Sample Workflow				4		2022-04-19	2023-06-21	
Υ.	Company1 SOW			Ø			2022-06-09	2022-06-09	

• [PEP-6561] ~Workflows

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.

M	y Company .inc.	🕐 Dashb	oard	🔟 Reports 🕻	4 Workflow Des	signer 🛱 Accou	nt Developers
	œ	🏽 MyCompa	any In	2			
V (orkflow designer/workflows	Workflows		Web Forms [Documents	Content Not	tifications Brands
•	Type to filter Workflows Group Workf	lows		~	2 1mp	oort + New	Workflow 3
	\$ Workflow	\$	\$	Created By	Created	Last Modified	Options
4	Customer NDA	<	: 6	jdoe	2023-06-21	2023-06-21	
4	Sample Workflow	<	: 6	Bob Jones	2022-04-19	2023-06-21	
	Privacy Policy	<		Pachal Kaapan	2022-09-13	2023-05-01	

• [PEP-6559] ~Authentication ~ControlPanel ~Signing ~Users

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.





Edit User	×	Edit User	
Basic Information	Basic Information	Basic Information	Group Permissions
Organization	Username:	Organization	Permission 1
Permissions	speed ppelos con	Permissions	Group:
SSO Logins	First Name:	SSO Logins	MyCompany, Inc.
	Rachel		Permission Set:
	Last Name:		Administrator 🗸
	Keenan		Allow Open Signing
	Email Address:		✓ Allow Open Signing Queue
	Number of pagebox cont		Permission 2
	System-Wide Admin		
	C Account-Wide Admin		Group: My Company
	Allow Installation Tests Access		Permission Set:
			Permission Set:

dit Participant Details	×
Basic Information	Authentication
Authentication	Туре:
User Experience	Registered User 🗸
Email Customization	Allow Launcher to choose Registered User.
Reminders	User:
Completed Notifications	Any Registered User 🗸
Workflow Actions	Use two-factor authentication.
Workflow Rules	
Event Subscriptions	
Placeholders	
PDF Fields	
Launch Rules	
Launch Display	
Launch Domains	

М	ly Compa	NY. Inc.			£ 26 D)ashboard	≝ Reports 1	🛿 Workflo	w Designer	Accour	it > Deve	lopers 🕞
d	ashboa	ard / pending signature	25	User:	Group: MyCompany, Ind		ick Stats	Workflow	Templates	Launch	Pending Sig	gnatures
	T Type to filte				Include All Grou	ips 🗌 Shoi	w Test Transa	actions	8 🔹	Auto-Sign	Selected	0
	Transaction ID	Transaction Description MyCompany PO	Participant ID	Name		🗢 Email		4	Auth Typ		quested By ompany, Inc.	Sign

• [PEP-6558] ~Authentication ~ControlPanel ~Signing ~Users

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.



Edit Permission		×
Group Permissions	Group Permissions Group: My Company Internal Permission Set: Administrator Allow Pending Signatures Queue Allow Open Signing (not recommended) This will allow this user to sign as any Participant that uses the Registered User authentication and that has not assigned a specific user.	
	Cancel 🗸 Update Permiss	ion

• [PEP-6371] ~ControlPanel ~Documents ~Workflows

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

My Company	🚳 Dashboard 🔟 Report	s 14 Workflow Designer 🛛 Account 🌾 Developers 🕞
Document Setup		* Add Documents
Document Title	File Name	Is Upload Manage Tasks Options
MyCompany NDA	MyCompany_NDA.pdf	Tag Document 🚺 💉 🗙
	✓ Add Document(s)	
dashboard / workflow templates	launch Quick puts	Workflow Templates Launch Pending Signatures
MyCompany PO		← Back 刘 Single Launch 👗 Test 🧨 Edit
MyCompany NDA		
Upload Document:	Browse for file	
Dpload CSV File		
Upload CSV:	Browse for file	
±	Send Bulk Launch	

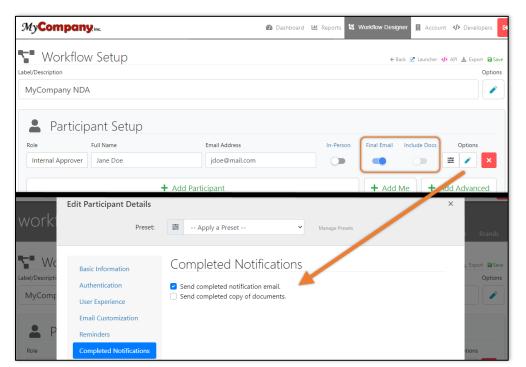
• [PEP-6231] ~UI/UX ~Users

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

• [PEP-6218] ~UI/UX ~Workflows

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] ~Authentication ~Workflows

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.

Basic Information	Authentication	
Authentication	Туре:	
User Experience	One-Time Passcode	
Email Customization	Send As:	
Reminders	Sms 🗸	
Completed Notifications	Passcode length:	
Workflow Actions	4	
Workflow Rules	Integration Name:	
Event Subscriptions	TwillioCreds 🗸	
Placeholders	Set permanent phone number for this workflow	
PDF Fields	Send to mobile phone number:	۱ I
Launch Rules	//1234567890 Phone number is not valid	
Launch Display	Number of phone number characters to leave unmasked:	
Launch Domain Restrictions	4	
Launch Labels	Save the raw response? No Use two-factor authentication.	

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v5.16.8 Release

Release Date: 7/12/2023

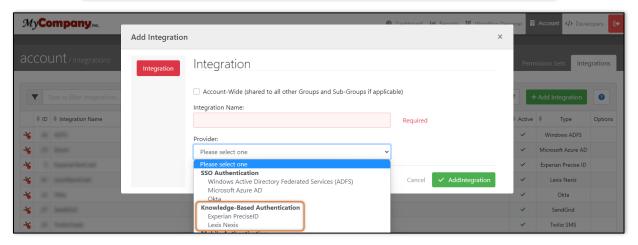
Bug Fixes

•

[PEP-6906] ~Authentication ~Metadata ~Signing

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.

Basic Information	Authentication	
Authentication	Туре:	
User Experience	Knowledge-Based (KBA)	~
Email Customization	Config Settings:	
Reminders		
Completed Notifications	Use two-factor authentication.	
Workflow Actions		
Workflow Rules		
Event Subscriptions		
Placeholders		
PDF Fields		
Launch Rules		
Launch Display		
Launch Domain Restrictions		
Launch Labels		



v5.16.7 Release **Bug Fixes**

Release Date: 6/1/2023





• [PEP-6728] ~Notifications ~UI/UX ~Workflows

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.

My Company . Inc.				Reports 🕼 Workflow Designer 🗒 Account 🍫 Developers
lashboard / quick st	ats	User: Group: My	Company, Inc.	k Stats Workflow Templates Launch Pending Signature
This Year	Group Transact	tions		 ✓ Ø Send Document for e-Signature
V 23	Z	12 Pending	Can	
vorkflow designe	e r / workflow	/S	Workflows Web	ns Documents Content Notifications Branc
Sign & Send	0	Send for Signature	0	Create a Template
I need to sign docume then send them to a recipients.		I need to send out do to others to sign and s back to me.		I want to create a re-useable Workflow template that can be launched multiple times.
Final Email Notifie	cations			
		by all Participants, an email noting fion will icipants, you select that option in the Partici		ddresses entered below using the following settings. If bove.
Send If Completed	Cend If Can	celled Celled Send If Expired	C Atta	ch Signed Documents 🦳 🌉 Attach Uploaded Document:
Full Name		Email Address	iom.	
Jane Doe		Juceemail		

• [PEP-6722] ~ControlPanel ~Signing

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] ~Logging

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 Bug Fixes

Release Date: 5/18/2023

• [PEP-6702] ~Forms ~UI/UX

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.





🗎 Web Form Editor		Save V Done
Add Field Field Settings Form Settings Standard Fields III Textbox III Multiline Textbox III Checkboxes III Dropdown List III Radio Buttons III	Untitled Form This is my form. Please fill it out. Untitled Check Item 1 List Item 2 Item 3 Save and Continue Exit	
🖹 Web Form Editor		Save V Done
Add Field Field Settings Form Settings Field Type: Checkboxes Label: Untitled Check List	This is my form. Please fill it out. Untitled Check Item 1 List: Item 2 Item 3	
Edit Field Options	Save and Continue Exit	
Comment: Label: Label: Item 2 PDF Field Name: Checkboxes Label: Item 2 PDF Field Name: Data: Yes Default check state Add Option		ve V Done
Comment:	Cancel 🗸 Save Changes	

• [PEP-6701] ~API/WebServices

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] ~WorkflowActions

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.





E-Sigr	nature Proce	ess Explanation		
-	reeing to sign your document or		permit you to review your document and sign or	nline with a legally valid
This process cons	sists of the following steps:			
• Test C • Addit	t:MyCompany NDA Completion Web Form tional Document Upload y your Electronic Signature to the	document		
You will have a ch	hance to review the final docume	nt and then apply your electronic signature	e. You will be able to download a signed copy of	the agreement after signing.
	Edit Participant Details			×
work	Preset:	🚔 Apply a Preset	 Manage Presets 	s Brands
Label/Description	Basic Information	Workflow Actions		Export Save
Docume	Authentication	Action 1	• c	Delete
	User Experience Email Customization	Type:		
P	Reminders	Process Explanation	0.11	
Role	Completed Notifications	Add Workflow Action	Show Ad	tions
Signer 1	Workflow Actions			

• [PEP-6685] ~Workflows

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				✓ Done
k	2	igner 1 👻 🗖 Enable DocForms 📱 New Patient Form 1	~	*
🛞 Task Placement	*		Task List 🗸	Enable Sort
<u>₿⊷</u> Signature		Signer 1 (Signature) New Patient Form	Click to edit a Task. (Double-	click for all properties)
<u>×ℓ</u> Initials		Dite: Full Name: Phone:	<u>I</u> ₂₂ Signature	1
😵 Approval		Dite of Birth Gender: Email: Address: City: State: Zip:	🎾 Delivery	1
₩ Delivery		Employer Name, Address, & Phone. MyCompany Inc, 1234 Company Steet, 890-123-4567 Do you have balth inurance? Yes D No Yyes, please give company name, address, & please below:		
📕 Carbon Copy		De you name maan in maananke 🗋 in s 📄 ng 🦷 y ng peneng gen canpag y name, analon a penen kanon. Hene you seen s Chiropeactor before? 🔄 Yos 📄 No 🛛 Whene?		

• [PEP-6681] ~Emails ~Transactions

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.



му Со	mpany.inc.	🕜 Dashboard 🔟 Repo	orts 🙀 Workflow	Designer 📕 Ac	count 🌾 Developers
еро	user rts / status) Group: MyCompany, Inc. Transaction Documents P	articipants Er	nails Audit R	eport Event History
0					
Q Searc	h Results > Transaction Details: Emails				
	th Results > Iransaction Details: Emails Flexible Spending Acct. Reimbursement - Jane Doe 1000591707				Void Transaction
	Flexible Spending Acct. Reimbursement - Jane Doe	Failed Event Reason	\$ То \$	Participant ID 🗘	Void Transaction
	Flexible Spending Acct. Reimbursement - Jane Doe 1000591707	Failed Event Reason	↓ To ↓ jdoe@mail.com	Participant ID 🖨	Void Transaction
Status 🔶	Flexible Spending Acct. Reimbursement - Jane Doe 1000591707 Subject	Failed Event Reason		Participant ID 🔷	Void Transaction

v5.16.5 Release **Bug Fixes**

Release Date: 5/4/2023

[PEP-6637] ~API/WebServices ~Documents •

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] ~Signing •

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.

🙆 Dashboard 🛛 🛄 Reports 17 Workflow Des Account </> Document Setup Add Docur Document Title File Name Optional Is Upload Manage Tasks Options Test Document Test Document.pdf Tag Document 2 1 Blank Template Blank Template Tag Document 1 Add Document(s m Tasks Editor 🗸 Don All Participants Blank Template 4 ≁ Tasks Label Task Type Placeholder Type Placeholder/Position Participant Options Signature 🗸 Search Text Search All Pages Sig 1 ∧ Manage Data 0 sig1 Signer + Add Signature Block Data Placement Basic Information User Experience Placement Type: Text Placeholder ~ Style Placement Placeholder Text: × Workflow Actions sig1

v5.16.4 Release

Release Date: 4/20/2023

Offset Start Position:

✓ OR Right

Bug Fixes

[PEP-6594] ~Security ~Signing ٠

Event Subscriptions

Launch

Page(s) to Search: All Pages

Offset Start Position:

Horizontal Offset:

Instance:

Left

AlphaTrust

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] ~Logging •

Fixed issue where that can show up in Event Viewer under certain scenarios: Document integrity check failed for DocumentID = ######### on SignatureID = ######### Document cannot be processed further - fatal error (SignDoc2-primary).

[PEP-6572] ~Documents ~Signatures •

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.

~



y Cor	mpany, Inc.				🙆 Dashboa	rd 🔟 Reports	12 Workflow D	Designer 🛄 Account	
	Document Se	tup							ォ ^ト Add Documer
Reorder	Document Title		File Nar	me		Optional	Is Upload	Manage Tasks	Options
1	1 MyCompany NDA MyCompa			ompany_NDA.pdf				🛃 Tag Document 🛛	3 🖌 🚺
1 2	2 Blank Template Blank Template				•	🗹 Tag Document 1] 🗸 🖡		
✓ Add Document(s)									
v Cor	moanu				Dashboa	rd III Paparts	12 Workflow F	iner III. Account	
	mpany. _{inc.} is Editor		_		🚯 Dashboa	rd - ᄖᅼ Reports	包, Workflow D	ner 🛛 Account	 Developer Done
		All F	Participants	 Enable Doct 		rd 낸 Reports ank Template	12 WorkTiow E	cer 🛛 Account	
	is Editor	L All F	Participants	v 🔹 eee be			_	CIET 🔝 Account	
20- 1	is Editor	All F	Participants Placeholder Type		corros 🖪 Bi		_	Cet Account	
n Tasks	s Editor Tasks		Placeholder Type		corros 🖪 Bi		✓		V Done

• [PEP-6569] ~Documents ~Workflows

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.

Edit Form Field Details	×	✓ Done
Basic Information	Style	→1 ✓ Field Options
Style Placement	Font Color: Black Font Size: O pt Leave blank for "Auto-Size" Alignment: Multiline Hidden Read-Only Locked	Field Type: Textbox Participant: (field access) Any Participant Field Name: Employer Name Address Phone Initial Value: MyCompany Inc, 1234 Company Street, & Multiline Required field More Field Properties
1	ake sure you fill out all of the form fields and then click the "Save & Continue" button. ST DOCUMENT – TEST DOCUMENT – T New Pat Date:	Save & Continue → TEST DOCUMI tient Form
	Date of Birth: Gender: Read-Only Address: City: State: Employer Name, Address, & Phone: MyCompany Inc, 1234 Company Street	Zip: t, 890-123-45





• [PEP-6567] ~Security ~Integrations

Removed X-Frame-Options from Sign App as it is not required.

• [PEP-6560] ~API/WebServices ~Signing ~Workflows

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.

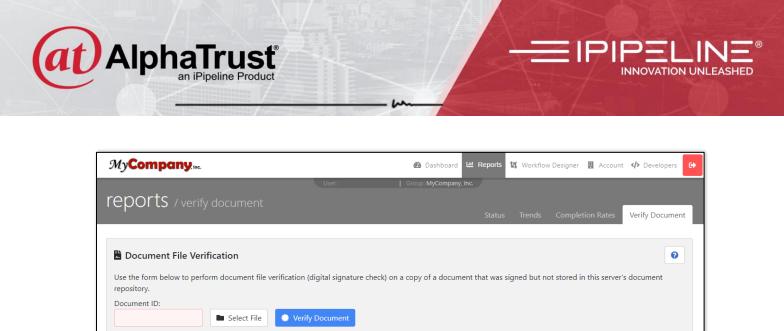
Image: Super 1 Index Decement Les Signature Image: Signature Image: Signature Signature Image: Signature <td< th=""><th>Tasks Editor</th><th></th><th>🗸 Done</th></td<>	Tasks Editor		🗸 Done
Initials II A perroval III Delivery IIII Carbon Copy IIII Delivery IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Le Signer	1 Cinable DocForms 🕒 MyCompany NDA - Copy 🗸	+
Approval Belivery Belivery	l Signature II		
Edit Participant Details Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Rules Porkflow Rules Porkfl	Approval Delivery Carbon Copy		
Authentication Custom Exit Url: User Experience https://www.mydomain.com/mycustomexitpage/ Email Customization Allow participant to reassign tasks to a different person if necessary. Reminders Verify/Query for: Completed Notifications Full Name Workflow Rules Email Address Placeholders Organization PDF Fields Courment Access Window: Launch Rules Ominutes after completed Launch Display Allow Participant to access Launch Domains Image: Completed Notification in the state of the state o		×	
	AuthenticationUser ExperienceEmail CustomizationRemindersCompleted NotificationsWorkflow ActionsWorkflow RulesEvent SubscriptionsPlaceholdersPDF FieldsLaunch RulesLaunch DisplayLaunch Domains	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:	

v5.16.3 Release Bug Fixes

Release Date: 4/6/2023

• [PEP-6495] ~Documents

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] ~Signing

Fixed issue where accessing license information was causing an "Index was outside the bounds of the array" error.

• [PEP-6480] ~Workflows

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.

Edit Workflow Details		×
Basic Information	Expirations	
Expirations	Transaction Expiration:	
Notifications	3 weeks ~	
User Experience	Session Expiration:	
Email Sender	15 minutes (Leave blank for default)	
Event Subscriptions		
Metadata		
Launch Display		
Launch Rules		
Launch Web Forms		
Save as Preset	Cancel 🗸 Update W	/orkflow

• [PEP-6302] ~Documents ~Forms

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



<i>Му</i> Сотран <u>у</u>	Inc.			
Test Form This is my form. Please fill it out.	Phone Number:	123-456-7890		
		Save and Continue	Exit	v5.16.2.0
vel. In co			rdiet. Integer id congue	
	d Name: John Doe Date: 4/4/2023		123-456-7890	

• [PEP-6056] ~Transactions

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] ~Documents ~Signing ~Transactions

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] ~API/WebServices

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] ~Workflows

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

Edit Workflow Details		×
Basic Information	Launch Rules	
Expirations	Publish this Workflow as launchable template.	
Notifications	Allow users in this Group to launch this Workflow.	
User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	
Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.	
Metadata	Allow the launch form to use the full page width (default is centered).	
Launch Display	Allow the Description to be edited at the time of launch.	
Launch Rules	Enable Bulk Launching	
Launch Web Forms	 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 V Update Workfl	ow

• [PEP-6382] ~ContentSets ~ControlPanel ~Notifications

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.

M	Company			n Dashboard Id	Reports	17 Workflow Designer	Account	<l> Developers</l>	•
	Add Content							×	
W		Name:	ExternalCustomers						
		Language:	Spanish		•				ds
			✓ Add Content	Cancel					
	Content Template Set	Name					Last Modified	Options	





Workflo	ws Web Forms Documents Content Notifications Bra	ands
Content > MyCompanyInc	Templates should appear Export Fedit De	lete
Supported Languages + Add Language	Content Page Template Last Modified Op	otior
	Access Denied	
Spanish 🗸 🗙	Authentication (Common)	
	Authentication (Experian)	
Overwrite From Another Content Template Set	Authentication (LexisNexis)	
Select the Template Set and Language you would like to use to overwrite the selected items.	Authentication (Mobile)	
	Authentication (PIN/Password)	
Template Set:	Authentication (Registered User)	
Master Set (READ-ONLY)	Cancel/Suspend	
Language:	Confirm Intent	
Spanish 🗸	Define Participant	
🕹 Overwrite Selected Items	Document Tasks	
	Exit	

• [PEP-6363] ~Security ~Workflows

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

• [PEP-6353] ~Authentication ~Signing ~Transactions

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.

it Participant Details		:
Basic Information	Authentication	
Authentication	Туре:	
User Experience	Mobile	~
Email Customization	Integration Name:	
Reminders	•	
Completed Notifications	Set permanent phone number for this workflow	
Workflow Actions	Number of phone number characters to leave unmasked:	
Workflow Rules	4	
Event Subscriptions	Save the raw response?	
Placeholders	No 🗸	
PDF Fields	Passcode length:	
Launch Rules	4	
Launch Display	Use two-factor authentication.	
Launch Domains	Second-Factor Authentication	
Launch Labels	Туре:	
	One-time PIN/Password	~
	Set permanent password for this workflow	





• [PEP-6260] ~Workflows

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	Workflow Actions	
Authentication	Action 1 O Delete	٦
User Experience	Туре:	
Email Customization	Define Another Participant	
Reminders	Participant to Define:	
Completed Notifications	Signer 2	
Workflow Actions	✓ Full Name ∨ options	
Workflow Rules	C Email Address 🗸 options	
Event Subscriptions	Phone Number Title	
Placeholders	Organization Authentication v options	
PDF Fields	Two-Factor Authentication	
Launch Rules	Custom Email Message Customize Page Content	
Launch Display		
	Add Workflow Action	J
PDF Fields	Launch Rules	
Launch Rules	This Participant is optional at launch.	
Launch Display	 Allow custom email message by launcher. 	
Launch Domains		
Launch Labels	Input Type: This Participant's information will be defined by another Participant.	
Save as Preset	Cancel 🗸 Update Participar	
Save ds Plesel		۲.

Edit Workflow Details		×
Basic Information	Launch Rules	
Expirations	Publish this Workflow as launchable template.	
Notifications	Allow users in this Group to launch this Workflow.	
User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	
Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.	
Metadata	Allow the launch form to use the full page width (default is centered).	
Launch Display	Allow the Description to be edited at the time of launch.	
Launch Rules	Enable Bulk Launching	
Launch Web Forms		
Save as Preset	Cancel 🗸 Update Workfl	ow





• [PEP-6249] ~Signatures ~Workflows

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.

 Tasks Editor 		✓ Done
	🔹 All Participants 🗸 🕞 Englise Doctorms 🖹 Blank Template 🗸	
≁ Tasks		
Label	Task Type Placeholder Type Placeholder/Position Participant Options	
>> Sig 1	Signature 🔹 Search Text 👻 Hidden Text Search All Pages 👻 Signer 1 👻 Manage Data 🛛	×
	+ Add Task	
	Edit Task Details	
	Basic Information Placement User Experience Placement Type: Style Text Placeholder Placement Placeholder Workflow Actions Placeholder Text: Hidden Text Hidden Text Launch All Pages Instance: 1 Offset Start Position: Left Iorizontal Offset: 0	

• [PEP-6207] ~Signatures ~Workflows

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

Profile Editor		×
Basic Information Signature Image	Signature Image	
Password Localization	Upload: Select image to upload	
•	Cancel Vpdate Pro	ofile





Tasks Editor	r						🗸 Done
+]	1	Signer 1	Y Enable Do	cForms 🔡	MyCompany NDA	~	->j
nu so pu	enean sagittis, dolor vitae maxin ulla. Etiam scelerisque enim id li odales sed, lobortis sed massa. urus turpis, vitae congue neque	gula laoreet dictum sit am Vivamus volutpat sit am	et quis ex. Sed tellus ris et ante rutrum ultrices. S	us, consectetur at uspendisse porta		✗ Task Options Task Type:	×
	otenti. teger convallis, felis tempus eui	smod accumsan, lorem e	nim vehicula mauris, vita	e accumsan eros		Signature	
jus pe id Do	sto eu augue. Vivamus sollicituo ellentesque auctor aliquam. Proi congue nisl turpis gravida lacus onec libero ante, dignissim quis uisque rutrum justo id mollis effi	din lacus at nisl fringilla, si n dignissim, nulla vestibul . Fusce commodo risus se maximus vitae, finibus a	it amet bibendum metus um aliquet pharetra, velit d nibh luctus, maximus e c augue. Etiam auctor ne	vestibulum. Proin est ultrices tortor, uismod ex auctor.		Label:	
ma Nu un	iquam erat volutpat. Ut ante pu agna quis ullamcorper sceleriso unc commodo vehicula hendrer na odio, tincidunt fringilla lib	ue, enim ex vestibulum to it. Duis in nisl ac lectus ve ero ultricies, ornare ulla	ortor, eget dapibus ipsun estibulum venenatis quis imcorper dolor. Pellente	n augue non erat. quis sem. Integer esque accumsan		Actual field name in final PDF:	
	alesuada ullamcorper. In aliqua unc, quis vulputate mauris. Susp			. Sed in maximus		Participant:	
dia	raesent scelerisque sem ac im am. Nullam gravida euismod n bendum quis justo. Proin neque uscipit vel orci id, dictum conse	iulla malesuada mollis. F tortor, cursus eget tincidu	usce arcu nisi, fermenti int in, scelerisque vitae ve	um ut semper in, elit. Cras arcu leo,		Signer 1 Application Type:	~
	el. In convallis lectus et felis volu					Registered Image	~
Inte	Signature:					Optional	
	IN W	TNESS WHEREOF, the	varties hereto have caus	в	t to be executed as c COMPANY: 3 Signel By Test name y: ame:	Fdit More Task Proper of the Effective Date.	195

v5.16.1.5 Release

Release Date: 3/27/2023

Bug Fixes

• [PEP-6483] ~Signing

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.

<i>ly</i> Cor	npany.nc.				🙆 Dashboard	🔟 Reports	12, Workflow E	Designer 👖 Account 🖣	/> Developers
₽	ocument Se	etup						2	Add Documents
Reorder	Document Title		File Name			Optional	Is Upload	Manage Tasks	Options
1	MyCompany NDA		MyCompa	ny_NDA.pdf				Tag Document 2	🖌 🗡
1 2	Blank Template		Blank Tem	plate			-	🗹 Tag Document 🚺) 🖍 💌
/y Cor	npany				Dashboard	내 Reports	12 , Workflow □	ner 🛛 Account 🔸	:/> Developers
m Tasks									✓ Done
		All Par	rticipants 🗸	Enable DocForms	🖺 Blan	k Template	~		
nT	asks								
	asks	Task Type	Placeholder Type	Placeholder/Position			Participant	Options	
L		Task Type Signature V	Placeholder Type Search Text	Placeholder/Position	Search A	.ll Pages →		· · ·	× ×





v5.16.1.4 Release

Release Date: 3/16/2023

Bug Fixes

[PEP-6431] ~API/WebServices ~Workflows

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

• [PEP-6427] ~Documents ~Forms

Fixed issue where duplicate fields on documents were being incorrectly omitted from the DocForms page when signing.

[PEP-6419] "Documents" "Signatures" "Signing

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] ~Documents ~Workflows

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] ~Documents ~Workflows

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] ~Transactions ~Workflows

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.

<i>Му</i> Сот	ipany, inc.	🙆 Dashboard 💾 Reports 🚺 Workflow Designer 📗	Account 🌾 Developers 🕞
Label/Description	rkflow Setup	← Back 🙋 L	auncher 🌗 API 🛓 Export 🖬 Save Options
MyCompa	any NDA		
💄 Pa	articipant Setup		
	Edit Workflow Details		×
worki	Basic Information Expirations	User Experience Notification Set:	s Brands
Label/Descripti	Notifications User Experience Email Sender	Notification Language: None (Use Default Language)	Coptions
P Role	Event Subscriptions Metadata Launch Display	Public Launch Brand: None (Use Default Branding)	✓ tions





• [PEP-6388] ~Documents

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] ~Documents

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

•

[PEP-6387] ~WorkflowActions ~Workflows

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		×
Basic Information	Workflow Rules	
Authentication	Custom Exit Url:	
User Experience	https://www.mydomain.com/mycustomexitpage/	
Email Customization	Allow participant to reassign tasks to a different person if necessary.	
Reminders	Verify/Query for:	
Completed Notifications	Full Name Email Address	
Workflow Actions	Title	
Workflow Rules	Organization	
Event Subscriptions		

• [PEP-6381] ~Forms

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.



B Web Form Editor		Save 🗸 Done
Label:		
1) Primary Beneficiary Name		
PDF Field Name: (clear)		
P1Name × *		
Comment:		
Edit Insert Format Table Tools		
B I i≡ i≡ A ∨ L ∨ P E First Name Last Name	1) Primary Beneficiary Name: First Name Last Name	×
First Name Last Name	in the second se	
		+
	1) Primary Beneficiary	
	Relationship to Insured:	
	1) Don't see the relationship option in the dropdown	
	above? Please enter the	
	relationship to the Insured:	
P - SPAN = EM POWERED BY TINY Powered BY TINY	1) Primary Beneficiary Date MM/DD/YYYY of Birth:	
	MM/DD/YYYY 📾	
Width [1-12]: Max Length: 6 px	1) Primary Beneficiary Street Address City, State Zip	
	Address:	
Placeholder Text*		
Manage Field Rules		Preview

• [PEP-6380] ~WorkflowActions ~Workflows

Fixed issue where cancelling a transaction with a custom URL would not properly cancel nor redirect as expected.

v5.16.1 Release

Release Date: 2/27/2023

Bug Fixes

• [PEP-6347] ~Transactions ~Workflows

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.

Edit Participant Details		×
Basic Information	User Experience	
Authentication	Brand:	
User Experience	None (Use Default Branding)	~
Email Customization	Content Set:	
Reminders	None (Use Default Content Set)	~
Completed Notifications	Notification Set:	
Workflow Actions	None (Use Default Notification Set)	~
Workflow Rules	Notification Language:	
Event Subscriptions	None (Use Default Language)	~
Placeholders	Document/Task Status Page:	
PDF Fields	Display before each Document if multiple Documents	~
Launch Rules	Completed Document Behavior	
Launch Display	Redirect to next Document or Exit URL	~
Launch Domains	Cancel Behavior:	
Launch Labels	Prompt Participant to choose status	~





• [PEP-6329] ~Workflows

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	A				
🏊 Signature					
<u>×ℓ</u> Initials		Lorem insum	dolor sit amet	consectetur	
🕸 Approval		Lorennipsuni	adipiscing elit	-	
🎾 Delivery					
📕 Carbon Copy		Vivamus commodo lacinia mollis aliquam, nisi sit amet pretium po	Aenean ut tellus vestibulum, mole suere, sapien ex eleifend lacus, a	stie urna eu, facilisis eros. Quisque pellentesque lectus velit sit amet	
Edit Participant Details Basic Information	Workfl	ow Rules			×
Authentication	Custom Exit	Url:			
User Experience	https://ww	w.mydomain.com/mycustome	xitpage/		
Email Customization	Allow pa	rticipant to reassign tasks to a	different person if nece	essary.	
Reminders	Verify/Query	y for:			
Completed Notifications	Full Nam Email Ad				
Workflow Actions	Title				
Workflow Rules	Organiza	ation Access Window:			
Event Subscriptions		1 1 1 1			

• [PEP-6303] ~Forms

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		✓ Done
[+	Signer 1 💙 🗹 Enable DocForms 🖺 My	yCompany NDA 👻
Edit Form Field Details	; ×	🖌 Field Options 🗙 🌢
Basic Information	Style	Field Type: Textbox
Style Placement	Font Color: Blue	Participant: (field access) Signer 1
	12 pt Leave blank for "Auto-Size" Alignment:	Field Name: Company Name
	Multiline Hidden	Actual field name in final PDF:
	Read-Only Locked	Initial Value: Company Name
	Cancel 🗸 Update ind	Multiline
	Signer 1 (Signature)	Required
	ne:	Convert Field to Task
	te:	Edit More Field Properties

• [PEP-6298] ~WorkflowActions ~Workflows

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.





E-Sigr	nature Proce	ess Explanation		
Thank you for ag electronic signate		line. This fast, safe and secure process wil	l permit you to review your document and sign onlin	e with a legally valid
This process cons	sists of the following steps:			
 Test C Addit 	nt:MyCompany NDA Completion Web Form tional Document Upload y your Electronic Signature to the	document		
You will have a ch	hance to review the final docume	nt and then apply your electronic signatu	re. You will be able to download a signed copy of the	e agreement after signing.
	Edit Participant Details			×
work	Preset:	🛱 Apply a Preset	✓ Manage Presets	5 Brands
Label/Descripti	Basic Information	Workflow Actions		Export Save
Docume	Authentication	Action 1	S D	elete
	User Experience Email Customization	Type: Process Explanation		
Role P	Reminders Completed Notifications	Add Workflow Action	Show Advar	tions
Signer 1	Workflow Actions			

• [PEP-6286] ~Signatures

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		MyCompa	ny NDA 🗸	- \
Edit Signature Block D	ata Details		×	🖌 Sig Block Data Options	×
Basic Information Style Placement	Style Font: Helvetica Color: Black Bold Italic Auto-fit signatures inside signature field dimensions.	•		Data Type: Printed Name Font: Helvetica Color: Blue Color: Edit More Data Item Prope	✓erties
Signat	✓ Update Data over Initials: Spar 1 Biparton	Cancel		 Copy Data Item X Delete Data Item 	





• [PEP-6280] ~API/WebServices ~Forms

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.

М	y Company . Inc.			æ	Dashboard	<u>⊯</u> Reports	tz(w	orkflow Designe	🛙 👖 Account 🕨	> Developers	•
W	orkflow designe	ſ/we	user: b forms		Sroup: MyCompany orkflows We	r, Inc. b Forms	Docu	uments Cor	ntent Notifica	tions Bran	ds
	Type to filter Web Forms		Group Web Forms			~	đ	1 Import	+ Add Web	Form	
	🔷 Web Form	\$ Temp	late Name	÷	Created By	∲ Gr	oup	Created	Last Mod ¹ Test	Web Form	
6	My Untitled Form	EE Data	Sheet.pdf	<	-	MyComp	any, Inc.	2020-07-01	2023-02-13		×
	You are currently in "Test Mode". Plea Live URL for API Usage: For Participant Workflow Actions: https://uat.alphatrust.com/sign/part							n or this page.	-		
	For Task Workflow Actions: https://uat.alphatrust.com/sign/task	-action/we	b-form?id=c84ffbee-e451-	34ee	-ca28-30e6338	a5384					
	Untitled Form This is my form. Please fill it out.										
	SSN 3:										

• [PEP-6278] ~Signing ~Transactions

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.

My Company .m.	🙆 Dashboard 🔟	Reports 😰 Workflow Designer 📱 Account 🌾 Developers 🛛
Document Setup		⊮ ^h Add Documents
Document Title MyCompany NDA	File Name MyCompany_NDA.pdf	Is Upload Manage Tasks Options
	✓ Add Document(s)	
	Enable DocForms A M	VCompany NDA
Lorem ipsum dolor s		
Vivamus commodo lacinia mollis. Aenean utitellus v alquam, risi sit amet prelium posuere, sapien ex dam. Present impedide leo quis hendrent con drissi impartide viennatis. Praesent et vestbulun Aenean sagitis, dolor vite maximus pharetra, ligu nulla. Etiam socierisque en ini di guia lacoret dicto, sodales sed, bobrits sed massa. Vivamus volube purus furps, vitae congue negue eusmod a. Sed	estibulum, molestie uma eu, facilisis eros. Quisque delfand lacus, a potentesque loctus veilt si tarnet soctetur. Phasellus rhoncus felis at ross dictum loc. Nutil a thorous Instigue ocri non vestibulum la purus molestie justo, a maximus som dohor vitee m si tarnet quis o. Sod follus rissi; consectetur at	Actual field name in final PDF: Participant: Jane Doe V
potenti. Integer convalis, felis tempus euismod accumsan justo eu augue. Vivarnus soliicitudin lacus at rist fi id conjue nist turpis gravida lacus. Fuses commod Donec libero ante, dignissim qui smaximus vileo, Quisque rutrum justo id molts efficitur. Proin id acc	ingilla, sit arnet bibendum metus vestibulum. Proin vestibulum aliquet pharetra, veilit est ultrices tortor, risus sed nibh luctus, maximus euismod ex auctor. inibus ac augue. Etiam auctor nec sem eu mattis.	Application Type: Font-Stamped (Default)





• [PEP-6277] ~Signing ~Transactions

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.

Му Сот	ipany. Inc.	🚯 Dashboard 🔟 Reports	12 Workflow Designer 🛛 Account 🌾 Developers 🕞
Label/Description	rkflow Setup		← Back [2] Launcher 🥠 API 🛓 Export 🖬 Save Options
MyCompa	iny NDA		
💄 Pa	articipant Setup		
	Edit Workflow Details		×
worki	Basic Information	User Experience	s Brands
	Expirations	Notification Set:	
Label/Description	Notifications		↓ Export ■ Save Options
	User Experience	Notification Language:	
MyComp	Email Sender	None (Use Default Language)	✓
	Event Subscriptions	Public Launch Brand:	
P	Metadata	None (Use Default Branding)	~
Role	Launch Display	Prompt Participants for Cancellation Reason	tions
Internal	Launch Rulas		

• [PEP-6242] ~Documents

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.

My Company .inc.	🚱 Dashboard 📖 Reports 👖 Workflow Designer 🞚 Account 🌗 Developers 🕻
User:	Group: MyCompany, Inc.
reports / verify document	Status Trends Completion Rates Verify Document
Value was either too large or too small for an Int32.	
Document File Verification	0
Use the form below to perform document file verification (digital signature cheer document repository.	k) on a copy of a document that was signed but not stored in this server's
Document ID: 10008566941	Verify Document





• [PEP-6233] ~WorkflowActions

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.

My Company , Inc.	

• [PEP-6215] ~Security ~Signatures

Fixed issue where signing sessions would not properly expire if you started another one.

• [PEP-6156] ~Emails ~Notifications

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] ~ControlPanel ~Documents ~Workflows

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.

	•	
Rental. ۱	ext Field Properties	×
Tradema	General Appearance Position Options Actions Format Validate Calculate	nection with any trademarks
or servic	Name: TestField2	
Termina	Tooltip:	oft may terminate this EULA
if you fai		ULA. In such event, you must
destroy		arts.
		°
Initials1	Common Properties	2: trastField2
	Form Field: Visible	4
	Orientation: 0 v degrees 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 ext that such activity is expressly permitted by applicable law notwithstanding this	en
	limitation. b. Rental. You may not rent, lease or lend the Product.	
	 Trademarks. This EULA does not grant you any rights in connection with any trade a or service marks of Megasoft. 	arks
	d. Termination. Without prejudice to any other rights, Megasoft may terminate to EU if you fail to comply with the terms and conditions of this EULA. In such every you m	
	destroy all copies of the Product and all of its component parts.	
	INITIALS	





Release Date: 2/25/2023

Bug Fixes

• [PEP-6355] ~AuditReport ~Transactions

Fixed issue where the incorrect Participant IP address was being recorded and logged on the Audit Report.

v5.16.0.1 Release Bug Fixes

Release Date: 2/23/2023

[PEP-6336] ~Authentication ~Workflows

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		×
Basic Information	Workflow Actions	
Authentication	Action 1	O Delete
User Experience	Туре:	
Email Customization	Define Another Participant	~
Reminders	Participant to Define:	
Completed Notifications	Signer 2 🗸	
Workflow Actions	✓ Full N me ✓ options	
Workflow Rules	Email Address v options Phone Number	
Event Subscriptions	🗌 Title	
Placeholders	 Organ zation Authentication v options 	
PDF Fields	Two-Factor Authentication	
Launch Rules	Custom Email Message	
Launch Display	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] "ControlPanel "Documents" "Workflows"

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.

🕞 Tasks Editor	✓ Done
Any Participant 🗸 🗖 Enable DocForms 🖺 N	NDA JH1 🗸
Lorem ipsum dolor sit amet, consectetur adipiscing elit	✔ Field Options x ↑ Field Type:
Vivamus commodo lacinia mollis. Aenean ut tellus vestibulum, molestie uma eu, facilisis eros. Quisque aliquam, nisi sit amet pretium posuere, sapien ex eleffend lacus, a pellentesque lectus veilt sit amet diam. Praesent imperdiet loe quis hendrent consecteur. Phaselius rhoncus feils at risus dictum blandt. Quisque libero veilt, scelerisque nec augue a, convallis consequat metus. Duis feugiat sed risus imperdiet venenatis. Praesent et vestibulum loo. Nulla rhoncus fristique orci non vestibulum. Aenean sagittis, dolor vitae maximus pharetra, ligula purus molestie justo, a maximus sem dolor vitae nulla. Etam scelerisque enimi di gula laoreti dictum sit amet quis ex. Sed tellus risus, consectetur at sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante ante rutrum ultrices. Suspendisse porta purus turpis, vitae congue neque euismod a. Sed commodo do ac felis suscipit feugiat. Suspendisse potenti. Integer convallis, felis tempus euismod accumsan, lorem enim vehicula mauris, vitae accumsan eros justo eu augue. Vivamus gingissm, nulla vestibulum alquet pharetra, veilt est ultrices tortor,	Textbox Participant: (field access) Any Participant Field Name: Approval Date Initial Value: xx/xx/xxxx
id congue nist turpis gravida lacus. Fusce commodo risus sed nibh luctus, maximus euismod ex auctor. Donec libero ante, dignisism 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. Dus in nisl ac lectus vestibulum venenatis quis guis sem. Integer uma odio, tincidunt fingilia libero ultricies, ornare ullamcorper dolor. Pellentesque accumsan matesuada ullamcorper. In aliquam sagittis risus, eget elementum nunc feugiat eu. Sed in maximus nunc, quis vulputate mauns. Suspendisse auctor suscipit ex id blandit.	 Multiline Required Edit More Field Properties
Praesent scelerisque sem ac imperdiet omare. Sed dignissim erat lacinia, sagititis turpis et, molis diam Nullam gravida evaimod nulla malesuada mollis. Fusce arcu nais, fermentum ut semper in, bibendum quis justo. Proin neque tortor, cursus egettincidunt in, scelerisque vitale velt. Cras arcu leo, suscipit vel orci di, dictum consequate massa. Curabitur posure nate justo, id iacultis ex formentum vel. In convallis lectus et felis volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.	Copy Field
[Printed Name:] Printed Name:	



dashboai	rd / workflow templates laund	Ch Quick Stats	Workflow Templates Launch Pending Signatures					
Sample \	Workflow / File		← Back 🚿 Single Launch 🛆 Test 🧨 Edit					
Below is the leger	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	Туре	Required					
A	FullName	Participant	Yes					
в	EmailAddress	Participant	Yes					
C	[field name here]	Document	No					
	Lownload Launch Template CSV							

• [PEP-5497] ~Signing

Switched all new transactions over to use the new Signing UI. The new Singing 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] ~Integrations

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.

-		ompar	Add Integration	BE LITHOUTH HE SERVIC OF LANDAUTE	>	C Dever	opers
а	CC(ount	Integration	Integration		erms Integ	grations
				Account-Wide (shared to all other Groups and Sub-Groups if applicable)			
	T	Type to filter		Integration Name:		ntegration	0
	\$ ID	🔷 Integratio				Туре	Options
-5	26	-		Provider:		ndows ADFS	
- 4	23	-		Please select one		soft Azure AD	
-3				Please select one SSO Authentication			
				Windows Active Directory Federated Services (ADFS) Cancel	egration	ian Precise ID	
-9	41			Microsoft Azure AD		exis Nexis	
-4	22			Okta Knowledge-Based Authentication	~	Okta	
-5	27			Experian PreciseID	~	SendGrid	
-5	20			Lexis Nexis Mobile Authentication	~	Twilio SMS	
-20				Twilio Sms	~	Twilio Verify	
	\$ 38			Twilio Verify Email Services	~	I willo verity	
				SendGrid			
				Logging, Monitoring, and Analytics			
				Google Tag			

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• [PEP-5288] ~Signing ~Integrations

Implemented ADFS, Azure, and Okta SSO for the new Signing UI. Please see the image below for more details.

<u> </u>	yee	mpar-					ant v r Dev	elopers
			Add Integration			×		
ac	CCC	ount	Integration	Integration			erms Int	egrations
				Account-Wide (shared to all other Groups and Sub-Groups if applicable)				
	7	ype to filter		Integration Name:			ntegration	0
	¢ ID	Integration					Туре	Options
	26	-		Provider:			dows ADFS	
	23	-		Please select one			soft Azure Al	
_	23			Please select one			SOIT AZUIE AL	4
	4	-		SSO Authentication	Add Integration		ian Precise ID	1
-46	41	-		Windows Active Directory Federated Services (ADFS) Car Microsoft Azure AD	 Add integration 	.	exis Nexis	
	22	-		Okta	~		Okta	
	22			Knowledge-Based Authentication	•		OKIa	
\$	27			Experian PreciseID Lexis Nexis	×		SendGrid	
	20			Mobile Authentication	~	1	wilio SMS	
1	38			Twilio Sms	~	T	wilio Verify	
-				Twilio Verify Email Services				
				SendGrid				
				Logging, Monitoring, and Analytics				
				Google Tag				

• [PEP-4977] ~Documentation

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

• [PEP-4096] ~Signing

Made improvements to the HTML Document Type Signing UI to be more consistent with the pdf Signing UI.

• [PEP-4090] ~API/WebServices ~Signing

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: <u>https://developers.alphatrust.com/getting-started/installation/health-status-monitoring.html</u>.

• [PEP-3870] ~Signing

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.

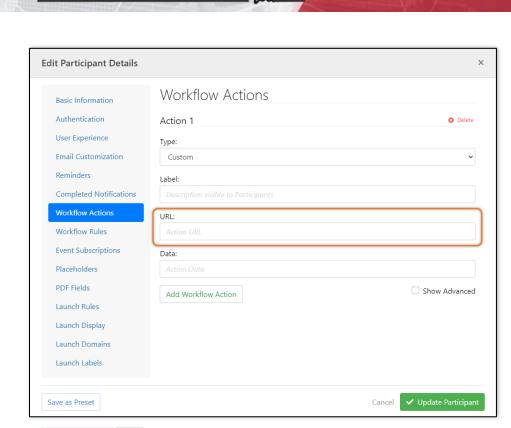
Improvements

• [PEP-5816] ~Documentation ~Installer

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/.

• [PEP-5779] ~WorkflowActions

Changed the max characters for Workflow Action URLs from 512 to 2083. Please reference the image below for more details.



• [PEP-5350] ~Integrations ~SMS

at AlphaTrust

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.

м	yco	ompar	Add Integration		Reports 17 Workflow Designer	X X	int	lopers 🕞
ac	CCC	ount	Integration	Integration			erms Inte	grations
	r 7,	ype to filter		 Account-Wide (shared to all other Groups and Sub-Groups if applicabl Integration Name: 	le)		ntegration	0
	¢ ID	Integration		Provider:			Туре	Options
	26	-		Please select one			ndows ADFS	
	23	-		Please select one			soft Azure AD	
*	4	-		SSO Authentication Windows Active Directory Federated Services (ADFS)	Cancel ✓ Add Integration		ian Precise ID	
- 6	41	-		Microsoft Azure AD			exis Nexis	
-%	22			Okta Knowledge-Based Authentication	✓		Okta	
-\$6	27			Experian PreciseID Lexis Nexis	~		SendGrid	
-\$6	20			Mobile Authentication	~	т	wilio SMS	
*	38			Twilio Sms Twilio Verify	~	T	vilio Verify	
				Email Services				

• [PEP-5297] ~Reports ~UI/UX

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.

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MyCompany. Inc.	Ø	Dashboard 🗠 Reports 1	🕻 Workflow De	signer 🞚 Account 🂔 Dev	elopers 🕞
reports / status	User:	Group: MyCompany Inc	Trends C	completion Rates Verify [ocument
Search by Transaction 1 Transaction ID Transactions Documents Participants Tasks	D or 🔁 2022-01-01	~ 2022-09-13 🗎 🛛 Any	\$ Status	Q Search ✓ Advanced	Options C D O
MyCompany Inc				Bac	k to top 个
My Company , Inc.	Ø	Dashboard 🔟 Reports	🛿 Workflow De	esigner 🞚 Account 🂔 Dev	velopers 🕞
reports / status	User:	Group: MyCompany Inc	Trends C	Completion Rates Verify [Document
Advanced Search			🛓 Expor	rt Options Advanced	0
Search For Transactions	Search Text Search by Transaction ID		Status Any Status		~
Transactions Transa Documents Participants Tasks Search Everything	Date Range 2022-01-01 ~ 2022-09-1 Test Transactions		Date Type		~
 This Group 	A Exclude Tests	v	Q Sea		
		Created Date	StatusCompleted	Closed Date	Options

• [PEP-5278] ~Reports ~UI/UX

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

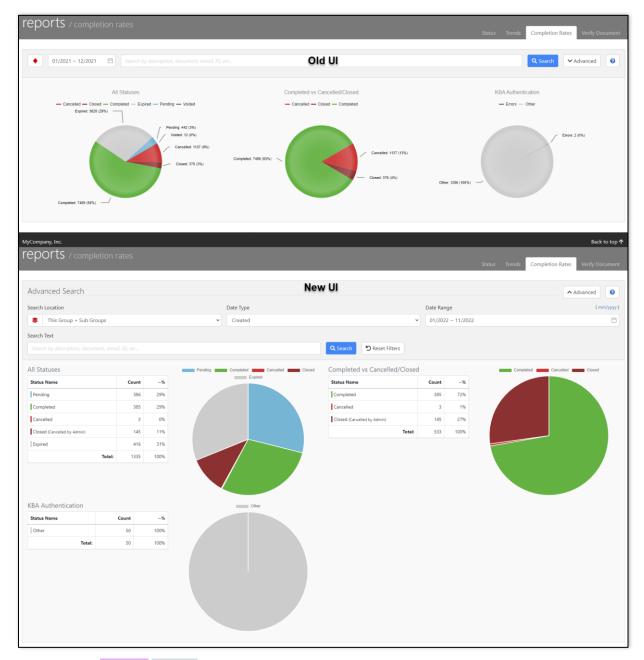




reports / trends Trends Old UI Advanced Search ∧ Advanced 0 (mm/yyyy) Search Location Date Type Date Range 📚 This Group + Sub Groups ✓ 01/2021 ~ 12/2021 Ë ✓ Created Count Type Status ✓ Q Search CRESET Filters Count by Transaction Any Status ~ Transaction Count Group Name Trends by Transaction 25 Accounting 2 1 Human Resources 20 MyCompany, Inc. 33 15 Total: 36 Accounting
 Human Resources
 MyCompany, Inc. 10 5 FORTH MARTH MARTH MARTH WATH WATH MARTH GARTH ONTH MONTH OPEN 180-21 reports / trends Trends New UI Advanced Search ∧ Advanced 0 Search Location Date Type Date Range (mm/yyyy) Sthis Group + Sub Groups 01/2022 ~ 11/2022 Ë Created ~ ~ Count Type Status Q Search ່ງ Reset Filters ~ Count by Transaction Any Status Trends by Transaction Group Name Transaction Count Default Account _____ SubGroup Default Account 1,150 450 SubGroup 185 400 Total: 1,335 350 300 250 200 150 100 50 0 **.** Jan-22 Mar-22 Apr-22 Jul-22 Sep-22 Feb-22 May-22 Jun-22 Aug-22 Oct-22 Nov-22



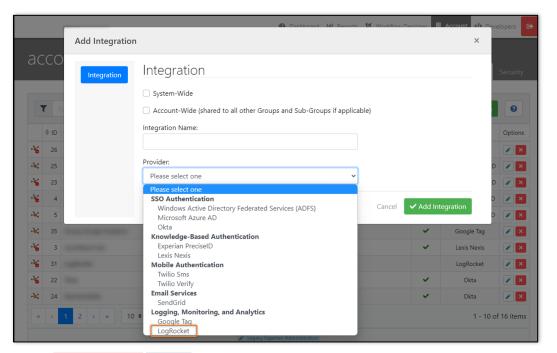




• [PEP-5037] ~Logging ~Signing

Added LogRocket integration for the new Signing UI. Please reference the image below for more details.





• [PEP-4830] ~API/WebServices ~Signing

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.

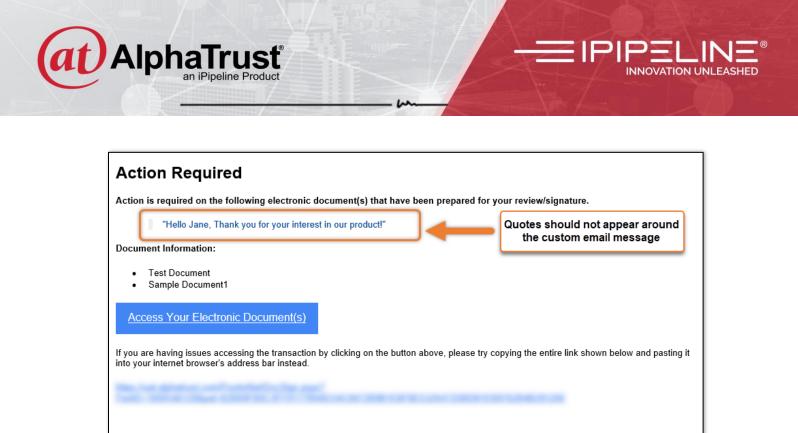
Bug Fixes

• [PEP-6012] ~Emails ~Workflows

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.

lashboa	ard / workflow templates launch	Quick Stats Workflow Temp	lates Launch Pending Signatures				
Testing			← Back 🐗 Single Launch 👗 Test 🧨 Edit				
🗴 Upload C	SV 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	Туре	Required				
A	FullName	Participant	Yes				
В	EmailAddress	Participant	Yes				
с	CustomEmailMessage	Participant	No				
D	AdditionalNotificationEmails	Workflow	No				
	🛓 Download Li	aunch Template CSV					

INNOVATION UNLEASHED



• [PEP-6008] ~Logging ~Signing

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] ~BrandSets ~Signing

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	Launch Rules	
Expirations	Publish this Workflow as launchable template.	
Notifications	Allow users in this Group to launch this Workflow.	
User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	
Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.	
Metadata	Allow the launch form to use the full page width (default is centered).	
Launch Display	Allow the Description to be edited at the time of launch.	
Launch Rules	Enable Bulk Launching	
Launch Web Forms	 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 	





Edit Participant Details		×
Preset:	\Xi Apply a Preset 🔹 Manage Presets	
Basic Information	User Experience	
Authentication	Brand:	
User Experience	MyCompany	~
Email Customization	Content Set:	
Reminders	None (Use Default Content Set)	~
Completed Notifications	Document/Task Status Page:	
Workflow Actions	Display before each Document if multiple Documents	~
Workflow Rules	Completed Document Behavior	
Event Subscriptions	Redirect to next Document or Exit URL	~
Placeholders	Cancel Behavior:	
PDF Fields	Automatically leave in Pending status	~
Launch Rules	Error Behavior:	
Launch Display	Redirect directly To Exit page URL	~
Launch Domains	Document Options:	
Launch Labels	 Display document download(s) on the Exit page upon completion Allow access to all Transaction documents regardless of participation 	

it Group		
Basic Information	User Experience	
Document Integrity	Brand:	
Security	МуСотрапу	~
Privacy Policy	Content Set:	
User Experience	Select One	~
Logo	Notification Set:	
Multi-Factor Authentication	Select One	~
Email Services	Email Language:	
	Use Default Language	~

• [PEP-5904] ~Signatures ~Signing

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





• [PEP-5815] ~Workflows

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

	Edit Workflow Deta	ils		×									
wor	Basic Information	Launch Rules			Brands								
	Expirations	Publish this Workflow as launchab	le template.										
	Notifications	Allow users in this Group to launch	h this Workflow.		ort 🖬 Save								
Label/Desc	User Experience	Allow users in all Sub Groups in the	is account to launch this Workflow.		Options								
Docur	Email Sender	Allow the Workflow launcher to ac	dd additional/unique email addresses	at the time of launch.									
	Event Subscriptions	Allow this Workflow to be launche	d publicly with no authentication req	juired.									
	Metadata	□ Allow the launch form to use the f	ull page width (default is centered).										
Role	Role Launch Display Allow the Description to be edited at the time of launch.												
Signe	Sign Launch Rules C Enable Bulk Launching												
	Launch Web Forms				nced								
					leeu								
	Save as Preset		Can	cel 🗸 Update Workflow									
)ocument Set			Add *	Documents								
dash	board / wor	kflow temples launch											
			Quick Stats Workflow	Templates Launch Pending S	Signatures								
Doc	ument(s) u	need to sign		← Back 🐗 Single Launch 🛽	Test 🥜 Edit								
DUC		ieed to sign		A B	C								
🗴 Uplo	oad CSV File		Full	Name* EmailAddress*	_								
	Upload CSV	Browse for file	3										
			4										
		🌲 Send Bulk Launch	7 Th	e expected header row that be in the Bulk Launch CS									
					ville								
Below	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	Na	me	Туре	Required									
A	Fu	llName	Participant	Yes									
в	En	nailAddress	Participant	Yes									
		🕹 Download Laun	ch Template CSV		Launch Template CSV								

• [PEP-5812] ~Workflows

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





	A	В	С	D
1	FullName*	EmailAddress*		
2				
3				

Simple	
	rently processing \bigcirc Transactions. You may either wait for the Transactions to complete eturn later to check your status. We have emailed you a link back to this page and we ng has completed.
Bulk Launch Status	
	3
← Back to Launch Form	Fdit Workflow Vorkflow Templates Launch

• [PEP-5775] ~Notifications

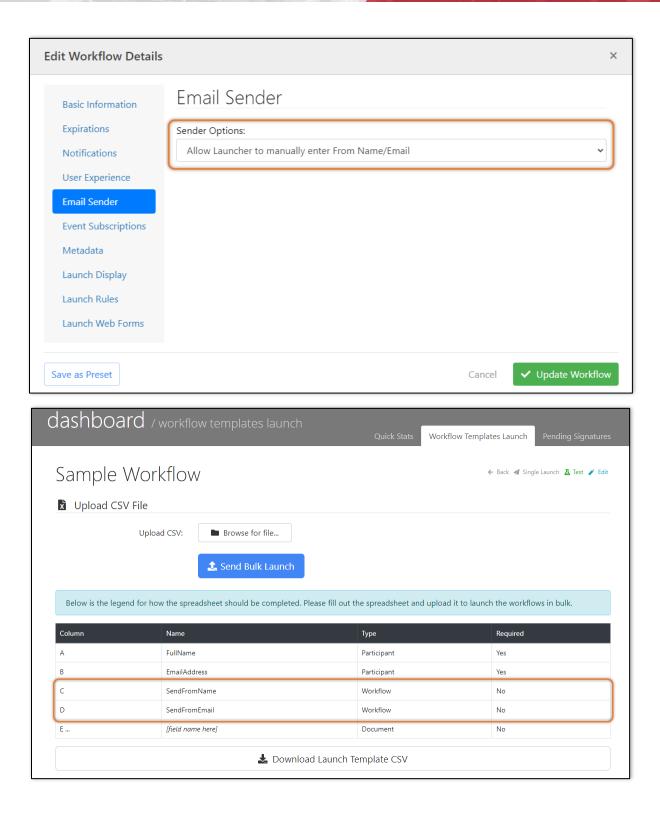
Fixed a typo in the Notifications placeholders. Changed "Participant First Namee" to "Participant First Name". Please reference the image below for more details.

Notificat	tion Template Editor			×
Subject:	Document Transaction Completed	for {{PARTICIPANT_FULLNAME}}		
Body:	Edit Insert Format Table Tools	Insert e-Sign Placeholders		
	B I ⋮ ∷ A ∨ ∠ ∨ o {{ACCOUNT_LOGO}} Document Trans It is recommended that you save any att NOTE: The final document(s) may not b Document Information: {{DOCUMENT {{EMAIL_FOOTER}}	Transaction Description Participant Access Link	d > transaction has completed successfully.	
	DIV ✓ Update Notification Template	Participant First Name Custom Message to Participant Participant List (Bulleted) Participant List (Comma Separated) Document List (Bulleted) Document List (Bulleted w/ IDs)	POWERED BY TH	NY 💉

[PEP-5670] ~ControlPanel ~Workflows

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.





INOVATION UNLEASHED





• [PEP-5540] ~ControlPanel ~Workflows

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.

My Company . Inc.		🖚 Dashboard 🔟 Repo	rts 🔰 Workflow Designer 👖 A	Account 🌗 Developers 🕞
world ou designed	User:	Group:		
workflow designer / work	kflows	Workflows Web Forms		
Sign & Send 🚱	Send for Signature	0	Create a Template	0
$\blacksquare \checkmark \rightarrow$	\rightarrow		<u> </u>	
I need to sign documents	I need to s	end out	I want to create	e a re-useable
and then send them to	documents to a	thers to sign	Workflow tem	plate that can
other recipients.	and send them	back to me.	be launched n	nultiple times.
workflow designer / work	flows			
	v	Vorkflows Web Forms	Documents Content	Notifications Brands
T Workflow Setup				← Back 🐇 Export 🔒 Save
Label/Description				Options
Document(s) I need to sign				
💄 Participant Setup				
Role Full Name	Email Address	In-P	erson Final Email Include	Docs Options
Signer Jane Doe	jdoe@mail.com			🚊 🖌 🗡
+ A	dd Participant		+ Add Me	+ Add Advanced
Final Email Notifications				
Once your workflow transaction has been fully comp following settings. If you want final email notification				-
Send If Completed Send If Canc	elled 🕥 Send If E	xpired 🕥 Attac	h Signed Documents	
	+ Add Email Recipien	t		+ Add Me

• [PEP-5535] ~Signatures ~Signing

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.





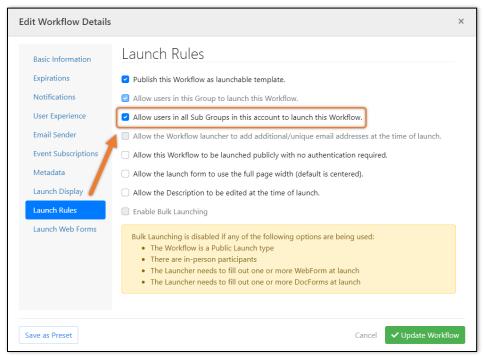
🕞 Tasks Editor			🗸 Done
I +-	Signer 1	 Enable DocForms MyCompany NDA 	+1
🕞 Task Placement	A	potenu. Integer convallis, felis tempus euismod accumsan, lorem enim vehicula mauris, vitae accumsan eros	
<u>I≁</u> Signature		justo eu augue. Vivamus sollicitudin lacus at nisl fringilla, sit amet bibendum metus vestibulum. Proin pellentesque auctor aliquam. Proin dignissim, nulla vestibulum aliquet pharetra, veilt est ultrices tortor, id conque nist lurpis gravida lacus. Fusce commodo risus sed nibh luctus, maximus euismod ex auctor.	
<u>×</u> ℓ Initials		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.	
😵 Approval		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 ledus vestibulum venenatis quis quis sem. Integer urna odio, tincidunt fringilla libero ultricies, ornare ultamcorper dolor. Pellentesque accumsan malesuada ultamcorper. In aliquam sagittis risus, eget elementum nunc feugiat eu. Sed in maximus	
🖺 Carbon Copy		nunc, quis vulputate mauris. Suspendisse auctor suscipit ex id blandit.	
Head Add Signature Block Data		Praesent scelerisque sem ac imperdiet omare. Sed dignissim erat lacina; sagtitis 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 funcidunt in, scelerisque vitae veilt. Cras arcu leo.	
Printed Name		suscipit vel orci id, dictum consequat massa. Curabitur posuere ante justo, id iaculis ex fermentum vel. In convaliis lectus et feiis volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.	
Signature Date		Sever 1 (Initials	
Title			
Organization Email Address		Signature:	
IP Address		Printed Name Printed Name a printed name on the document.	
Document ID		Date:	

• [PEP-5488] ~Forms

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.

• [PEP-5486] ~API/WebServices

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.





My Company . 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 V 2 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] ~Access/Permissions ~API/WebServices ~Workflows

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] ~WorkflowActions

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.

My Company 📾 Dashboard 🖽 Reports									s 12	(Worl	flow D	esigne	er 🛙	Acc	count		Deve	lopers		
а	CCC	Dunt / perr	nission sets	User:	Gro	oup:			P											
	Ţ	Type to filter Permissi	on Sets		Gro	ups	U	lsers	F	Permi	ssion	Sets	Bu	lk Per		_	-	ation	Adm	Security
	¢ ID	🔷 Name	\$ System-Wide	Account-Wide	Sub Group Shared	\$:	<u></u>	₽.	7 *			•	⊗.	⊼	¢	20	۶	-×	Options
•	ID	Name Administrator	\$ System-Wide	Account-Wide	Sub Group Shared													<i>P</i>		
P P	ID12	Administrator				0					•	0 0					0	-	0	Options



dit Participant Details		×
Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Actions Workflow Rules Event Subscriptions Placeholders PDF Fields	Authentication Type: Mobile Integration Name: Select a Integration TwilioTest TwilioTest TailoSmoOnd ave unmasked: Save the raw response? Passcode length:	
Launch Rules Launch Display	4 Use two-factor authentication.	
Launch Domains		

• [PEP-5440] ~Workflows

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.

М	y Company . Inc.		Ð	Dashboard 🔟 Repor	ts 1 Workflow De	esigner 🛄 Accou	int Developers
W	orkflow designer / workflows	We	Gro	oup: MyCompany, Inc. ows Web Forms	Documents	Content Not	ifications Brands
	Type to filter Workflows Private Wo	orkflows		~	E Imp	bort + New	Workflow
	\$ Workflow	\$	¢	Created By	Created	Last Modified	Options
7	Pending Sig WF Bug			Bob Jones	2022-01-31	2022-04-20	
5	Test Workflow			Bob Jones	2022-02-17	2022-02-17	Z A D 🗡 🗙
Ċ,	Sample - In Person			Bob Jones	2020-10-16	2022-02-08	24.2
4	ADP test			Bob Jones	2021-09-15	2021-09-15	
÷	Test Completion NEW - COPY			Bob Jones	2021-08-18	2021-08-18	24 🔍 💌
Ċ,	Sample - Email Only			Bob Jones	2020-10-13	2021-08-04	
÷	Sample - In Person & Email			Bob Jones	2020-10-01	2021-08-04	Z 🛯 🖉 🗙
			8	Bob Jones	2021-04-07	2021-08-04	

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• [PEP-5421] ~EventSubscriptions ~Workflows

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

Edit Participant Details		×
Basic Information	Event Subscriptions	
Authentication	Subscription 1	😮 Delete
User Experience	Type:	
Email Customization	Authentication Failed Event	
Reminders	• Webhook O Email O SMS	
Completed Notifications	URL:	
Workflow Actions		
Workflow Rules	Data:	
Event Subscriptions		
Placeholders	Add Event Subscription	Show Advanced
PDF Fields		
Launch Rules		
Launch Display		
Launch Domains		

• [PEP-5240] ~Authentication ~Transactions

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.

Edit Participant Details		×
Basic Information	Authentication	
Authentication	Туре:	
User Experience	Mobile	~
Email Customization	Integration Name:	
Reminders	Select a Integration 👻	
Completed Notifications	Set permanent phone number for this workflow	
Workflow Actions	Send to mobile phone number:	
Workflow Rules	+447975777666	
Event Subscriptions	Number of phone number characters to leave unmasked:	
Placeholders	4	
PDF Fields	Save the raw response?	
Launch Rules	No 🗸	
Launch Display	Passcode length:	





• [PEP-4984] ~WorkflowActions

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

Edit Task Details	×	Porte of Frontis
Basic Information User Experience Style Placement Workflow Actions Event Subscriptions Launch	v	Task Typ Initials Label: Actual fid 321e0
Cancel V Update Suscipit vel orci id, dictum consequat massa. Cur Vel. In convalis lectus et felis volutpat, eu sollicituc Signer 1 [Inifals] Signature: Printed Name: Printed Name	Task	Participa Signer Applicati Font-S Optic
Both documents should not a Document Review p 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 during the signing process. If the document already contains one or more signatures, you will see those present in the document.	age.	
Image: Sample Document1 Continue		C ^a Open

• [PEP-4322] ~UI/UX

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.





or		Edit Form Field Details		>
R Task Placement	A	Basic Information	Options	
gnature		Style	Option 1	O Delete
itials		Placement	Name:	
oproval		Options	Full Name	
			Value:	
			SignerName	
DocForms Field Placement		_	Selected	
Textbox			Add Option	
Checkbox				
Radio Buttons				Cancel Vpdate Field
Drop-Down List		paras tap	of their congreened as one continuer and actors subart to g	na. ouspondioso
Multiline Textbox		justo eu au pellentesqu id congue r Donec libe	ivalis, felis tempus euismod accumsan, lorem enim vehicula mauris, vitar gue. Vivamus sollicitudin lacus at nisi finigila, sit amet bibendum metus a ue auctor aliquam. Proin dignissim, nulla vestibulum aliquet pharetra, velit sit lurpis gravida lacus. Fusce commodo risus sed nibh luctus, maximus eu ro ante, dignissim quis maximus vitae, finibus ac augue. Eliam auctor ne trum justo i dmolis efficitur. Proin di accumsan nunc.	vestibulum. Proin est ultrices tortor, uismod ex auctor.

• [PEP-3438] ~Signing

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.

	2 /	3 -	100% -	+ 🕄	\$
Elmer Fudd					
				l suu	
				rins is just some sample text	
					33 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5
	Efme	er Fudd			

• [PEP-2979] ~Signatures ~Workflows

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

• [PEP-2555] ~Groups

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.





Basic Information	Security	
Document Integrity	Session Expiration:	
Security	30 minutes (leave blank for default)	
Privacy Policy	Users Password Change Required:	
User Experience	# of Days Until Password Change	
Logo Multi-Factor Authentication	Require after:	
Email Services	Change API Secret:	
	KBA Allow Fail:	
	None	
	Lock out System-Wide Administrators	
	Enable User Permissions to automatically cascade to Sub-Groups	

• [PEP-2554] ~Documents ~Groups

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.

lit Group	
Basic Information	Document Integrity
Document Integrity	Document Retention:
Security	Purge at specified # of days after 'Completed' 🗸 🗸
Privacy Policy User Experience Logo Multi-Factor Authentication Email Services	Retention Days Before Purge: 40 This is the number of days that the documents will be deleted from the server once a document is set to the "Completed" status. If you want all documents to be deleted after one year of being completed, set this value 365.
	Enforce Digital Signature:
	None 🗸
	Cancel 🗸 Update Group





[PEP-1643] ~ControlPanel ~Users •

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

Edit User	x	
Basic Information	Organization	
Organization	Group:	
Permissions	MyCompany Inc	
SSO Logins	Title:	
	Organization:	
	Required Password Change Schedule:	
	Never	
	Cancel 🗸 Update User	

v5.15.10 Release

Release Date: 11/3/2022

Bug Fixes

• [PEP-5715] ~Forms

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.

My Company , Inc.			
3. Your Emplo	oyment Deta	iils	
Your current job(s):			
Length of service:			
Please indicate your current employment status (tick all that apply):	 Employed Self-Employed Company Director Unemployed 	Required	
Please state your normal working hours:			

[PEP-5662] ~Workflows ٠

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.



Upload Documents from your computer	Choose from the Documents repository	Upload the Document on the launch page
Browse for documents to upload	Select an existing Document Tem 💌	+ Use a Blank Template

• [PEP-5420] ~Workflows

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.

My Com	ipany.inc.		🙆 Dashbo	oard Reports	超 Workflow Designer	且 Account Deve	elopers 🕞
workf	low designer / "	user: Porkflows	Group: MyCo Workflows	ompany, Inc. Web Forms	Documents Conter	nt Notifications	Brands
Vor	kflow Setup				← Back	🕑 Launcher 👍 API 🛓 Ex	port 🖻 Save
Label/Description							Options
Role Par	rticipant Setup	Email Address		In-Perso	on Final Email Ing	clude Docs Optio	ns
Signer 1	Full Name entered at launch	Email Address ente	red at launch				×
	+	Add Participant			+ Add Me	+ Add Adva	nced

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Edit Participant Details		×
Preset:	\Xi Apply a Preset 🗙 Manage Presets	
Basic Information	Workflow Rules	
Authentication	Custom Exit Url:	
User Experience		
Email Customization	Allow participant to reassign tasks to a different person if necessary.	
Reminders Completed Notifications	Verify/Query for:	
Workflow Actions	Email Address	
Workflow Rules	□ Title	
Event Subscriptions	Organization	
Placeholders	Document Access Window:	
PDF Fields	Leave Document available 0 minutes after completed	
Launch Rules	Document Access Limit:	
Launch Display	Allow Participant to access 0 times after completed	
Launch Domains		
Launch Labels		
Save as Preset	Cancel Vpdate Participa	nt

v5.15.9 Release **Bug Fixes**

Release Date: 10/20/2022

•

[PEP-5621] ~Access/Permissions ~WorkflowActions

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 dropdown for Mobile Authentication. Please see the images below for reference to Permission Sets and the view each user would see.





ð	ac	CC	ount / p	ermission	sets	Gro	ups	U	sers		Permiss	ion	Sets	В	ulk	Perm	s	Integ	ratior	าร	Security	
		r												Ð	;	+	Add I	Permi	ssion	Set	0	
		¢ ID	Name	System-Wide	Account-Wide	Sub Group Shared	\$	•	<u></u>	₽.	7	1	1		i.	8	s 4	> 2		-84	Options	
	۶	1	Administrator	~	~	~	0	•	•	•	•		0		2	0		C	0	0	 × 	
	۶	2	Manager	~	~	~	×	×	•	•	•		0		2	0	< >	×	×	×	×	
	۶	3	User	~	~	~	×	×	•	•	• •		0	< >	•	×			×	×	× ×	
Му Со			nu . Edit Participa	ant Details										n n	achk	oord	1.14	lanort		Work X	flow Designe	er 🕞
work	(TI	(Basic Inform	nation	Auther	itication															ions Brar	
			Authenticat	ion	Туре:																	
		<	User Experie	ence	Mobile														~		Pl 🛓 Export 🖬	
Label/Descrip			Email Custo	mization	Integration N	ame:)	5	lanag	ıer	and	Us	er	view	ר				Opt	tions
Simple	les	t	Reminders			Integration		~	L	L		,	_									
			Completed	Notifications	Set perma	Integration ment phone number	for	this v	vorkfl	low												
	Par		Workflow A	ctions	Number of pl	hone number charac	ters	to le	ave u	nma	isked:											
Role F	Full N	la	Workflow R	ules	4																s Options	
<i>Му</i> Со			Edit Participa	ant Details					Jachh	A37/	I III D	ana	rte	zí wr	rkfl	low De	sinne	r III	Acco.	x	</ </t	s 🕒
work	(TI	(Preset:	韋 App	oly a Feset			*		Manage	Prese	ts								ions Brai	nds
			Basic Inform	nation	Auther	ntic tion															Pl 🛓 Export 📱	
Label/Descrip			Authenticat	ion	Туре:																Op	tions
Simple	Tes	t	User Experie	ence	Mobile														~			
			Email Custo	mization	Integration N	lame:)	٢	Adm	inis	stra	tor v	/ie	w						
H F	Par		Reminders			Integration		~		١,	lote: I											
Role I	Full N	1a	Completed	Notifications	TwilioTest	Integration		١	vorkf					vie		aru					Options	
Me	Ra	c	Workflow A	ctions	TwilioSms0 TwilioVerify			e	ave u	nma	sked:											
			Workflow R	ules	4			-														

• [PEP-5603] ~WorkflowActions

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.





MyComp		n Dashisazri - Mi Roover 17 Workflow Desimer	Account
workflo	Edit Participant Details		×
WORKIN	Preset:	Apply a Preset Manage Presets	ons Brands
Vork Label/Description Simple Test	Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Actions Workflow Rules Event Subscriptions Placeholders PDF Fields Launch Rules Launch Display Launch Labels	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 75 minutes after completed Document Access Limit: Allow Participant to access 0 times after completed	Coptions Coptions Coptions Coptions Advanced Add Documents Options Coptions
	>> ! ave successfully completed your doc	cument(s).	
Please download	a copy of your document(s) to your	computer for safekeeping. Once you have downloaded your or cument(s) you may close this	browser window.
	cess this page and download the do ipant or expires.	cument(s) listed below using the original access link for th <mark>e next 14 minutes</mark> unless the transa	ction is cancelled by
Documen	nt Status	Status Details	Options
MyCompa	any NDA Completed	This document is complete and contains all required tasks.	🛓 Download 🛛 🗹 Open

• [PEP-5428] ~ControlPanel ~Metadata ~Workflows

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.



	nu . Edit Document Detail	s	n Dachhaard - M Danarte	121 Workflow Designer	Account X	✓ Developers →
workflo	Basic Information	Metadata				ions Brands
Work Label/Description Simple Test Part	Workflow Rules User Experience Event Subscriptions Metadata Launch Rules Replace Document	Metadata 1 Name: test Value:			C Delete	Di 🛓 Export 🗃 Save
Role Full Na	Save as Preset	Add Metadata	•	Carvel 🗸 Update 🛙	Document	Options X Advanced
👗 Docur	ment Setup					Add Documents
Document Title MyCompany NE	A	File Name MyCompany_NDA.pdf			anage Tasks g Document 🚺	Options

v5.15.8 Release

Release Date: 10/6/2022

Bug Fixes

[PEP-5561] ~ControlPanel ~Workflows •

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.

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Workflow S	etup					÷
Description						Opt
mple Workflow						
Participan	t Setup					
le Full Name		Email Address		In-Person	Final Email Include Docs	Options
Signer 1 Jane Doe		jdoe@gmail.com				
	+ A	dd Participant		+	Add Me + Add	Advanced
Documen Upload Documen computer		Choose from the repository	Documents	Upload launch	the Document on t	
	ts from your	repository	Documents	launch	the Document on t	
Upload Documen computer	ts from your	repository		launch	the Document on the page a Blank Template	
Upload Documen computer Browse for docum	ts from your	repository	Document Templ 👻	Hunch	the Document on the page a Blank Template	he
Upload Documen computer Browse for docum	ts from your	repository	Document Templ *	Hunch	the Document on the page a Blank Template	he :/> Developer
Upload Documen computer Browse for docum	ts from your	repository	Document Templ *	launch + Use a	the Document on the page a Blank Template	he :/> Developer
Upload Documen computer Browse for docum yCompany Tasks Editor	ts from your	repository	Document Templ *	launch + Use a	the Document on the page a Blank Template	he /> Developer

An Error Occurred An error occurred. Please che		or details.		×
123ABC				
Signer 1 Information				
Full Name:	test			
Le Report Details				
₽.				V Upload Complet
Upload Document:	Browse for file			Vpload Complet
_	Browse for file	Processing Document(s)	10.00	✓ Upload Complet





• [PEP-5462] ~Access/Permissions ~Workflows

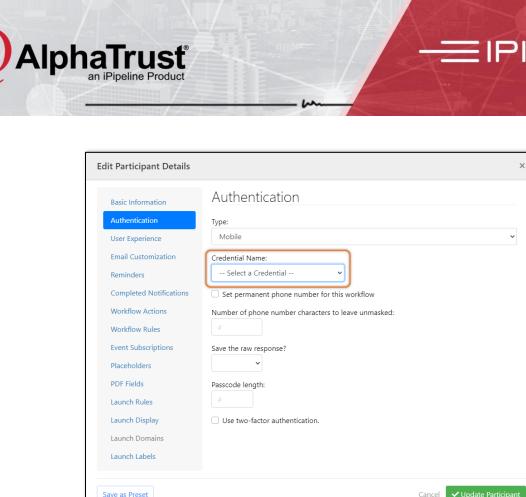
Fixed issue where two-factor authentication failed when configured as PIN/Password first and Mobile second. Authentication data had an invalid character appended to it when a two-factor mobile authentication was used. Please see the image below for the authentication settings referenced.

					_	
Edit I	Participant Details				:	×
Ba	asic Information	Authentication				
A	uthentication	Type:				
Us	ser Experience	One-time PIN/Password			~	
Er	mail Customization	Set permanent password for this workflow				
Re	eminders	 Use two-factor authentication. 				
Co	ompleted Notifications	Second-Factor Authentication				
w	/orkflow Actions	Туре:				
w	/orkflow Rules	Mobile			~	
Ev	vent Subscriptions	Credential Name:				
PI	laceholders	TwillioCreds ~				
PE	DF Fields	Set permanent phone number for this workflow				
La	aunch Rules	Send to mobile phone number:				
La	aunch Display					
La	aunch Domains	Number of phone number characters to leave unmasked:				
La	aunch Labels	4				
		Save the raw response?				
		Passrode length				
		4				
					_	_
Save	e as Preset		Cancel	🗸 Update Partici	pant	
Save	e as Preset	Passcode length:	Cancel	✓ Update Partic	ipant	

• [PEP-4792] ~ControlPanel ~UI/UX

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.

Му	Company		n Dashboard - Ut Reports	17 Workflow Des		
aco	Add Integratio				>	<
T	Integration	Integration System-Wide Integration Name:				curity O
**		Provider: Please select one		~		ptions
**				Cancel	✓ Add Integration	
		🖋 Lega				



v5.15.7 Release

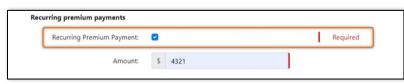
Release Date: 9/23/2022

Bug Fixes

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[PEP-5534] ~Forms

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.



• [PEP-5533] ~Documents ~Installer

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.

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Database Connection	
Server Name:	second of the second second second second
Login Type:	O Windows Authentication
Username:	Professor
Password:	Contra de Television de Contra de Co
Database:	
Trust Certificate?:	
Connection String: Show	Test Connection

• [PEP-5517] ~Transactions

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.

	🕐 Dashboard 🔟 Reports	忆 Workflow Design	ner 📕 Account 💔 Dev	elopers 🕞
reports / status	Group:	Trends Comp	letion Rates Verify D	ocument
An error occurred while attempting to void/unvoid the document. Please check the	developer console for more o	details.		×
▲ ◆ 🖾 🛱 2022-08-30 ~ 2022-09-13 🛱 Complete 👻		ent, err. Q Sea	arch	0
♦ Transaction ID ♦ Description	Created Date	♦ Status ♦	Closed Date	Options
Interse Interse <t< td=""><td>2022-09-13 11:18 AM EDT</td><td>Completed 202</td><td>22-09-13 11:19 AM EDI</td><td></td></t<>	2022-09-13 11:18 AM EDT	Completed 202	22-09-13 11:19 AM EDI	
After the search is refreshed, the transa shows the Void was successful.	ction Status	Trends Comp	letion Rates Verify D	ocument
▲ ◆ 🖾 🛱 2022-08-30 ~ 2022-09-13 🛱 Voided 🗸		ent, en: 🔍 Sea	arch ✓ Advanced	0
♦ Transaction ID ♦ Description	Created Date	Status 🔶	Closed Date	Options
1000579838 MyCompany PO: 59387	2022-09-13 11:18 AM F	EDT Voided 202	22-09-13 11:19 AM EDI	

• [PEP-5389] ~Installer

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.





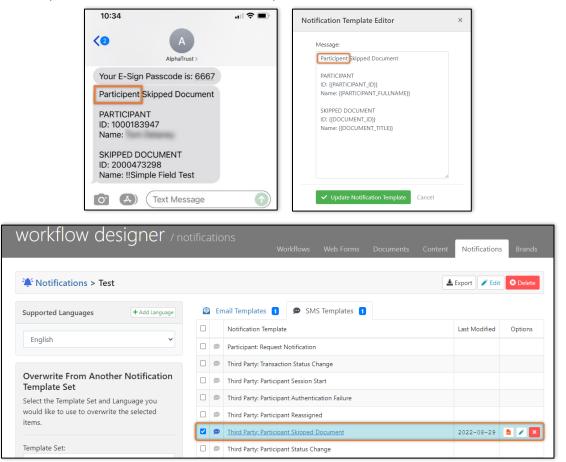
v5.15.6 Release

Release Date: 9/8/2022

Bug Fixes

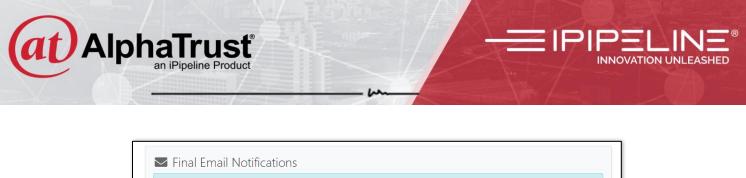
• [PEP-5433] ~WorkflowActions

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] ~WorkflowActions

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.



Send If Completed	Send If Cancelled	Send If Expired	Attach Signed Documents	
ll Name		Email Address		
ll Name		Email Address		

[PEP-5345] ~API/WebServices ٠

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

[PEP-4955] ~Signing ٠

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] ~Forms

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] ~Forms



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.

🖥 Web Form Editor	Save 🗸 Done	You are currently in "Test Mode". Please fill out and submit the form to see PDF merge information at the bottom of this page.
P POWERED BY TINY A	Test Form This is my form. Please fill it out.	Live URL for API Usage:
Default Value:	First Name :	Test Form
Default Value Text Placeholder Text:	Last Name :	This is my form. Please fill it out. First Name:
Mask:	Default Value : Default Value Text	Last Name:
Include Mask Characters	Untitled Options :	Untitled Options: Yes No
RegEx Validation: (reset)	Ves No	Save and Continue Exit
Required	Save and Continue Exit	The Text Box should show the default value <i>Default Value Text</i> and the Radio Button should default to <i>No</i>
Duplicate Field Delete Field		
nanage Field Rules	Preview	

• [PEP-5479] ~API/WebServices ~Workflows

Fixed issue where GetWorkflowLaunchRules() API method would error when calling a workflow created in a Sub Group.

• [PEP-5464] ~Workflows

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.

Import Wor	kflow	Old Format	×	Import Workflow	New F	ormat	×
Workflow	Source -	Target Policy Delivery	New New	Include/Exclude	I not have the option to . New items will still have veride existing versions.	→ Target → Policy Test	Existing
Web Forms	Source	> Target		Web Forms	Source	→ Target	
	Proposed Insured Location	Proposed Insured Location	New New	Included	Proposed Insured Location	→ Proposed Insured Location	New New
	Policy Information for Delivery	Policy Information for Delivery	New		Policy Information for Delivery	→ Proposed Insured Location	Existing
Content	Source	Target		Content	Source	Policy Information for Delivery Policy Information for Delivery	
	BGA -	BGA	• Existing	Included	BGA	PID	Existing
	Agent	Agent	Existing	Included	Agent	My Untitled Form Relevant Life Trust Form My Untitled Form Witness	C Existing
	Customer -	Customer	• D Existing	Included	DFLIC	→ DFLC	Existing
Notifications	Source	Target		Notifications	Source	→ Target	
	BGAv2	BGAv2	New New	Included	BGAv2	→ BGAv2	Existing
	BGAv2a -	BGAv2a	New New	Included	BGAv2a	→ BGAv2a	Existing
	AgentV2a	AgentV2a	New New	Included	AgentV2a	→ AgentV2a	Existing
	CustomerV2	CustomerV2	Existing	Included	CustomerV2	→ CustomerV2	Existing
0			Cancel 🗸 Save	0			Cancel 🗸 Save

• [PEP-5444] ~Workflows

Fixed issue where Participants with Input Types of Launch process will use the launcher's information for the Participant or Launch process will use the fixed Participant information entered below would cause the Launcher to



be prompted for a Phone Number on the Launch Page even though it is not required or needed. Images of the Workflow settings and Launch Page can be seen below.

Edit Participant Details	×	
Preset:	🚖 Apply a Preset 👻 Manage Presets	
Basic Information Authentication User Experience Email Customization Reminders	Launch Rules This Participant is optional at launch. Input Type: Launch process will use the launcher's information for the Participant.	
Basic InformationAuthenticationUser ExperienceEmail CustomizationRemindersCompleted NotificationsWorkflow ActionsWorkflow RulesEvent SubscriptionsPlaceholdersPDF FieldsLaunch RulesLaunch DisplayLaunch Labels	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:	
Save as Preset	Cancel Vpdate Participant	
MyCompany dashboard / workflow ter MyCompany NDA Phone Number:	Quick Stats Workflow Templates Launch Pending	evelopers 🕞
MyCompany, Inc.	Ba	ack to top 个

v5.15.5 Release

Release Date: 8/25/2022

Bug Fixes

• [PEP-5356] ~API/WebServices ~Workflows

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.

"LaunchHeading": "Launch Header Test",
"LaunchInstructions":
"LaunchSubmitButtonText": "submit button"

• [PEP-5287] ~Documents

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

• [PEP-5285] ~WorkflowActions

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

• [PEP-5279] ~WorkflowActions

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

Edit Workflow Detail	S	>
Basic Information	Event Subscriptions	
Expirations	Subscription 1	S Delete
Notifications	Туре:	
User Experience	Status Changed Event	~
Email Sender	• Webhook 🔿 Email 🔿 SMS	
Event Subscriptions	URL:	
Metadata	https://portal.alphatest.com/Catter/Dense,Netle	riCitererfelay aqu'terallı
Launch Display	Data:	
Launch Rules		
Launch Web Forms	Subscription 2	3 Delete
	Type:	Clicking the Delete button
	Skipped Document Event	 deletes Subscription 1 when it should delete Subscription 2.
	🔿 Webhook 🔿 Email 💿 SMS	
	Phone Number:	
	4102102002	
	Data:	
	CedentaName-NellaCeds	
	Add Event Subscription	Show Advanced
Save as Preset		Cancel Vorkflow

• [PEP-5257] ~Forms

Fixed issue where Web Form fields would not appear or disappear according to the Field Rules.

• [PEP-5249] ~Signatures

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





Edit Task Details	×	✓ Done
Basic Information User Experience Style Placement Workflow Actions Event Subscriptions Launch	Style Signature Image Size: Normal Color: Blue Blue Black Black Red	Task Options × Task Type: Signature Label: Actual field name in final PDF:
suscipit v vel. In cor	Cancel Vupdate Task el orcr id, dictum conseguat massa. Curabitur posuere ante justo, id iacuis es, contum ivaliis lectus et felis volutpat, eu soliicitudin erat imperdiet. Integer id congue dolor.	de9a8b07-99b2-33fa-ea16-295ce28e6b2 Participant: Signer 1 Application Type:
	prover Initials	Mouse/Touch Drawn Font-Stamped (Default) Mouse/Touch Drawn Touch Preferred Registered Image
Printed	Name:	Copy Task X Delete Task

• [PEP-5180] ~ControlPanel ~WorkflowActions ~Workflows

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

Import Workfl	ow Old	Format	×	Import Workf	low	New Format	×
Workflow				Workflow	Source	-> Target	
	Source Workflow to	Target Workflow			Policy Delivery	Policy Delivery	New
	Policy Delivery 🔿	Policy Delivery	New New	Web Forms	Source	→ Target	
Webforms					Proposed Insured Location	Proposed Insured Location	New
	Source Webform to	Target Webform		Po	licy Information for Delivery	Policy Information for Delivery	New
Included	Proposed Insured Location \rightarrow	Proposed Insured Location	New New	Content	Source	→ Target	
Included	Policy Information for Delivery \rightarrow	Policy Information for Delivery	New		BGA	⇒ BGA	Existing
Content Sets					Agent	→ Agent	Existing
	Source Content Set to	Target Content Set			Customer	⇒ Customer	♥ ◯ Existing
Included	BGA →	BGA	D Existing	Notifications	Source	→ Target	
Included	Agent →	Agent ~	D Existing		BGAv2	⇒ BGAv2	New New
Included	Customer 🚽	Customer 🗸	D Existing		BGAv2a	→ BGAv2a	New New
Notifications					AgentV2a	→ AgentV2a	New New
	Source Notification Set to	Target Notification Set			CustomerV2	→ CustomerV2	Existing
Included	BGAv2 →	BGAv2	D Existing	0			Cancel 🗸 Save
Included	BGAv2a →	BGAv2a 🗸	D Existing				
Included	AgentV2a →	AgentV2a 🗸	D Existing	I			
Included	CustomerV2 \rightarrow	CustomerV2 👻	D Existing	1			
0		Car	ncel 🗸 Save				

• [PEP-5123] ~Authentication ~ControlPanel ~Integrations

Fixed issue with inserting new Legacy Experian integration credential data.

• [PEP-5121] ~WorkflowActions

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] ~Signatures ~Transactions

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

• [PEP-4860] ~UI/UX ~Users

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.

My Company .	nc.			🙆 Dashboard 🛛	Reports 😰	Workflow Desi	igner 🛄 Accou	nt Developers
account / u:	sers	User:		Group: MyCompany, I Groups Users	Inc. Permission S	iets Bulk	Perms Integ	rations Security
Lisers > Bob Jon	es				Edit User 🛛 🖒 Re	set Password	Add Permiss	sion 🕄 Delete User
Username:	bjones	👂 Pe	rmissions 3	🗹 Emails <mark>54</mark>				<i>User</i> button, it e Users page.
Full Name:	Bob Jones	Account	t	Permission Set	Allow Open Sig	gning 💧 Al	llow Open Signing	Queue Options
Email Address:	М		pany, Inc.	Administrator	~		~	🖉 🗙
Title:	PM/Admin M		npany	Administrator	~		~	X
Organization:	MyCompany Inc		pany_Customers	Administrator 🗸		v v		×
Group ID:	Dens							
Group:	MyCompany, Inc.							
My Company .	nc.			🙆 Dashboard 🛛	🖽 Reports 🛛 😰	Workflo Desi	igner 🞚 Accou	nt Developers
account / u	sers	User:		Group: MyCompany, I Groups Users	Inc. Permission S	Sets Bulk	Perms Integ	rations Security
Type to filter Use			Group User	s v	Ł Export	✓ Bulk	Upload +	Add User
Username	♦ F	ull Name	Email Address		Sig Image	PWD Expires	🔷 Last Login	Options
L j <u>smith</u>	Joh	n Smith	1000	10.00M		never	2022-06-06	5 📲 🖹 🖊
bjones	Bob	Jones	And the Party of the Party of the			never	2022-06-15	5 📲 🖬 🖊

[PEP-2187] ~Authentication ~ControlPanel ~Workflows

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.





Edit Participant Details	×	Edit Participant Details	×
Preset:	🗮 Apply a Preset 👻 Manage Presets	Preset:	🚖 Apply a Preset 👻 Manage Presets
Basic Information Authentication User Experience Email Customization Reminders Completed Notifications Workflow Autions Workflow Rules Event Subscriptions Placeholders PDF Fields Launch Rules Launch Display Launch Domains Launch Labels	Authentication Type: Mobile Credential Name: Set permanent phone number for this workflow Number of phone number characters to leave unmasked:	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 Domains	Launch Rules This Participant is optional at launch. Input Type: Launch process will use the fixed Participant information entered below. Full Name: Email Address: Phone Number: Title: Organization:
Save as Preset	Cancel 🗸 Update Participant	Save as Preset	Cancel 🗸 Update Participan

MyCompany. Inc.
Mobile Authentication Authentication is required before accessing your documents. Step 1: Send Passcode Send the passcode to the following phone number: {{PhoneNumberMask}} should be a phone number.
Messaging rates may apply.
Send via: 💿 Text 🗭 🔿 Voice 📢
Send Passcode Now Exit
VESSAD
🔂 Dashboard 🔛 Reports 🗱 Workflow Designer 🗓 Account 🍫 Developers 🕞
dashboard / workflow templates launch
Quick Stats Workflow Templates Launch Pending Signatures
Mobile Auth as Me - With Phone Number Test Cart I Test
Phone Number: Phone Number is required for the Mobile Authentication
Start Workflow →





v5.15.4 Release

Release Date: 8/11/2022

Bug Fixes

• [PEP-5330] ~EventSubscriptions ~Security

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

• [PEP-5313] ~ControlPanel ~WorkflowActions

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.

Q. Search Results > Transaction Details: Participants Image: Company NDA 2000266094 MyCompany NDA 2000266094 Image: Company NDA PARTICIPANT: jane doe Image: Result of the second of the se	My Company			đ	Dashboard	Let Reports 🛛 🖾 Workflow De	signer 🗓 Accou	nt Devel	opers C
MyCompany NDA 2000266094 Support <	eports / status	ther:	Grou			nts Participants Ema	ils Audit Repo	ort Event	History
PARTICIPART. Jaile GOE I 1000180909 I 1000180909 I 1000180909 I I 000180909 I I I I I I I I I I I I I I I I I I I	MyCompany NDA	Details: Participants					li		ransaction
Participant ID: 1000180909 2 1000180910 John doe noreply@participant.defined Completed Status / ID: Completed / 4 Workflow Actions for Participant ID: 1000180909 Full Name: jane doe THERE IS 1 WORKFLOW ACTION IN THIS Participant Image: Completed / 4 Role: Vendor Signer Image: Completed / 2022-06-07 07:31 PM UTC Image: Completed / 4 Image: Completed / 4 Workflow Actions: 2 2 1000180910 John doe noreply@participant.defined Completed Workflow Actions: Vendor Signer Image: Completed / 4 Image: Completed / 4 Image: Completed / 4 Image: Completed / 4 Workflow Actions: Vendor Signer Image: Completed / 4 Image: Completed / 4 Image: Completed / 4 Workflow Actions: Vendor Signer Image: Completed / 4 Image: Completed / 4 Image: Completed / 4 Workflow Actions: Vendor Signer Image: Complete / 4 Image: Complete / 4 Image: Complete / 4 Workflow Actions: Vendor Signer Image: Complete / 4 Image: Complete / 4 Image: Complete / 4 Workflow Actions: Vendor Signer Image: Complete / 4 Image: Complete / 4 Image: Complete / 4	PARTICIPANT: jane doe		45.	Participant I	D Full Name	Email Address	Phone Number	Status	Options
Transaction ID: 2000266094 Status / ID: Completed / 4 Full Name: jane doe Send Request via Email: false Role: Vendor Signer Created: 2002-06-07 07:31 PM UTC Completed: 2022-06-07 07:32 PM UTC Workflow Actions: Verder Signer Workflow Actions: Verder Signer Completed: 2022-06-07 07:32 PM UTC Verderflow Actions: Verder Signer Description: Define Participant	Participant ID:	1000180909	1	100018090	2 jane doe			Completed	
Full Name: jane doe Workflow Actions for Participant ID: 1000180909 Send Request via Email: false THERE IS 1 WORKFLOW ACTION IN THIS Participant Role: Vendor Signer WORKFLOW ACTION: Define Participant Created: 2022-06-07 07:31 PM UTC Status: Completed: 2022-06-07 07:32 PM UTC Status: Workflow Actions: View 1 Participant Workflow Action Define Participant	Transaction ID:	2000266094	2	100018091	0 John doe	noreply@participant.defined		Completed	
Full Name: jane doe THERE IS 1 WORKFLOW ACTION IN THIS Participant Send Request via Email: false THERE IS 1 WORKFLOW ACTION IN THIS Participant Role: Vendor Signer WORKFLOW ACTION: Define Participant Created: 2022-06-07 07:31 PM UTC Type: Define Participant Completed: 2022-06-07 07:32 PM UTC Status: Complete Workflow Actions: View 1 Participant Workflow Action Define Participant	Status / ID:	Completed / 4	Wo	rkflow Actic	une for Parti	ripant ID: 1000180909			×
Role: Vendor Signer Created: 2022-06-07 07:31 PM UTC Completed: 2022-06-07 07:32 PM UTC Vorkflow Actions: Verw 1 Participant Workflow Actions: Verw 1 Participant	Full Name:	jane doe		Know Actic	ins for Farth	apant 10. 1000180303			~
Created: 2022-06-07 07:31 PM UTC Type: Define Participant Completed: 2022-06-07 07:32 PM UTC Status: Complete Workflow Actions:: View 1 Participant Workflow Action Define Participant	Send Request via Email:	false	T)	HERE IS 1 WO	RKFLOW ACTI	ON IN THIS Participant			
Created: 2022-06-07 07:31 PM 01C Status: Complete Completed: 2022-06-07 07:32 PM UTC Status: Complete Workflow Actions: View 1 Participant Workflow Action Define Participant	Role:	Vendor Signer	•	WORKFLOW A	TION: Define P	erticipant			
Completed: 2022-06-07 07:32 PM UTC Workflow Actions: View 1 Participant Workflow Action Define Participant Define Participant	Created:	2022-06-07 07:31 PM UTC		Type:	Define Participa	nt			
Workflow Actions: View 1 Participant Workflow Action	Completed:	2022-06-07 07:32 PM UTC		Status:	Complete				
Started Date: 2022-06-07 07:31 PM UTC	Workflow Actions:	View 1 Participant Workflow Action							
			-						
THERE IS 1 TASK IN THIS DOCUMENT Completed Date: 2022-06-07 0731 PM UTC	THERE IS 1 TASK IN THIS DOCUMENT		C	ompleted Date:	2022-06-07 07:	31 PM UTC			

• [PEP-5298] ~EventSubscriptions ~Logging

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] ~UI/UX

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.

at	AlphaTruct
140	AlphaTrust an iPipeline Product
C	 an iPipeline Product

		- un			an an Ara		
М	(y Company . Inc.	🙆 Dash	boar	d 🔟 Reports	招 , Workflow De	signer 🛄 Accou	unt Developers
	User:	Group: MyC	ompa	any Inc			
W	orkflow designer / workflows	Workflows		Veb Forms D		Content Not	tifications Brands
	Type to filter Workflows Group Workflows	5		✓ i	C 1 Imp	ort + New	Workflow
	Workflow	\$	\$	Created By	Created	Last Modified	Options
7	Sample Workflow	<	8	Rachel Keenan	2021-07-19	2022-08-08	
5	Audit Report WF	<		Rachel Keenan	2022-08-01	2022-08-01	
7	MyCompany NDA	<		Bob Jones	2022-01-04	2022-06-13	
Υ.	Sample Workflow	<		Bob Jones	2022-06-09	2022-06-09	
7	Test Workflow	<		Amanda Jones	2021-10-08	2022-03-24	
7	MyCompany PO: 22062	<		Amanda Jones	2022-01-28	2022-02-02	

<

<

<

Bob Jones

Bob Jones

Bob Jones 2022-02-02 2022-02-02

2022-01-04

2021-08-24

2021-07-27

2021-08-24

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1 - 10 of 10 items

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[PEP-5270] ~UI/UX ~Workflows •

MyCompany Buyer NDA - Internal Review

20

10 🗢 items per page

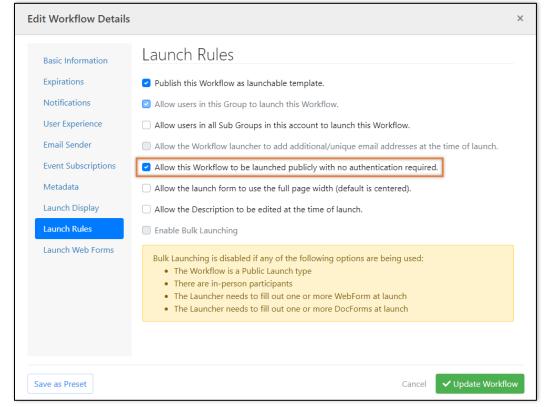
MyCompany - NDA - MDS

Mobile Number Sample Test

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

Public Define Participant Test	
Full Name:	
Signer 2 Information	
Start Workflow →	
	v5.15.3.0





• [PEP-5250] ~Forms

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.

R Tasks Editor		Edit Form Field Details		×	
₿•					
R Task Placement	*	Basic Information	Options	_	🖌 Field Options
<u>∱⊷</u> Signature		Style	Option 1 Opt	ete	Field Type:
🛃 Initials		Placement	Name:		Drop-Down List
😵 Approval		Options	Option 1		Participant: (field access) Jane Doe
'윤 Delivery			Value: Test 1		
📕 Carbon Copy			Selected		Field Name: DropdownListacb79823
DocForms Field Placement			Add Option		Actual field name in final PDF:
c⊅ Textbox					DropdownListacb79823_es_:Signer 1
Checkbox					Required
Radio Buttons			Cancel 🗸 Update F	ield	Edit More Field Properties
🖶 Drop-Down List					Copy Field
Multiline Textbox					× Delete Field

• [PEP-5248] ~Workflows

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





Signer 2 Info	ormation (optional)		
	Use optional participant?		
1	Email Address:	-	Email Address fie
	Send Workflow	 -	should not appea

Edit Workflow Details		×
Basic Information	Launch Rules	
Expirations	Publish this Workflow as launchable template.	
Notifications	Allow users in this Group to launch this Workflow.	
User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	
Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.	
Metadata	Allow the launch form to use the full page width (default is centered).	
Launch Display	Allow the Description to be edited at the time of launch.	
Launch Rules	Enable Bulk Launching	
Launch Web Forms	 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 Vpdate Workfl	ow

Edit Participant Details		×
Basic Information	Launch Rules	
Authentication	This Participant is optional at launch.	
User Experience	Allow custom email message by launcher.	
Email Customization	Input Type:	
Reminders	Launch process will use the fixed Participant information entered below.	~
Completed Notifications	Full Name:	_
Workflow Actions	Jane Doe	
Workflow Rules	Email Address:	
Event Subscriptions	jdoe@gmail.com	
Placeholders	Phone Number:	
PDF Fields		
Launch Rules	Title:	
Launch Display		





• [PEP-5208] ~Forms

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.

diam. Nullam gravida euismod nulla malesuad bibendum quis justo. Proin neque tortor, cursus e	Sed dignissim erat lacinia, sagittis turpis et, mollis a mollis. Fusce arcu nisi, fermentum ut semper in, gettincidunt in, scelerisque vitae velit. Cras arcu leo, urabitur posuere ante justo, id iacultis ex fermentum udin erat imperdiet. Integer id congue dolor.
Internal Approver Initials:	•
Signature:	_
Printed Name:	-
Date:	Nia Aldus Regelitatar indusing versions of Longb (psum.
TEST DOCUMENT - TEST	DOCOMENT - TEST DOCOME

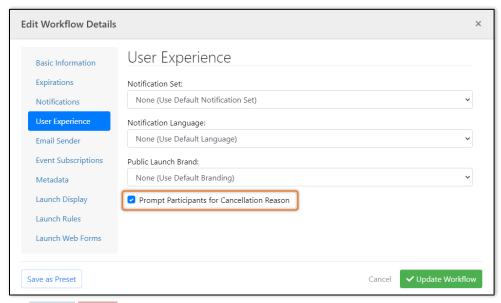
• [PEP-5105] ~Infrastructure

Added database query performance improvements.

• [PEP-5049] ~Emails ~Notifications ~Signatures ~Signing

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.

	and and a second s	
Include a message to the owner of this document transaction test		
Send Message		
	and a second	
	1	
	•	
	e. Please try and contact the owner of this transaction directly.	
An error occurred while attempting to send your email message		
An error occurred while attempting to send your email message igning Cancelled u chose not to sign this document.		



• [PEP-5030] ~Signing ~UI/UX

at) AlphaTrust

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.

☆ Old Mobile View ④		企	New Mobile View	4:
Go to Next Signature				
TEST DOCUMENT - TEST DOCUMENT - TEST	DOCUM			
Please draw your signature in the box below.	×		Lorem ipsum dolor sit amet, consec	tetur
Please rotate device to landscape mo	ode for	Pleas	e draw your signature in the box belo	ow. X
a better signing experience.		A	Please rotate device to landscap a better signing experience.	e mode for
Apply Signature			Close	
Close			Reset	
Reset		2		
🏊 Click Here to Sign				
Cancel				
< • •			< ●	

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🕞 Tasks Editor			✓ Done
·	Signer 1		Document 🗸
R Task Placement	A	pelle au agais versaria sontante la cost a na trazita sel ante tatecaran meta versatosam i tore pellerinagia-autorar digana. Prina diganian, ruta evolutianal quad tatecaran, vel es a utores tortor, di conque reli turgi gendà licosa. Fase contendorana sectifica ha chan, manima existra di sa autor Dovoc licer ante, digania gan manaria velle, ruta se a autora. Esian exister a serie al secto Quisque relitura joito di realis effottar. Pren el accurson nanc.	🖌 Task Options 🔹 🕯
🏊 Signature		Alguine et et valget Ut arte pous, facutos es no tetre opt, finites vite maran itemper tribique, major qui altrancopre valorissione, en en es valoritabilis totar ogi di obstructiona paga non es et al. Nonc connocti vericos invasteri. Das in nal la indicus verbianas qui qui as em i hisper una do la, inciciar finalisteri das in nal la indicus verbianas estas qui qui as em i hisper manada utercaper. In alguin signifis rissi, qui di elementen nunc legale au. Soi en mainnus nunc, qui valiquitar manta Sispersiona alla da consolitaria estas del la mainnus nunc, qui valiquitar manta Sispersiona alla da consolitaria estas da consolitaria.	Task Type:
<u>×ℓ</u> Initials		Present subtravague som ex impedie manne. Sod diprison end botike, sught harper et molte dann. Naham panela examed naka malexaala molte. Pozos anzu end, hernertam di antegor is, bestati et de uit al dictora mongani mana. Canata panela panela panela panela panela sustati et de uit al dictora mongani mana. Canata possena de uit al la valta est menten vel in convalte lecta et felis valupat, es acolicitade enel insperiet i mager el congandidor.	Initials
😵 Approval		I understand what I read: Witness of signature [] [initials] Participant 1 Signature Witness Signature	Label:
7 Delivery		Participant 1 Printed Name Wilness Printed Name	
📔 Carbon Copy		Signature 1 Date Witness Signature Date	Actual field name in final PDF: c2875869-cc00-adc8-cc06-ef7c684725a4
📕 Add Signature Block Data			Participant:
Printed Name		Table understand what I read.	Signer 1
Signature Date		Participant 2 Signature Participant 2 Protect Name	Application Type:
Title		Signature 2 Date	Mouse/Touch Drawn
Organization			Font-Stamped (Default) Mouse/Touch Drawn
Email Address			Touch Preferred

• [PEP-5029] ~ControlPanel ~Workflows

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.

ontent Notifications Brand Back ⊉ Launcher ∲ API ≹ Export @ S Optic
Optic
Email Include Docs Options
• • 💌 💌
Me + Add Advanced
Quick !
X mailAddress must
€-Sack &Test ≠Ean
eld is missing





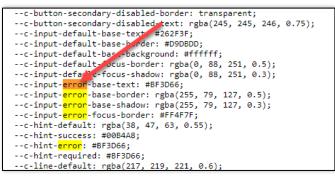
v5.15.3 Release

Release Date: 7/28/2022

Bug Fixes

[PEP-5158] ~Documents ~Signing

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.



v5.15.2 Release

Release Date: 7/18/2022

Bug Fixes

[PEP-4982] ~WorkflowActions •

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.

		Edit Participant Details	×
Edit Participant Details Basic Information Authentication User Experience Email Customization	x Workflow Actions Action 1 Oner Type: Define Another Participant	Edit Participant Details Basic Information Authentication User Experience Email Customization Reminders Completed Notifications	X Authentication Type: One-time PIN/Password Set permanent password for this workflow Use two-factor authentication. Second-Factor Authentication
Reminders Completed Notifications Workflow Actions Workflow Rules Event Subscriptions Placeholders PDF Fields Launch Rules Launch Rules Launch Display Launch Labels	Perticipant to Define: Signer 2 v Full Name v spitons Phone Number Title Corganization Coustom Enail Message Coustom Page Content Add Workflow Action	Workflow Actions Workflow Rules Event Subscriptions Placeholders PDF Fields Launch Rules Launch Display Launch Domains Launch Labels	Type: Mobile Credential Name: TwillioCreds Set permanent phone number for this workflow Number of phone number characters to leave unmasked: Swe the raw response? No Passcode length:
Save as Preset	Cancel 🗸 Update Participant	Save as Preset	Cancel 🗸 Update Participant

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Define Participant		PIN/Password Field is missing.
Full Name:		PIN/Password:
Mobile Number:		
	Update Participant Cancel	

[PEP-4981] "BrandSets "ContentSets" "Notifications" UI/UX

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:	5.	Enter your username in the format "domain\user" or "user@domain".	
Language:	English -		
	✓ Add Content Cancel		

• [PEP-4970] ~AuditReport ~UI/UX

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.





Profile Editor		×
Basic Information	ocalization	
Password	ate Format: MM/DD/YYYY V	
	me Zone: (UTC-05:00) Eastern Time (US & Canada)	
0		Cancel 🗸 Update Profile
Document Audit	Report	My Company , Inc.
Ocument Audit		My Company , Inc.
	itle: NDA Internal Version	My Company , Inc.
🖹 Document Ti	itle: NDA Internal Version nt ID: 2000470298	My Company , Inc.
Document Ti Documen Transactio	itle: NDA Internal Version nt ID: 2000470298	My Company , Inc.
Document Ti Documen Transactio T	itle: NDA Internal Version nt ID: 2000470298 nt ID: 2000266094	My Company , Inc.
Documen Transactio T Sta	itle:NDA Internal Versionnt ID:2000470298on ID:2000266094Type:PDF Document	My Company , Inc.

• [PEP-4969] ~WorkflowActions

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.





My Company . Inc.			é	Dashboard	내 Reports 🛿 Workflow De	signer 📱 Accou	nt Devel	opers 🕞
reports / status	User	Grou	ip: MyCompany Transactior		nts Participants Ema	ils Audit Repo	ort Event	History
Q Search Results > Transaction MyCompany NDA 2000266094	Details: Participants					ji I	Void T	ransaction
PARTICIPANT: jane doe		١Ē	Participant II	D Full Name	Email Address	Phone Number	Status	Options
Participant ID:	1000180909	1	100018090	jane doe			Completed	
Transaction ID:	2000266094	2	100018091	John doe	noreply@participant.defined		Completed	
Status / ID:	Completed / 4	Wo	rkflow Actio	ns for Partic	cipant ID: 1000180909			×
Full Name:	jane doe							
Send Request via Email:	false	Т	HERE IS 1 WOI	RKFLOW ACTION	ON IN THIS Participant			
Role:	Vendor Signer	\$	WORKFLOW AG	TION: Define Pa	rticipant			
Created:	2022-06-07 07:31 PM UTC	_	Type:					
Completed:	2022-06-07 07:32 PM UTC		Status:	Complete				
Workflow Actions:	View 1 Participant Workflow Action		Description: Started Date:	Define Participa 2022-06-07 07:				
THERE IS 1 TASK IN THIS DOCUMENT		6	ompleted Date:					
🛃 Signature: NDA Internal Version								

• [PEP-4949] ~Signing ~SMS

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

• [PEP-4948] ~EventSubscriptions ~UI/UX

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.

Subscription 2	
Туре:	
Skipped Document Event	~
○ Webhook ○ Email ● SMS	
○ Webhook ○ Email ● SMS Phone Number: Test	Enter your username in the format "domain\user" or "user@domain".

• [PEP-4931] ~Access/Permissions ~Installer

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] ~Documentation ~Installer

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] ~Emails ~Notifications ~Signing

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.

	on										Opti
st carbo	on										
P a	articipant	: Setup									
Reorder	Role	Full Name	E	mail Addı	iress	In-	Person	Final Email	Include Docs	C	ptions
1	Identifier	Full Name entered at launch.		Email A	Address entered at launch					≢	🖌 🗙
2	Client	Full Name entered at launch.		Email A	Address entered at launch					ŧ	💉 🗙
		1	+ Add Partic								dvanced
				ipant				+ Add	Me +	Add Ad	ivanceu
∽ Tasks	Editor			lpant				+ Add	Me +	_	✓ Done
∽ Tasks	Editor	All Partici			🖬 Enable DocForms 🔹		~	Add	Me +	_	
∽ Tasks	: Editor	All Partic			Exatle Ductorns	_	Ŷ	+ Add	Me +	_	
⊷ Tasks ≁ Ta		All Partici			Enable Docidentes 🔒		Ŷ	+ Add	Me + /	_	
		All Partice		· ✓	Placeholder/Position		Particip		Me + /		
% Ta	asks	•	Placeholder Type	× 1			Particip				

v5.15.1.1 Release

Release Date: 7/13/2022

Bug Fixes

• [PEP-5084] ~ EventSubscriptions

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

v5.15.1 Release Bug Fixes

Release Date: 6/30/2022

• [PEP-5032] ~EventSubscriptions

Fixed issue where Webhook Event Subscriptions are being sent without information of what changed for the transaction and any transaction information. Please see the image below of the Event Subscriptions setting referenced and an example Webhook Event Subscription.





Edit Workflow Details		×
Basic Information	Event Subscriptions	
Expirations	Subscription 1	O Delete
Notifications	Туре:	
User Experience	Status Changed Event	~
Email Sender	• Webhook O Email O SMS	
Event Subscriptions	URL:	
Metadata		
Launch Display	Data:	
Launch Rules		
Launch Web Forms	Add Event Subscription	Show Advanced
Save as Preset		Cancel Vpdate Workflow
🖹 Document S	Action Listener Relay Event	* Add Documents
Document Title	testing To ©@	Manage Tasks Options
	Client IP: GET: email= .com	
Final Email N	Post:	

• [PEP-4991] ~ContentSets ~SMS

Fixed issue where SMS notifications would not send when using a custom notification template. Please see the image below for an example of a custom SMS notification template.





My Company ∞		📾 Dashboard 🖽 Reports 👪 Workflow Designer 📗 Account 🌾 Developers 🚱
workflow designer / notifications	Uier Group MyCompany, Inc.	Workflows Web Forms Documents Content Notifications Brands
Type to filter Notifications Notification Template Set Name SendedmatTen susset MyCompany, Inc. Notifications > BobJonesSet		Constraint Constrain
Supported Languages + Add Language	🙆 Email Templates 🛐 🗭 SMS Templates 🚺	
English Select the checkbox of one or more Notification Page Types from the list to allow edit initialization.	Notification Template Participant: Resource Notification Third Party: Transaction Status Change Third Party: Participant Session Stat Third Party: Participant Session Stat Third Party: Participant Reassigned Third Party: Participant Reassigned Third Party: Participant Status Change Third Party: Participant Status Change Third Party: Document Status Change Third Party: Document Status Change Third Party: Document Certified/Sealed Third Party: Task Status Change Third Party: Task Status Change	Notification Template Editor Last Modified Options Message: 2022-04-19 Image: Im
MyCompany, Inc.		Back to top ↑
Dashboard Reports Cale Status Status		Carrier Former Carrie

• [PEP-4986] ~Reports ~Transactions ~UI/UX

Fixed issue where an error would display after closing a pending transaction from the Status Reports page. Please see the image below for the steps and error message seen.

		Status Trends Completion Rates Verily Doc
Advanced Search		LExport Options
Transaction Creator	Search Text	Status
😩 Group Transactions	✓ 1000237669	Any Status
Date Type	Date Range	Test Transactions
Created	♥ 2022-06-03 ~ 2022-06-17	🖹 🚊 Exclude Tests
Search Location		
This Group + Sub Groups	✓ Q Search	D Reset Filters
Transaction ID		♦ Group ♦ Created Date ♦ Status ♦ Close Tran
1000237669		Automation 2022-06-16 02:30 FX EDT Pending
An error occurred while attempting to close the transaction	› Please check the developer console for more details.	Status Trends Completion Rates Verify Doc
An error occurred while attempting to close the transaction Advanced Search	 Please check the developer console for more details. 	Status Trends Completion Rates Vering Loo
Advanced Search	n. Please check the developer console for more details. Search Text	
Advanced Search		La Export Options Advanced
Advanced Search Transaction Creator	Search Text	Status
Advanced Search Transaction Creator Group Transactions	Search Text v 1000237669	Status Any Status
Advanced Search Transaction Creator Croup Transactions Date Type Created	Search Text V 1000237669 Date Range	Status Any Status Test Transactions
Advanced Search Transaction Creator Croup Transactions Date Type Created	Search Text V 1000237669 Date Range	Status Any Status Test Transactions
Advanced Search Transaction Creator Transactions Date Type Created Search Location	Search Text 1000237669 Date Range 2022-06-03 ~ 2022-06-17	Status Any Status Test Transactions





• [PEP-4946] ~API/WebServices ~Transactions

Fixed issue where calling the UpdateTransactions API function would result in a database connection error.

• [PEP-4944] ~ EventSubscriptions

Fixed issue where Participants with multiple *Status Changed Event* Event Subscriptions would receive two notifications instead of one when utilizing two subscription methods. Please see the image below of the Event Subscriptions setting referenced.

				🙆 Dashb	oard 🔟 Reports	招 Workflow	w Designer 📙	Account	Developers 🕞
vorkflow des	signer / workf			Group: Workflows					
Workflow Setu	qu						← Back 📝	Launcher « > API 🔒	Export Save Options
1 2 Signer 1 FL 1 3 Signer 2 FL	Name ull Name defined by anothe ull Name defined by anothe		Email Address Email Address defi Email Address defi		innaret - 141 Dannet	In-Person	Final Email	Include Docs	Options
Workflov Workflo Use Use Use Use Use Use Use Use Use Use	articipant Details sic Information thentication er Experience ail Customization minders mpleted Notifications orkflow Actions orkflow Actions ant Subscriptions ceholders F Fields anch Rules anch Display	Subscriptio Type: Status Chan Webhook Phone Numbe Subscription Data: CredentialW Subscriptio Type: Status Chan	iged Event C Email SMS er: SMS Phone Number arme= < EnterYourCredH n 2		~		Delet	API	s Brands