



# 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 Web Forms 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.





# v5.18.13.1 Release

Release Date: 8/30/2024

### **Bug Fixes**

### • [PEP-7361] ~ControlPanel ~Forms ~UI/UX

Fixed issue where Web Form number fields, with a regex and min/max values, would not have all validation work as expected. Number fields do not support regex validation, and we instead use browser native number input to limit values to numbers. Please see the images below for the referenced settings.

My <b>Company</b> . Inc.	😵 Dashboard 🔐 Reports 🛿 Workflow Designer 🗒 Account 🌾 Developers  RK
workflow designer	Workflows Web Forms Documents Content Notifications Brands
Web Forms > My Untitled Form	Test Device :: Leport :: 🚝 Rules 🖍 Edit Save
Add Fields	
Formatted Fields	Untitled Form
Number	This is my form. Please fill it out. Number:
Currency	Save and Continue Exit
Date	
Email Address	

MyCompany	D. Dachboard M Reports 材 Workflow Designer 🗏 Account 😗 Davelopers	RK
Form Editor	Field 1: "Number" [number]	<
Display Validation	Display Field Type: Number ~ Label: Number	
	P   Min Value:   3   100   Field Width:   3   Q   Default Value:   Placeholder Text:	
Pe	Cancel Save Changes	j





### v5.18.13 Release

Release Date: 8/15/2024

#### **Bug Fixes**

### • [PEP-8344] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where when utilizing the *Allow Multiple Document Uploads* feature with the *Document Upload Match RegEx* option, documents that matched successfully would not be shown with an Upload Status. Please see the images below for the referenced settings and an example.

			×
workfle	Basic Information	Launch Rules	s Brands
S Work	Expirations	Publish this Workflow as launchable template.	lit 🕞 Save
	Notifications	Allow users in this Group to launch this Workflow.	
💄 Pa	User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Role	Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	Options
Signer 1	Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.	<ul> <li>×</li> </ul>
	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.	lvanced
	Launch Rules	☑ Allow Multiple Document Uploads	
De De	Launch Web Forms	Enable Bulk Launching	
Du			d Documents
workfle	Edit Document Details	5	×
	Basic Information	Launch Rules	s Brands
Se Work	Workflow Rules	Require unique document upload at launch (do not use template on file).	lit 🕞 Save
	User Experience	This Document is optional at launch.	
Pa	Event Subscriptions	Allow the launcher to customize the document title.	
Role	Metadata	Allow the launcher to fill out document fields as "Launcher" Role.	Options
Signer 1	Launch Rules	Document Upload Match RegEx:	· ×
	Replace Document	NDA	
			lvanced
	Save as Preset	Cancel 🗸 Update Docume	ent
1y <b>Compa</b> i	<b>ny</b> . Inc.	😗 Dashboard 🔟 Reports 🚺 Workflow Designer 📮 Acc	ount <b></b> Developers
Workflows	> MyCompany PO: 2206	2 🛛 🖓 Launch 🖉 🕹 Exp	port 💠 🖊 Edit 🕞 S

Optional

ls Upload

Manage Tasks

🗹 Tag Document 🚺

Tag Document 1

🗹 Tag Document 1

🗹 Tag Document 🚺

File Name

MyCompany\_NDA.pdf

Sample Document1.pdf

✓ Add Document(s)

Test Document.pdf

NDA JH.pdf

Document Setup

Document Title

MyCompany NDA

Sample Document1

Test Document

Reorder

1

t

t

1 4 NDA JH

\* Add Documents

Options



Workflow Templates > Launch		📱 Tes
MyCompany PO:	22062	
Multiple Document Uploads	Drag & Drop your files or <u>Browse</u>	
	MyCompany_NDA - Copy.pdf 55 103	*
	NDA JH.pdf 63 18	۲
	Sample Document.docx 16 63	8
	Test Document1.docx 16 KB	۲
🗄 MyCompany NDA	Upload Status: MyCompany_NDA - Copy.pdf	
Sample Document1	Upload Status: Sample Document.docx	
Test Document	Upload Status: Test Document1.docx	
🖹 NDA JH	Upload Status: NDA JH.pdf	

### • [PEP-8222] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where when utilizing the *Allow Multiple Document Uploads* feature with the *Document Upload Match RegEx* option, Zip files that contained more than one document that matched would not show the details of the multiple matches as it should. Please see the images below for the referenced settings.

INNOVATION UNLEASHED





workfle	Edit Workflow Details							×	
WULKII	Basic Information	Launch R	ules						s Brands
Se Work	Expirations	Publish this Workflow as launchable template.							it 🕞 Save
	Notifications		this Group to launch this						
Pa	User Experience		all Sub Groups in this acc		ch this Work	flow			
	Email Sender		kflow launcher to add ad				a time of launch		
Role	Event Subscriptions		kflow to be launched put						Options
Signer 1	Metadata		ch form to use the full pa				4.		
	Launch Display		cription to be edited at th	-		licaj.			vanced
	Launch Rules		Document Uploads						
	Launch Web Forms	Enable Bulk La							
上 Do			unening						
-	Edit Document Details							×	
workfle									
	Basic Information	Launch R	ules						
Se Work	Workflow Rules	🗹 Require uniqu	e document upload at lau	unch (do not	use templat	e on file).			it 🕞 Save
	User Experience		t is optional at launch.						
Pa	Event Subscriptions	Allow the laur	cher to customize the do	ocument title.					
Role	Metadata	Allow the laur	cher to fill out document	t fields as "La	uncher" Role				Options
Signer 1	Launch Rules	Document Uploa	d Match RegEx:						
	Replace Document	NDA							
									lvanced
	Save as Preset					Cancel	✓ Update Document	t	
24									^
Му <b>Сот</b>			2	Dashboard	Reports	4 Workflow D	esigner 🖪 Account	• Develo	pers RK
Service Servic	ows > MyCompany PO: 220	062				🗹 Launch	📕 Test 💠 🚣 Export 💠	/ Edit	Save
	aurea and Cature								
👗 Do	ocument Setup							≫ Add	Documents
Reorder	Document Title	File Nam	e		Optional	Is Upload	Manage Tasks	0	ptions
<b>‡</b> 1	MyCompany NDA	MyCo	mpany_NDA.pdf				🖸 Tag Document 1		
<b>‡</b> 2	Sample Document1	Samp	le Document1.pdf				🖸 Tag Document 🚺		×
<b>‡</b> 3	Test Document	Test D	ocument.pdf				🖸 Tag Document 🚺		×
<b>‡</b> 4	NDA JH	NDA	JH.pdf				🖸 Tag Document 🚺		
			✓ Add Docume	ent(s)					





### • [PEP-8195] ~Forms ~Workflows

Fixed issue where if a Launcher Participant exited and did not submit a required Web Form, the Transaction would not correctly cancel. Please see the images below for the referenced settings and an example.

Edit Workflow Details	×
Basic Information	Launch Web Forms
Expirations	Publish this Workflow as launchable template.
Notifications User Experience Email Sender	Web Forms added here will require the launcher of the Workflow to fill them out (in the order listed below) prior to emails being sent out to any Participants. <b>Note: This feature is only available for non-public (authenticated) launch templates.</b>
Event Subscriptions	Web Form 1 OPelete
Metadata	Web Form:
Launch Display	Form Fields Test
Launch Rules	Add Web Form
Launch Web Forms	
Save as Preset	Cancel Vorkflow
My <b>Company</b> , Inc.	⑦ Dashboard
ashboard / workflow ter	mplates Quick Stats Workflow Templates Pending Signatu
Please sign in the order listed below	N.
	Rachel Keenan
	start your signing process
Signer 1: Ja	
Please click here to	
	Form Fields Test
Signer 2: Jo	Dnn Option 1: This is a test comment above the radio button This is another test Test test test test test thtps://test.com
← Back to Launch Form	Status: Married Single Divorced
MyCompany, Inc.	Option 2: Launcher is required to fill out a WebForm, but clicks on the <i>Exit</i> button.





reports / status		Transactio	n I	Doc	cuments Par	rticipants	Emails Aud	lit Report	Event Histo	ry
Q Search Results > Transaction D	Status of the W						articipant Status is		3 🖶 (	2
		rticipant Status a				-			Cancel Transaction	on
PARTICIPANT: Rachel Keenan			1	lΞ	Participant ID	Full Name	Email Address	Phone Number	Status	Optio
Participant ID: Transaction ID:	100000175			1	100000	Rachel Keenan	Assess By pairs a		Completed	
	Completed / 4	Workflow Action	ns for P	Parti	icipant ID:	86773		×	Pending	
Full Name: Email Address:	Rachel Keenan	THERE IS 1 WOR			ION IN THIS Partici	pant			Pending	
Title: Organization:	Catoria Sacas	Type: Status:	Custom	_						
-	false	Description: URL:	Form Field	ids Te:	st					
Completed Transaction Notification Type: Certification Type:		Started Date: Completed Date:								

# v5.18.12 Release

# Release Date: 8/1/2024

**Bug Fixes** 

# • [PEP-8176] ~ControlPanel ~Workflows

Fixed issue where reassigned Participants did not have the signer location task properly reassigned. Please see the image below for the referenced settings.

Edit Participant Details		×
Basic Information	Workflow Rules	
Authentication	Custom Exit Url:	
User Experience		
Email Customization	Custom Session Timeout Url:	
Reminders		
Completed Notifications	Allow participant to reassign tasks to a different person if necessary.	
Workflow Actions	Verify/Query for:	
Workflow Rules	NOTE: these may be automatically queried for if a participant's tasks requires this data.           Full Name	
Event Subscriptions	Initials	
Placeholders	Email Address     Title	
PDF Fields	Organization Signing Location	
Launch Rules	Document Access Window:	





### • [PEP-8174] ~ControlPanel ~Forms ~UI/UX

Fixed issue where regex validation would not work for the Number field in Web Forms. Please see the image below for the referenced settings.

workflow de	signer/web	forms	Workflows Web Forms Documents Content Notifications Brands
BWeb Forms > M	ly Untitled Form		▲ Test
Add Fields Formatted Fields	~		Untitled Form
Number	::		Number:
Currency Date			Save and Continue Exit
Email Address		Form Editor	Validation
Social Security Numbe	er II	To Validation	RegEx Validation:  (reset) /\d+\$
📚 MyCompany, Inc.			RegEx Error Message:     (reset)       Please enter a number.     : to top ↑       Required     : to top ↑
			Cancel 🗸 Save Changes

### • [PEP-8163] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where, when utilizing Public Launch in combination with the Bulk Document Upload feature, if multiple documents matched conditions for a single document upload it would apply the match to both documents when it should only match for the first document. Please see the image below for the referenced settings.





workfle	Edit Workflow Details		×
	Basic Information	Launch Rules	s Brands
Se Work	Expirations	Publish this Workflow as launchable template.	it 🕞 Save
	Notifications	Allow users in this Group to launch this Workflow.	
<b>P</b> a	User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Reorder	Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	Options
<b>‡</b> 1	Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.	<ul> <li>×</li> </ul>
<b>‡</b> 2	Metadata	Allow the launch form to use the full page width (default is centered).	
<b>‡</b> 3	Launch Display	Allow the Description to be edited at the time of launch.	
	Launch Rules	Allow Multiple Document Uploads	
	Launch Web Forms	Enable Bulk Launching	lvanced
workflu	Edit Document Details	S	×
workfle			x s Brands
	Basic Information	Launch Rules	s Brands
workfle	Basic Information Workflow Rules	■ Require unique document upload at launch (do not use template on file).	
ST Work	Basic Information Workflow Rules User Experience	<ul> <li>Caunch Rules</li> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> </ul>	s Brands
St Work	Basic Information Workflow Rules User Experience Event Subscriptions	<ul> <li>Launch Rules</li> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> </ul>	s Brands
St Work Pa Reorder	Basic Information Workflow Rules User Experience	<ul> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> </ul>	s Brands
Vork Pa Reorder	Basic Information Workflow Rules User Experience Event Subscriptions Metadata	<ul> <li>Launch Rules</li> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> </ul>	s Brands
Vork Pa Reorder 1 2	Basic Information Workflow Rules User Experience Event Subscriptions Metadata Launch Rules	<ul> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> </ul>	s Brands
Vork Pa Reorder	Basic Information Workflow Rules User Experience Event Subscriptions Metadata Launch Rules	<ul> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> </ul>	s Brands

# • [PEP-8133] ~Forms ~Workflows

Fixed issue where a first Participants' participant-specific DocForm values are not mapped or shown on a DocForm when a second Participant enters to complete the same DocForm. Please see the image below for the referenced settings.



Tasks Editor			🗸 Don
L Jane Doe	✓ Enable DocForms	NDA 🗸	->
Vivamus commodo lacinia mollis. Aenean ut tellus ves aliquam, nisi sit amet pretium posuere, sapien ex ek diam. Praesent imperdiet leo quis hendreirit conse blandit. Quisque libero velit, scelerisque nec augue risus imperdiet venenatis. Praesent et vestibulum le Aenean sagittis, dolor vitae maximus pharetra, ligula nulla. Etiam scelerisque enim id ligula laoreet dictum sodales sed, lobortis sed massa. Vivamus volutpat si purus turpis, vitae congue neque euismod a. Sed con potenti. Integer convallis, felis tempus euismod accumsan, lo justo eu augue. Vivamus sollicitudin lacus at nisi fing pelientesque auctor aliquam. Proin dignissim, nulla ve id congue nisit turpis gravida lacus. Fusce commodo ri Donec libero anle, dignissim quis maximus vitae, fin Quisque rutrum justo id mollis efficitur. Proin id accum	aftend lacus, a pellentesque lactus velit sit amet ctetur. Phasellus rhoncus felis at risus dictum a, convalis consequat metus. Duis feugiat sed builta rhoncus tristique orci non vestibulum. purus modeste justo, a maximus sem dolor vitae sit amet quis ex. Sed tellus risus, consectetur at it amet ante rutrum ultrices. Suspendisse porta imodo odio ac felis suscipit feugiat. Suspendisse rem enim vehicula mauris, vitae accumsan eros pila, sit amet bibendum metus vestibulum. Proin tistibulum aliquet pharetra, velit est ufrices tortor, sus sed nibh luctus, maximus euismod ex auctor. bus ac acque. Etiam auctor nec sen eu mattis.	Click to edit a Field List Click to edit a Field. (Double-click)	<ul> <li>All Fields</li> <li>for all properties)</li> <li>1</li> </ul>
Signature: Printed Name:	[DropdownListbc61b259]	The second Participant completed fields from the when completing their a	e first Participar
Date:	[TextBoxcd407d90_es_:Customer]	First Participant (Jane D fields before the secon	

### • [PEP-8040] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where when updating a Workflow in the Control Panel, a user could exit the screen while changes are being saved. The changes would not be saved and the Workflow would end up in an errored state that could not be recovered from. Updated UI to include full screen saving modal to ensure changes to a Workflow are saved properly. Please see the image below for an example for the new saving modal.

My <b>Company</b>	🕫 Dashbaard III Panarte 🕇	Workflow Designer 🖷 Account 🌾 Developers 🔐
workflow dosignor	Saving Workflow	
workflow designer/workflows		Documents Content Notifications Brands
Workflows > MyCompany NDA	$\bigcirc$	Launch 📕 Test 💠 🗮 Export 💠 🖉 Edit 💽 Save
💄 Participant Setup	Large workflows may take a while; do not close the browser or navigate away until it's completed.	
Reorder Role Full Name		n-Person Final Email Include Docs Options
I         Vendor Signer         Full Name enter	ed at launch Email Address entered at launch	

### • [PEP-7896] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where transaction description placeholders accepted participant index but not participant role. Added role to placeholder participant identifier for transaction description. New placeholders include: ParticipantFirstName, ParticipantLastName, ParticipantFullName, ParticipantTitle, ParticipantOrganization, and ParticipantEmailAddress. Please see the image below for the referenced settings and an example.





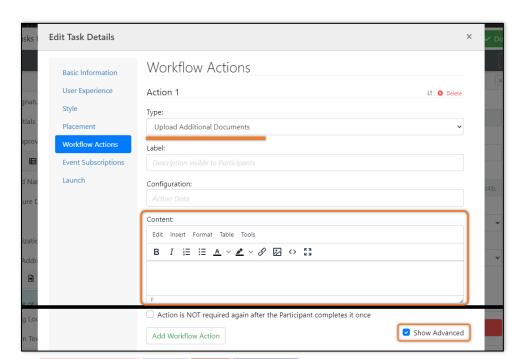
workflow	design	e <b>r</b> / workflov	VS	Workflo	ows Web Forms	Document	s Content	Notification	ns Brands
St Workflows	> MyComp	any NDA				Z Launch	Test 🔛 🕹	Export 💠 🖉 E	Edit Save
2 Partic	ipant Se	etup							
Reorder Role	•	Full Name		Email Address		In-Person	Final Email	Include Docs	Options
<b>1</b> Ve	endor Signer	Full Name e	ntered at launch	Email Address entered	at launch				🖌 🗙
<b>‡</b> 2 Si	gner1	Full Name e	ntered at launch	Email Address entered	at launch				<ul> <li>×</li> </ul>
				1					
MyComp	<b>n</b> u.			n Dachh	oard III Reports	17 Workflow De	esioner 🕮 🗛	Count () Dev	velopers RK
workflow	Edit Work	low Details		•				×	
WORKHOW			Basic Inform	nation				ation	ns Brands
Service Workflow	Basic Info							<i>#</i> 5	dit 🕞 Save
	Expiration Notificati		Workflow ID:						
	User Exp								
💄 Parti			Label: MyCompany NDA						
Role	Email Ser		Mycompany NDA					cs	Options
Vendor Signe	Event Sul	bscriptions		k to use the above Label as the					🖌 🗡
	Metadata	3	MyCompany NDA: {	{ParticipantFullName: Sign	er1}}				
	Launch D	isplay						A k	dvanced

### • [PEP-7538] ~Workflows

Fixed issue where a daylight savings name was being used for a time zone instead of the standard name causing problems when trying to identify the correct time zone.

### • [PEP-7297] ~API/WebServices ~ContentSets ~Documents ~WorkflowActions ~Workflows

Fixed issue where task-specific content could no not be specified for Upload Additional Documents Workflow Actions. Added a custom content option for Upload Additional Documents Workflow Action. Please see the image below for the referenced settings.



• [PEP-6984] ~API/WebServices ~Signing ~UI/UX ~Workflows

at AlphaTrust

Fixed issue where Participants were not able to skip optional documents when the Prompt Participants for Cancellation Reason setting was enabled. Please see the image below for the referenced settings.

workfle	Edit Document Details	5	×	
WULKIN	Basic Information	Workflow Rules		s Brands
S Work	Workflow Rules	S optional (document can be skipped by Participants during signing)		🖉 Edit
	User Experience	Do not allow forms fields to be flattened		
Pa	Event Subscriptions	Allow as email attachment		
Reorder	Metadata	Include Audit Report With Completed Documents		Options
	Launch Rules	Document Retention in Days:		
	Replace Document	Purge document in         N/A         days after status is in Completed status.		
+ 3				
workfle	Edit Workflow Details		×	
	Basic Information	User Experience		s Brands
Se Work	Expirations	Notification Set:		🖋 Edit
	Notifications	None (Use Default Notification Set)		
Pa	User Experience	Notification Language:		
Reorder	Email Sender	None (Use Default Language)		Options
<b>‡</b> 1	Event Subscriptions	Public Launch Brand:		
<b>‡</b> 2	Metadata	None (Use Default Branding)		
	Launch Display	Default Time Zone:		
	Launch Rules	Use Default Group Time Zone 🗸		
	Launch Web Forms	Prompt Participants for Cancellation Reason		lvanced
	Save as Preset	Cancel 🗸 🗸 Update Workfld	w	

INNOVATION UNLEASHED





### Bug Fixes

### • [PEP-8229] ~Emails ~Workflows

Fixed issue where access order checks on Participants would cause emails to not send out as expected.

### • [PEP-8119] ~Forms

v5.18.11.2 Release

Fixed issue where a required attribute on a radio button was not properly applied to a PDF upon saving within the Control Panel. Please see the image below for the settings referenced and an example.

R Tasks Editor	✓ Done
Jane Doe	e 🗸 🗹 Enable DocForms 🖺 New Patient Form 1 👻
DocForms Field Placement	Met[Sprature]
Standard Fields 🗸 🔀 🔀	Signer (Signature) Utane Deel New Patient Form
Textbox	Date: Full Name: Phone:
Checkbox	Date of Birth: Gender: Email:
	Edit Form Field Details X
Drop-Down List	Basic Information Validation
🗉 Multiline Textbox	Style Required
😭 Other Tasks	Placement Validation
Forms / Actions	
₩ Delivery	Cancel V Update Field Plesse indicate if you are here because of:  An on the job injury An auto accident A home injury

### v5.18.11.1 Release Bug Fixes

# Release Date: 7/12/2024

### • [PEP-8196] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where fields would not appear on screen when a participant was assigned a Define Another Participant task. Please see the referenced settings in the image below.

INOVATION UNI FASHED





ly <b>Com</b>	pan <u>y</u>	Inc.	🕐 Dashboard 🔟	! Reports 12 W	orkflow Design	er 🗒 Account	
Workflo	ows > M	yCompany NDA - COP	Y	<b>2</b> L	aunch 🛛 🗛 Tes	t 🗄 🛓 Export	💥 🥒 Edit 🕞 Save
💄 Par	ticipa	nt Setup					
Reorder	Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
<b>‡</b> 1	Me	Jane Doe	jdoe@mail.com				🌫 🖌 🗙
<b>‡</b> 2	Signer	1 Full Name defined	by Email Address defined by				≋/ / ×
<b>t</b> 3	Carl	dit Participant Details				×	
Do:	cum	Basic Information Authentication User Experience Email Customization Reminders	Workflow Actions Action 1 Type: Define Another Participant			Jî O Delete	dd Advanced
Reorder D	Documei New F	Completed Notifications	Participant to Define: Signer 1 🗸				Options
<b>‡</b> 2	Blank	Workflow Actions Workflow Rules	<ul> <li>Full Name v options</li> <li>Email Address v options</li> <li>Phone Number</li> </ul>				
		Event Subscriptions Placeholders	Title Organization				
		PDF Fields	Authentication  Two-Factor Authentication  Custom Email Message volume				
		Launch Rules	Customize Page Content				
🖂 Fina	al Fi	Launch Display	Add Workflow Action		🗆 s	how Advanced	

### v5.18.11 Release Bug Fixes

# Release Date: 6/27/2024

### • [PEP-8156] ~Forms ~WorkflowActions

Fixed issue where Workflow Actions would be incorrectly skipped when DocForms was enabled. Please see the image below for the settings referenced.





Tasks Editor			✓ Done
*	Signer 1	✓ 🔽 Enable DocForms 📱 Test	✓
🔍 Task	Placement		✤ Task Options
୬ <sub>≥</sub> Signature <u>×</u> Initials		Lorem ipsum dolor sit amet, consectetur adipiscing elit	Task Type: Signature
Approval	ature Block Data	Ventra controllations and the avenual table ventilation multiple results (articles on Conse ellegent, this care and parts processors) are an endered lives, a particulation of the end of the endermal parts processors are an endered lives, a particulation of the end bend. Consets beins with Consetsors are que a consets conset conset method. The height tare there is consets are an endermal parts are an endermal to an endermal trans. The height tare there is any endermal parts are an endermal to an endermal to an endermal target target to constant the endermal parts and the endermal parts are and the endermal parts and there is an endermal part of the endermal parts and the endermal parts are and the endermal constant therein any endermal parts are an endermal parts and the endermal parts. Constant therein a endermal parts are and the endermal parts are and the endermal parts and the endermal parts are an endermal parts and the endermal parts and the endermal parts. The endermal parts are an endermal parts are and the endermal parts are and the parts are an endermal parts are an endermal parts are an endermal parts are and the endermal parts. The endermal parts are an endermal parts are an endermal parts are and the endermal parts are an endermal parts are an endermal parts are an endermal parts are an endermal parts are are an endermal parts are an endermal parts are an endermal parts are an endermal parts are are an endermal parts are an endermal parts are an endermal parts are an endermal parts are are an endermal parts are an endermal parts are are an endermal parts are an endermal parts are are an endermal parts are an endermal parts are an endermal parts are an endermal parts are are are an endermal parts are are an endermal parts are an endermal parts are are are are an endermal parts are are are are are an endermal parts are	Label:
Printed Name Signature Date Title Organization		<text><text><text><text></text></text></text></text>	Actual field name in final PDF: de9a8b07-99b2-33fa-ea16-295ce28e6b2 Participant: Signer 1
Edit Task Details		×	Application Type: Font-Stamped (Default)
Basic Information User Experience Style Placement	Workflow Actions Action 1 Type: Select Action Type	Iî ● Delete Required	Optional Edit More Task Properties Clone Task
Workflow Actions Event Subscriptions Launch	Add Workflow Action	Show Advanced	× Delete Task
		Cancel 🗸 Update Task	

### • [PEP-8148] ~Forms

Fixed issue where the Social Security Number Field Mask would not work as expected and would fill in the spaces after the Participant entered the first number. Please see the image below for the referenced settings and an example.



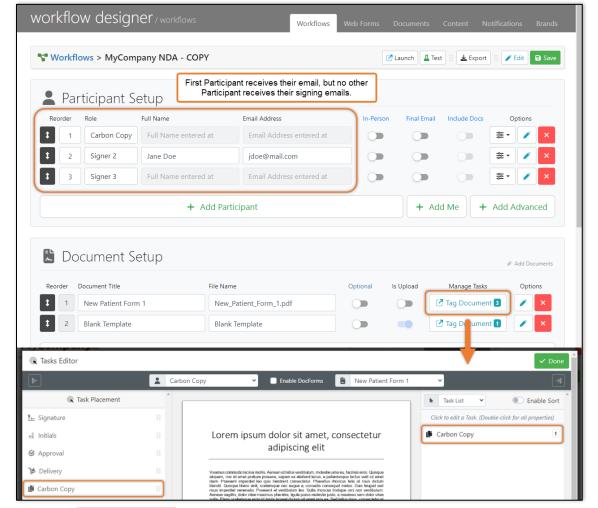


MyCompany. Inc.	Ø Dashboard Ⴞ Reports ば Workflow Designer 閉 Account  → Developers RK
workflow designer/web forms	Workflows Web Forms Documents Content Notifications Brands
B Web Forms > My Untitled Form	Test Device :: 🛃 Export :: 🔁 Rules 🖌 Edit 🖬 Save
Add Fields	Lintitle d. E e wee
Formatted Fields	Untitled Form This is my form. Please fill it out.
Number	
Currency	Save and Continue Exit
Date	Form Editor Field 1: "SSN" (sin) Y
Email Address	Validation
Phone Number	Display Validation Validation Mask
Social Security Number	X00-30-300X
	Include Mask Characters
Untitled Form	RegEx Validation:         (reset)           ^(\(d(3)-7\d(2)-7\d(4))XXX-XX-XXX)         (reset)
This is my form. Please fill it out.	RegEx Error Message: (reset)
SSN: XXX-XX-XXXX	Please enter a valid SSN. Ex: 123-45-6789
Save and Continue	xit Required
	r Notific Brands Cancel V Save Changes

# • [PEP-8143] ~Emails ~Workflows

Fixed issue where Participant emails fail to send if they are after a Carbon Copy Participant. Please see the image below for the referenced settings and an example.





### • [PEP-8141] ~API/WebServices

Fixed issue where API calls would allow for double @ symbols in email addresses. Added validation check for double @ symbols in email addresses.

### • [PEP-8137] ~Documents ~Forms

Fixed issue where checkboxes in the Documents editor would be wiped after adding more than one. Please see the image below for more information.

workflow designe	<b>r</b> / documents	Workflows	Web Forms	Documents Conte	ent Notifications	Brands
Documents > MyCompa	After clicking on the Save butto checkboxes are wiped from		Dptimize	🖌 Flatten	kport 📰 🚅 Rename	Save
Add Form Fields	K-			Field Prope	erties	⇒
AB Textbox	line lorem ipsum	i dolor sit amet, co	nsectetur	Select field(s)	to edit.	
Checkbox		adipiscing elit				
Radio Buttons	aliquam, risi st arret pretum p diam, l/reesent imperdet leo blandit. Quisque libero veit, sc nsus imperdet venenabs. Prae	. Aenean ut tellus vestibulum, moleste uma osuere, sapien ex eletand lacus, a pellente quis hendrent consecteur. Thesellus rhon elersque nec augue a, convallis consequal sent et vestibulum ieo. Nalla moncus tras mus pharetra, liguia purus molestie justo, a	sque lectus veilt sit amet cus tells at nsus dictum metus. Diuls teugrat sed que orci non vestibulium.			

NNOVATION UNLEASHED





# v5.18.10 Release

## Release Date: 6/14/2024

### **Bug Fixes**

•

# [PEP-8123] ~Forms ~Workflows ~WorkflowActions

Fixed issue where Web Forms, that were Workflow Actions on Document tasks, would be triggered out of order. The Participant would see all Web Forms at once instead of with each correlated task.

R	Tasks Editor				✓ Done
k		Signer 1	✓ 🗹 Enable Do	cForms 🖺 Test	<b>~</b>
	Edit Task Details			×	🖌 Task Options 🛛 🖈
Prir Sign Title Org	Basic Information User Experience Style Placement Workflow Actions Event Subscriptions Launch	Workflow Actions Action 1 Type: Web Form Web Form: Test Form Add Workflow Action		17  Cence Cancel Update Task repetite Hidge is corgee.exit	Task Type: Signature Label: <i>Actual field name in final PDF:</i> de9a8b07-99b2-33fa-ea16-295ce28e6b2 Participant: Signer 1
IP Ac	ddress		Signature:	<del>.</del> .	Optional
Docu Task	ument ID ID		Date:		Edit More Task Properties

# v5.18.9 Release

# Release Date: 6/7/2024

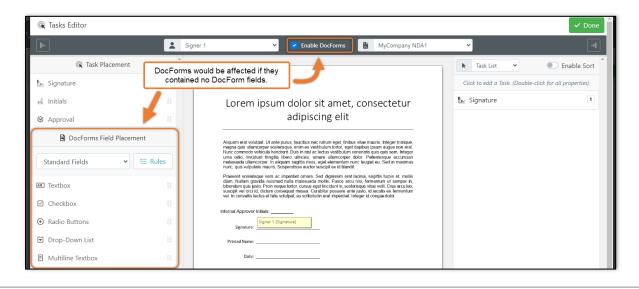
### **Bug Fixes**

#### [PEP-8110] ~Forms ~Workflows •

Fixed issue where a Participant could not navigate to the signing page if the Workflow used DocForms that contained no DocForm fields. Please see the image below for more details and an example.







# v5.18.8 Release

# Release Date: 5/23/2024

**Bug Fixes** 

#### [PEP-8048] ~Forms ~WorkflowActions ~Workflows •

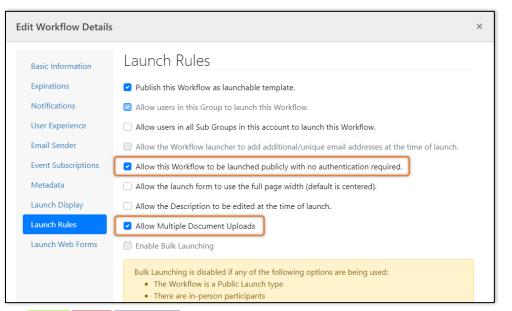
Fixed issue where Task Workflow Actions would be skipped in certain scenario(s). Please see the image below for an example and the referenced settings and steps to add a Workflow Action to a Task.

Tasks Editor			✓ Done
*	Jane Doe	Y 📄 Enable DocForms 🖺 New Pat	ient Form 1  ✔
1 🔍 Task Pla	icement		🖌 Task Options 🛛 🖈
l Signature ∞ℓ Initials		State         New Patient Form           Data         Patient         Patient           data         Construction         Patient           data         Construction         Patient           data         Construction         Patient           data         Construction         Patient           data         Maximum Patient         Maximum Patient	Task Type: Signature
<ul> <li>Approval</li> <li>Add Signatur</li> <li>Printed Name</li> </ul>	re Block Data	De poular kalle navaral "Die Die (ryn beforder prompty one allers, Byterbeler Hene yn anni Onsynatio Market "Die Die No. Waard"	Label: Actual field name in f <sub>r</sub> al PDF:
s Edit Task Details		×	Participant:
Basic Information	Workflow Actions		Jane Doe 🗸
C User Experience Style E Placement	Action 1 Type: Web Form	ئا Obies پ	Application Type: Font-Stamped (Der ult)
Event Subscriptions	Web Form: My Untitled Form Add Workflow Action	<ul> <li>Show Advanced</li> </ul>	Optional     Edit More Task Properties
		Cancel 🗸 Update Task	<ul> <li>Clone Task</li> <li>X Delete Task</li> </ul>

#### [PEP-8038] ~ControlPanel ~UI/UX ~Workflows •

Fixed issue where workflows that could be launched publicly could not upload multi-file zip files. Please see the images below for the referenced settings.





### • [PEP-8034] ~Emails ~UI/UX ~Workflows

Fixed issue where emails for Carbon Copy Participants would not be sent. Please see the image below for the referenced settings.

🕞 Tasks Editor				✓ Done
	L Signer	2 Company NDA	~	
Task Placement	^		► Task List ►	Enable Sort
🏊 Signature			Click to edit a Task. (Double	e-click for all properties)
<u>∗</u> ℓ Initials		Lorem ipsum dolor sit amet, consectetur	🕒 Carbon Copy	1
Approval		adipiscing elit		
₩ Delivery		Viramus commodolacina molts. Aenean utitellus vestabutum, melestie uma eu, facitissi eros. Quisque atiquam, risi sit amet prelium posaire, saparin ux elefand lacus, a peliantesque lectus velt sit amet		
📕 Carbon Copy		diam. Present imperiate leo ques herdreint consecteur. Presentes transcente les at ress dictum blandt. Ganzeure lisero varis, socientespa en canage a conventis consequial malas. Data legadi sad resus emperates venentes. Presente et evisitarium leo. Nate nances transpage con nor vestibuirum. Aceine spotte, socie velocatione et en la consequiera de la consequiera de la consequiera de la consequiera de presente a consequiera de la consequi		

# v5.18.7 Release

## Release Date: 5/14/2024

Bug Fixes

### • [PEP-7991] ~Notifications ~Workflows

Fixed issue where participant reminder notifications were not being sent out. This was seen in versions 5.18.0 through 5.18.6.

### • [PEP-7977] ~Emails ~UI/UX ~Workflows

Fixed issue where Carbon Copy tasks, and related emails, would be completed prematurely and not according to the access order. Please see the images below for an example and more information.

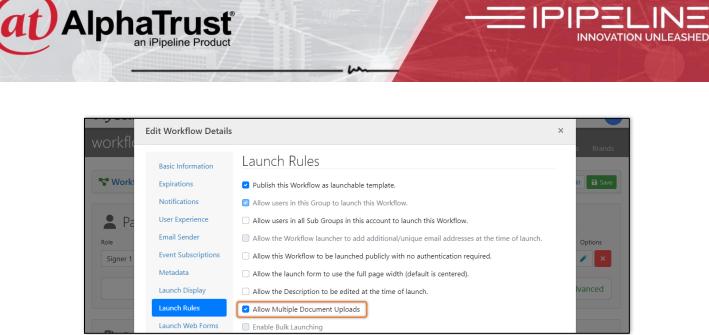




			Workflows We		nt Notifications	Brand:
<b>S</b> V	Vorkflows > MyCc	ompany NDA - COPY		🗹 Launch 🗳 Test 💠	🛓 Export 💠 🖊 Ed	it 🕞 Save
	Participant	Setup				
Re	eorder Role	Full Name	Email Address	In-Person Final Emai	Include Docs	Options
ŧ	1 Me	Jane Doe	jdoe@mail.com			🖉 🗙
ŧ	2 Signer 1	Full Name defined by ano	Email Address defined by and	other		🖌 🗙
‡	3 Carbon Cop	Full Name entered at laun	Email Address entered at lau	nch		<ul> <li>×</li> </ul>
Tasl	ks Editor					🗸 Don
←		2 Carbon Copy	👻 🔲 Enable DocForms 📑	New Patient Form 1		_→[
	🔍 Task Placem		Me [Signature]	Task List	• E	nable Sort
		5	igner 1 (Signature) [Me (Signature] New Patient I	Form Click to edit a Task. (	Double-click for all p	roperties)
		Da Da	86 FullName Prove 86 of Binhe Gender Einali áreas Copy State Zip	📑 Carbon Copy		1
		Em	ngbyer Name, Addeux, & Phene: MyCompany Inc., 1234 Company Street, 890-123 you'ver bath inscarce? So No (jes, phene pire empoy new, oldres, 8 phene lelve	3-4567		
	DocForms Field DI	acement W	on you saan a Oimpestor befors? 🛛 Yes 📄 Na 🤍 Where?			
a	•		Dashboard 🔟 Reports 💆 W	orkflow Designer 🖪 Accoun	, de parte	
	y <b>Compan</b>	Y. Inc. 😵		orknow besigner 🐂 Account	t 💔 Develope	ers Rk
	y <b>Compan</b> Dorts	<b>y, inc.</b> 🗸	ion Documents Participa	_		History
		-	ion Documents Participa	_		
rep	oorts	-		_		History
rep	DORTS Search Results	Transaction Detain Transaction Detain Tranpany NDA - COPY		ants Emails Audit Re	eport Event	History
rep	Search Results	Transaction Detain pany NDA - COPY 000	ils: Participants Carbon Copy participant a	ants Emails Audit Re	eport Event	History
rep Q	Search Results MyCom 10006110 Participant ID	Transaction Detail	ils: Participants Carbon Copy participant a <i>Completed</i> status until the	ants Emails Audit Re and task should not be in a second participant sig	eport Event	: History
reŗ Q ₽≟	Search Results          MyCom         10006110         Participant ID         1000584224	Transaction Detail s > Transaction Detail pany NDA - COPY 000 Full Name ane Doe	ils: Participants Carbon Copy participant a <i>Completed</i> status until the Email Address	ants Emails Audit Re and task should not be in a second participant sig	eport Event	: History

# • [PEP-7974] ~Documents ~Workflows

Fixed issue where large document uploads did not list the matched document name. Please see the images below for the referenced settings.



lyCon	npany.mc.	Ø [	Dashboard 🔟 Reports	ZI Workflow De	signer 🖪 Account	Develop	ers
Work	flows > MyCompany PO: 220	062		🖸 Launch 🛛	Test 💠 Export 🗰	/ Edit	🖬 Sav
L D	ocument Setup					≯ <sup>h</sup> Add D	ocuments
Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Opt	ions
1	MyCompany NDA	MyCompany_NDA.pdf			🖸 Tag Document 1	1	×
1       1       2	MyCompany NDA Sample Document1	MyCompany_NDA.pdf Sample Document1.pdf			Tag Document     Tag Document	/	×
				•		/ /	

### • [PEP-7954] ~WorkflowActions ~Workflows

Fixed issue where Forms/Actions Workflow Actions, that were assigned to a task, would be skipped incorrectly. Please see the image below for the referenced settings and an example.

R Tasks Editor						🗸 Done	-
*	Sig	ner 1 🗸 🗸	Enable DocForms	yCompany NDA1	~	<b>→</b>	
R Tas	sk Placement	A		•	Task List 🗸	Enable Sort	1
<u>b</u> ₂ Signature					lick to edit a Task. (Double-c	click for all properties)	1
🛃 Initials		Lorem ipsu	Im dolor sit amet, consectetu adipiscing elit	ir 🗳	Forms / Actions	1	1
Approval				-			
R Tasks Editor	Edit Task Details					× V Done	e
k	Basic Information	Workflow Ac	tions			-1	
R	Workflow Actions	Action 1	The Participant should be ro	outed to the	🕼 😒 Delete	×	
<u>b</u> Signature	Event Subscriptions	Type:	Workflow Action, but is	is not.			
🛃 nitials	Launch	Web Form			Ŷ		
S Approval		Web Form:				perties	
DocFc		My Untitled Form			~		
One or more F		Add Workflow Action			Show Advanced	d	

### • [PEP-7935] ~UI/UX ~Workflows

Fixed issue where after hitting the Save button, it would become prematurely clickable again even though a Workflow is still being saved. Please see the image below for more information.





Му <mark>Сот</mark>	pany.inc.	🙆 Dasht	oard 🔟 Reports ট	4 Workflow Designer	🛱 Account		lopers RK
workflc	ow designer / workflows	Workfl	ows Web Forms				
S Workf	lows > MyCompany NDA			🗷 Launch 🚨 Test	II 🛓 Export	:: 🖊 Edit	t Save
💄 Pa	rticipant Setup						
Role	Full Name	Email Address		In-Person Fina	I Email Inclu	de Docs	Options
Signer 1	Full Name entered at launch	Email Address entered at launch					🖌 🗡

### • [PEP-7910] ~Forms ~Workflows

Fixed issue where Forms/Actions Web Form Workflow Actions, that were assigned to a task, would be skipped incorrectly and route the user to the Exit Page. Please see the image below for the referenced settings and an example.

🔍 Tasks Editor			✓ Done
k	💄 Si	gner 1	NDA1 -
🔍 Ta	sk Placement	A	► Task List   ● Enable Sort
b- Signature			Click to edit a Task. (Double-click for all properties)
🛃 Initials		Lorem ipsum dolor sit amet, consectetur adipiscing elit	Forms / Actions
Approval			
R Tasks Editor	Edit Task Details		× Vone
M	Basic Information	Workflow Actions	V
€ Caracture	Workflow Actions	Action 1 The Participant should be routed to	the 11 O Delete
	Event Subscriptions	Type: Workflow Action, but is not.	
👱 Initials	Launch	Web Form	~
S Approval		Web Form:	perties
DocFc		My Untitled Form	· · · · · · · · · · · · · · · · · · ·
One or more F		Add Workflow Action	Show Advanced

### • [PEP-7906] ~Workflows

Fixed issue where a Participant could not reassign a task and would instead see an error. Please see the image below for the referenced setting.

Edit Participant Details		×
Basic Information	Workflow Rules	
Authentication	Custom Exit Url:	
User Experience		
Email Customization	Custom Session Timeout Url:	
Reminders		
Completed Notifications	Allow participant to reassign tasks to a different person if necessary.	
Workflow Actions	Verify/Query for:	
Workflow Rules	NOTE: these may be automatically queried for if a participant's tasks requires this data.	
Event Subscriptions	Full Name Initials	

v5.18.6 Release

Release Date: 4/23/2024





### **Bug Fixes**

### • [PEP-7943] ~Emails ~Workflows

Fixed issue where multiple emails are sent to carbon copy recipients. Please see the image below for the referenced settings.

R Tasks Editor				✓ Done
	Signer 2	- Enable DocForms 🖹 MyCompany NDA	Ý	<b>-&gt;1</b>
🛞 Task Placement	<b>^</b>		► Task List ►	Enable Sort
<u>I≁</u> Signature			Click to edit a Task. (Double	e-click for all properties)
<u>*</u> Initials		Lorem ipsum dolor sit amet, consectetur	🕒 Carbon Copy	1
😵 Approval		adipiscing elit		
🎾 Delivery		Vivamus commodo lacinia moltis. Aensan ut tellus vestibulum, molestie uma eu, facilisis eros. Quisque atquam, nisi sit amet pretium posuere, sapien ex elefiend facus, a petientesque lectus velt sit amet		
📕 Carbon Copy		dam. Present imperded los quis herichent consociatur. Presentos fronces teles al reas dictam biendi Cassegue bero veli, scienteração na capacita e convelis consequent meito. Das legados est nuas imperided vereneitas. Presente el vestidadam los Naña informas trategue con nor vestidadam presente entre el consecuencia entre el consecuencia de la consecuencia de las estas presentes entre el consecuencia de las estas de las estas entre entre entre el consecuencia de presentes entre el consecuencia de las estas de las estas entre el consecuencia de las estas consecuencias en entre . Elema sectemente entre el consecuencia de las estas entre entre entre el consecuencia de las estas entre entre entre el consecuencia de las estas de las estas entre entre entre el consecuencia de las estas entre entre entre en		

### • [PEP-7928] ~ContentSets

Fixed issue where when using custom content sets the acknowledgement Positive and Negative buttons would use the default text versus the custom content set. Please see the image below for the referenced settings.

workflow designer / content			Workflows Web Forms Documents Content	Notification	s Brands
Content > Customer Content				Le Export	Rename
Supported Languages + Add Language			Content Page Template	Last Modified	Options
			Access Denied		
English			Authentication (Common)		
			PDF Signing	2023-12-01	
Select the checkbox of one or more Content Page Types from the list to allow edit			Reassign Participant		
Content Editor			+	×	s Brands
Section:					
Buttons > Acknowledge > Positive				~	Rename
Icon placeholders are p			this section using the format. Available icon options can be found at vhich can be found here ) will display like this: <b>.8</b> =		Options
English Content:					
{{icon:at-approval}} I Have Reviewed	This D	)ocur	nent		
Select the Keep open after update			Cancel 🗸 Updat	e Content	

### • [PEP-7921] ~Notifications ~Workflows

Fixed issue where emails would not send out properly to a Participant if they only had a carbon copy task. Please see the image below for the referenced settings.



R Tasks Editor				✓ Done
	Signer 2	- Enable DocForms 🖺 MyCompany NDA	v	
R Task Placement	A		► Task List ►	Enable Sort
l <u>≁</u> Signature			Click to edit a Task. (Doub	le-click for all properties)
<u>*</u> Initials		Lorem ipsum dolor sit amet, consectetur	🕒 Carbon Copy	1
😵 Approval		adipiscing elit		
₩ Delivery		Vivamus commodo lacinia molis. Aeroan uttellus vestbutum, moleste uma eu, facilisis eros. Quisque alquam, nisi si amet pretium posuere, sapien ex elefend lacus, a pelientesque lectus velit si amet		
📕 Carbon Copy		diam Praesent imported lao çus henderir consecteur Plasaillas rhoncas feits at russ dictum biendt Querge lebro vell, sciencinge me augura e convolis consequella mets. Dai leaguial sed rusus impartiel veneratis. Praesent et vestitutum lao. Nalla rhoncas tristique orci non vestitutum. Anexen segits, doitor vilee maxmas pharteria jugla puos molisiej justo, a maximus semi dobr vilee malla Filma seletarus en initi divida lovenel dictum al anter aixe as Sel files trists conservitiva rite.		

### v5.18.5 Release

Release Date: 4/11/2024

### **Bug Fixes**

### • [PEP-7924] ~Forms

Additional fixes for text stamping in a specific customer document.

### v5.18.4 Release

### Release Date: 4/5/2024

### **Important Notes:**

Version 5.18.5 reverted behavioral changes seen with text searching when used with text stamping. Please reference the 5.18.5 release notes for more information.

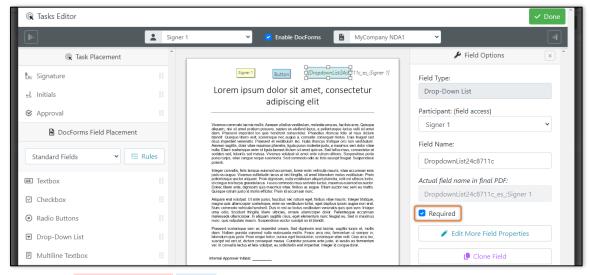
#### **Bug Fixes**

### • [PEP-7884] ~API/WebServices ~Forms

Fixed issue where updating existing documents were only overwriting part of the previous document if the previous document was larger in size causing them to be corrupt.

### • [PEP-7854] ~Forms

Fixed issue where required DocForm fields would not validate properly and a Participant could proceed to the next signing step even without answering the required fields. Please see the example below of a required field.



[PEP-7853] ~API/WebServices ~Forms



Fixed issue where transactions created through the Rest API would not have the DocForm field rules applied. Please see the image below of an example of DocForm field rules.

Tasks Editor				🗸 Done
<b>*</b>	Signer 1	🗸 💽 Enable DocForms 📔 MyCompany NDA	A1 ~	-*
🔍 Task P	lacement		▶ Field List ▼	All Fields
🦕 Signature		Signer 1 Button [DropdownList24c8	Click to edit a Field. (Double-click	for all properties)
L Initials		Lorem ipsum dolor sit amet, consectetur	RadioButton119ea188	1
🕉 Approval		adipiscing elit	DropdownList24c8711c	1
DocForms Fi	ield Placement	Viverrus commodo lacinia molis. Aereen ut tellus vesibulari, molestie uma eu, facilisis eros. Quisque alquem, tris si en anti proteim posseno, specie no edicional tacvo, a potentisque locita velt si amol dam. Presenti mercifet lo cuja hondrati consociatur. Pisadella honcas fels al trisus datun bitandi. Quisque labero velt, scelerisque nece sugue a, connellas consequel metas. Dus tengais sed risus impedie venentas. <sup>2</sup> mesente et vestibularia ne. Juata noncus tributago con neu vestibulari.		
Standard Fields	<ul> <li>✓ E Rules</li> </ul>	Itsia ingenerat vennanti, Theseneri et vestituira ils. Julia rhoncas trataga oni no vestituiam. Anama augusto Sodav vias insuranzi patientiti, giuta giaro molekale jado, an transma sen oddo vitas podeles sod, koortis os marsus Avenans velabal sit anent ante rationa littores. Sanoendase pode no Lupe, vieta organ engas estancias. Sectoramoto da cas tels suscita frances. Sanoendase pode podeles sod, koortis os marsus. Avenans velabal sit anent ante rationa littores. Sanoendase pode podeles sod, koortis os marsus. Avenans velabal sit anent ante rationa littores. Sanoendase pode podeles sod, koortis os marsus. Avenans velabal situationa da cas tels suscita frances. Sanoendase pode podeles sod, koortis os marsus ante ante rationa littores. Sanoendase pode podeles sod. Sanoendase sectores de constante ante rationa anter alterna da cas tels suscita frances. Sanoendase podeles sod. Sanoendase sectores de constante avenante anter alterna da cas tels suscita frances. Sanoendase pode podeles sod. Sanoendase sectores de constante anter alterna da cas tels suscitas frances. Sanoendase pode podeles sod. Sanoendase sectores de constante avenante avenant		
R Tasks Editor	Field Rules Editor		×	V Developers
k-	Rule		Duplicate	→
🙊 Tas				All Fields
⊵ Signature	IF RadioButton119ea188	8_es_:Signer 1 👻 is 🛛 Button 1	<ul><li>+</li></ul>	ck for all properties)
2 Initials	THEN require 🖌 Dro	opdownList24c8711c_es_:Signer 1 🗸 🕂		1
Approval	Add Rule			1
DocForm	- Add Indie			
		C;	ancel 🗸 Save Changes	
Chandland Clable				

### • [PEP-7505] ~Logging

Fixed issue where logging request validation was creating errors when API logging was turned off.

### v5.18.3 Release Bug Fixes

# Release Date: 3/29/2024

• [PEP-7867] ~Signing ~Transactions ~Workflows

Fixed issue where Transactions with a carbon copy task assigned to the first Participant would get stuck in a Pending status. Please see the images below for additional details and an example.





My <b>Company</b> .inc.		😵 Dashboard 🔟 Reports	12, Workflow De	esigner 🖷 🗛	count <b></b> De	velopers
workflow designer/workflows		Workflows Web Forms	s Document	s Content	Notificatio	ns Brands
Workflows > NDA				·· *	Export II 🥖	Edit 🖬 Save
Participant Setup						
Reorder Role Full Name  I MyCompany Internal Full Name en	Email Address	entered at launch	In-Person	Final Email	Include Docs	Options
		entered at launch				
	+ Add Participant		+	Add Me	+ Add A	dvanced
🕈 Document Setup					x <sup>†</sup>	Add Documents
Document Title MyCompany NDA	File Name MyCompany_NDA.pdf		ls Upload	Manage		Options
	✓ Add Docume					
Tasks Editor	Company Internal	ms 🖁 MyCompany NDA	~			✓ Do
R Task Placement			- <b>k</b>	Task List 🔹		Enable Sc
Signature			Click	to edit a Task. (i	Double-click for	all properties)
Initials	Lorem ipsum dolor sit ar	met, consectetur	🕒 Ca	rbon Copy		(
Approval	adipiscing	elit			1	
DocForms Field Placement One or more Participants must be Form Fillers in order to add/edit Form Fields in your document. Enable DocForms	Vivarus: commodo lacnia molis: Annean ut tellus vestibulur alquam, reis al ment protium posunor, sagera es eleiford biendt. Quisque libero vellt, solerisogin en caugina e, con risus: impetidat venenais. Praesent el vestibulum los Nu Annean agaits, doi vella moratorus pateratir, ligual purus nulla. Etem solerisogue entimi el gala lacorest dictam si tam purus turgs, vitae congue negue eutismod a. Sed commodo potenti.	Phasellus rhoncus feils at risus dictum valis consequet metus. Duis feugial sed la rhoncus tristique orci non vestibutum nolosifeij usto, a maximus sem dobr vitae at quis ex. Sed tellus risus, consactetur at a relar uturum utificas. Suspendioses porta dob ac fells suscipit leugiat. Suspendisse		Task for th	e first Parti	cipant
Conter Tasks	Integer convaits, fells tempus existmed accumsan, horme re justo eu aquie Vinemus solicitudina locus at nist fingilla, si pellentesque auctor aliquam. Proin digrissim, nulla vestivului id congue risk lurgis gravida lacus. Fusce commodor fruis se Donce lation ante, dignissim quis maximus vitao, finbitus a Quisque nutrum justo la molis efficient. Priori di accumsan n	im aliquet pharetra, velit est ultrices tortor, t nibh luctus, maximus euismod ex auctor.				
Forms / Actions	Task for the second	rtor, eget dapibus ipsum augue non erat. stibulum venenatis quis quis sem. Integer mcorper dolor. Pellentesque accumsan				
Delivery	Participant Praesent scelerisque sem comperidet omare. Sed digme dam. Nutiling ravida eusing brunta matesuada motis. F bibendum quis pisto Prion nique totor, custis egetriculor suscipti vel oro id, dictum consequat massa. Curabituri po vel in convaris licitus etter violapia et us oblicitudin enti mi					
	vel. In convallis lectus et felis volutpat, eu sollicitudin erat in	nerdiet. Integer id conque dolor				

• [PEP-7866] ~Signing ~Transactions ~Workflows

Fixed issue where Transactions containing Participants that have multiple carbon copy tasks assigned to them would get stuck in a Pending status. Please see the images below for additional details and an example.





		;		Workflows	Web Forms	Document	s Content	Notificatio	ons Brands
Se Workflows > NDA							II 🛓 Ex	rport II 🥖	Edit 🕞 Save
Participant Setup									
Role Full Name			Email Address			In-Person	Final Email	Include Docs	Options
MyCompany Internal Full Name ent	ered at	launch	Email Address entered	at launch					
		<b>+</b> Ac	d Participant			+	Add Me	+ Add A	Advanced
🖹 Document Setup								Ŕ	Add Documents
Reorder Document Title			ile Name		Optional	Is Upload	Manage 1		Options
MyCompany NDA			MyCompany_NDA.pdf				Tag Docu		
2 NDA Internal Version			NDA_Internal Version.pdf				🖸 Tag Docu	iment 1	
			✓ Add Docume	nt(s)					
🙊 Tasks Editor									✓ Done
<b>⊮</b>	<u>*</u>	MyCompany Internal	Y Enable DocForr	ns 🖺 MyCom	pany NDA	~			*
⊮- ( Task Placement	<b>*</b>	MyCompany Internal	Enable DocForr	ns 🖪 MyCom	pany NDA	_	'ask List 🗸 🗸		
R Task Placement	<b>*</b>	MyCompany Internal	▼ Enable DocForr	ns 🖹 MyCom	pany NDA	<b>k</b> 1	ask List 🗸		Enable Sort
	-					Click 1			Enable Sort
			▼ ■ Enable Docforr m ipsum dolor sit arr adipiscing e	et, consecte		Click 1	o edit a Task. (Do		Enable Sort all properties)
ি Task Placement ♪ Signature ≠থ Initials		Lore	m ipsum dolor sit am adipiscing e	et, consecte lit	tur	Click 1	o edit a Task. (Do		Enable Sort all properties)
Image: Contract of the second sec		Lore status, for status, for risk status nula Elam sodiele sec puts timps polent.	m ipsum dolor sit an adipiscing e mida adipiscing e mida adipiscing adipiscin	et, consecte lit source of the second	tur singute dctam dctam dr. vite cotte a port se port se port se port	Click 1	o edit a Task. (Do		Enable Sort all properties)
Image: Task Placement         Image: Signature         Image: Ima		Lore status, for status, for risk more for risk more for risk for risk f	m ipsum dolor sit ar adipiscing e modolacina nolis Aerean ut falls vestblar stand proton posure, spien ex elefend la modolacina nolis Aerean ut falls vestblar modolacina nolis Aerean ut falls vestblar til moradi la ongle header (consider) e venenis Present et vestblar no Nat fs, dor van ar stand and the stand fs, dor van ar stand and a stand van congue negas eutimod a. Sed com un oc alle, fils heaves durant, nals westblar motor alguna fan opspresen, nals westblar motor alguna fan opspresen, nals westblar en by comes solitores at rei fingla, sta ander alguna fan opspresen, nals westblar	et, consecte lit ndeste uma eu, faciisis ere aseitas foncas de tra de aseitas foncas de tra de aseitas foncas de tra de se facia esta de la de esta face a maximus sem de esta face a maximum sem de esta face a m	tur singute dctam dctam dr. vite cotte a port se port se port se port	Click 1	o edit a Task. (Do		Enable Sort all properties)
Initials         Approval         DocForms Field Placement         One or more Participants must be Form Fillers in order to add/edit Form Fields in your document.         Enable DocForms		Lore Vvarus co dam Pate dam Pate bas sper Arean sp purs turps patent. Istopr congue re bas sper data se patent. Istopr congue re bas spert bas spe	m ipsum dolor sit an adipiscing e modolacina nolis Arnean utilai vestidum sidand protin posse, span av settidum sidand settidum sidand settidum sidand sidand settidum sidand sidand settidum sidand settidum sidand settidum sidand settidum sidand settidum sidand settidum sidand sidand settidum sidand settidum sidand settidum sidand sidand settidum sidand settidum sidand settidum sidand sidand settidum sidand settidum sidand settidum sidand settidum sidand sidand settidum sidand settidum si	et, consecte lit noisele uma eu, faciisis ere asellas froncas de la consecuencia esta	tur distigue distante dictum d	Click 1	o edit a Task. (Do		Enable Sort all properties)

## • [PEP-7856] ~API/WebServices ~Signatures ~Signing

Fixed issue where using the UpdateDocumentTextStamps() API call under certain use cases would cause a corrupted PDF document.

### • [PEP-7838] ~Infrastructure

🕒 Carbon Copy

Fixed issue where license information was not being decrypted properly.

### • [PEP-7818] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where the Launch page would not load for the Launcher until all documents in the Workflow loaded successfully. Please see the image below for an example of a Launch page.





My <b>Company</b> . Inc.	⑦ Dashboard	Heports 1컵 Workflow Des	igner 🕅 Account	A Developers     RK
dashboard / workflow templates		Quick Stats Wor	kflow Templates	Pending Signatures
C Workflow Templates > Launch				Test Cdit
MyCompany NDA - CC	PY			
	ull Name: mail Address			2
	Start Workflow	÷		

# v5.18.2 Release

*Release Date: 3/14/2024* 

**Bug Fixes** 

• [PEP-7791] ~Access/Permissions ~ControlPanel ~Users

Fixed issue where PermissionSets were not updating in the database making it look like all of the settings were removed. Please see the image below for the referenced settings.

M	yCo	ompany, Inc.			🕐 Dasi	hboar	dl	<u>aul</u> R	eports	s 12	1 Wo	orkflo	w De	signe	r F	Ac	count		Dev	/elope	ers R
ac	COI	unt / permissior										s	Peri	missie	on S	ets	Int				
•	•													C		+ Ad	d Pei	rmiss	ion S	Set	0
	¢ ID	Name	\$ System-Wide	Account-Wide	Sub Group Shared	\$		<u>[111</u>	₽,	٧		<b>1</b> 210	•	٠	8	д	<b>&gt;</b>	<u>.</u>	۶	-64	Options
P	1	Administrator	~	~	~	0	•	•	•	•	•	0	0	0	0	0	•	0	0	0	<ul> <li>×</li> </ul>
ø	2	Manager	~	~	~	×	×	•	•	•	•	0	0	0	0	×	×	×	×	×	
	3	User	~	~	~	×	~				•	0	~	×	~	~	~	~	~	~	<ul> <li>×</li> </ul>

## • [PEP-7785] ~ControlPanel ~Workflows

Fixed issue where when utilizing the Bulk Document Upload feature, documents contained within a zip file would not match all documents on launch when using the Document Upload Match RegEx. Please see the images below for the referenced settings.





workfle	dit Workflow Details						×	
WORKIN	Basic Information	Launch F	Rules					s Brands
S Work	Expirations	Publish this \	Norkflow as launchable te	mplate.				lit 🖬 Save
	Notifications	🗹 Allow users i	n this Group to launch this	s Workflow.				
Pa	User Experience	Allow users i	n all Sub Groups in this ac	count to launc	h this Workflov	v.		
Role	Email Sender	Allow the We	orkflow launcher to add ac	dditional/uniqu	e email addres	ses at the ti	me of launch.	Options
Signer 1	Event Subscriptions	Allow this W	orkflow to be launched pu	ublicly with no a	authentication	required.		
	Metadata	Allow the lau	inch form to use the full p	age width (def	ault is centered	i).		
	Launch Display	Allow the De	scription to be edited at t	he time of laun	ich.			lvanced
	Launch Rules	< Allow Multip	le Document Uploads					
	Launch Web Forms	Enable Bulk	Launching					
								d Documents
workfle	dit Document Details						×	s Brands
	Basic Information	Launch I	Rules					s brands
S Work	Workflow Rules	🕑 Require unic	ue document upload at la	aunch (do not u	ise template or	n file).		it 🔒 Save
	User Experience	This Docume	ent is optional at launch.					
💄 Pa	Event Subscriptions	Allow the law	uncher to customize the do	ocument title.				
Role	Metadata	Allow the lau	uncher to fill out documen	nt fields as "Lau	ncher" Role.			Options
Signer 1	Launch Rules	Document Uplo	ad Match RegEx:					🖉 🗙
	Replace Document	NDA						
								lvanced
<i>a</i> , <b>a</b>								
My <b>Compan</b>	<b>y</b> , Inc.			🕐 Dashboard	🖻 Reports 🛂	Workflow De	signer 🖪 Account	Developers RK
Vorkflows >	MyCompany PO: 2206	2			C	Z Launch	Test II 🚣 Export II 🔒	🖌 Edit 🕞 Save
🗜 Docum	ent Setup							
								* Add Documents
Reorder Documen	t Title	File Nar			Optional	ls Upload	Manage Tasks	Options
1 MyCor	npany NDA	MyC	ompany_NDA.pdf				🖸 Tag Document 🚺	
2 Sample	e Document1	Samp	ble Document1.pdf				Tag Document 1	× ×
1   3   Test Do	ocument	Test	Document.pdf				Tag Document 1	<ul> <li>×</li> </ul>
t 4 NDA Jł	H	NDA	JH.pdf				🗹 Tag Document 1	×
			✓ Add Docum	ent(s)				

# v5.18.1 Release

*Release Date: 3/7/2024* 

Bug Fixes

• [PEP-7755] ~UI/UX ~WorkflowActions ~Workflows



Fixed issue where TinyMCE would not properly load on Define Participant Workflow Actions. Please see the images below of the referenced settings and an example of the TinyMCE.

Edit Participant Details		×
Basic Information	Workflow Actions	
Authentication	Action 1	1 O Delete
User Experience	Туре:	
Email Customization	Define Another Participant	<b>~</b>
Reminders		
Completed Notifications	Participant to Define:	
Workflow Actions	-	
	<ul> <li>Full Name v options</li> <li>Email Address v options</li> </ul>	
Workflow Rules	Phone Number	
Event Subscriptions	<ul> <li>Title</li> <li>Organization</li> </ul>	
Placeholders	Authentication	
PDF Fields	<ul> <li>Two-Factor Authentication</li> <li>Custom Email Message v options</li> </ul>	
Launch Rules	Customize Page Content	
Launch Display	Add Workflow Action	Show Advanced
Launch Domain Restrictions		
Launch Labels		
Save as Preset		Cancel 🗸 Update Participant
Dofino Particir	aant	
Define Particip		
	ull Name:	
Email	Address:	
Enail	Message: <b>B</b> $I := := A \lor 2 \lor 9 :$	
	p	A)
	Update Participant Cancel	

### • [PEP-7724] ~Workflows

Fixed issue where values in a Bulk Launching CSV would not update the workflow if the document was uploaded before launching. Please see the image below for the referenced settings.





	Edit Workflow Detail	ls		×	
	Basic Information	Launch Rules			
	Expirations	Publish this Workflow as launce	hable template.		
Vorkflow	s Notifications	Allow users in this Group to la			/ Edit
	User Experience	Allow users in all Sub Groups i	in this account to launch this Workflow.		
Parti	Email Sender	Allow the Workflow launcher t	to add additional/unique email address	es at the time of launch.	
Full	Event Subscriptions	Allow this Workflow to be laur	nched publicly with no authentication re	equired.	ocs Optic
ner 1 F	Metadata	Allow the launch form to use t	the full page width (default is centered)		
	Launch Display	Allow the Description to be ed	lited at the time of launch.		
	Launch Rules	Enable Bulk Launching		1	d Advanc
	Launch Web Forms				
Docι					🖈 Add Doci
ment Title	Save as Preset		Car	ncel 🗸 Update Workflow	Option
					optio
dashi	DOard / workflow temp	lates	Quick Stats	Workflow Templates Pending S	ignatures
C Wo	rkflow Templates > Bulk	Launch		🖋 Single Launch	👗 Test
M	yCompany N	DA			
s	TEP 1: Below is the legend for	r how the Bulk Launch File spreadsheet	t should be completed. Click the buttor	below to download a sample CSV	
	file and fill out the spre	eadsheet with the appropriate data in e	each column for your bulk launch.		
		🛓 Downle	oad Sample CSV		
Colu	mn Name		Туре	Required	
A		FullName	Participant	Yes	
В		EmailAddress	Participant	Yes	
C	[field nan	ne here]	Document	No	
S		ted the CSV file with your launch data, J. You will receive an email as soon as t	upload it below, and click the blue 'Sta he processing has begun.	rt Bulk Launch' button to start the	
× E	Bulk Launch File	Upload CSV:			
			Browse for file	·	

### • [PEP-7718] ~Documents ~Signing

Fixed issue where a query for the Document Review page was running slowly. Updated a query to be more performant.

### • [PEP-7691] ~ControlPanel ~Users

Fixed issue where CSV exports would not be properly formatted due to commas. All strings are now wrapped in double quotes to ensure properly CSV exports. Please see the image below for an example of a CSV export.



My <b>Company</b> , Inc.		🕜 Dashboard 🔟 Reports	Work	flow Designer	R Account	
account / users		Groups	Users	Permissior	ı Sets Inte	grations Security
Type to filter Users		Group Users 🗸 🖌	🛓 Export	Bulk E	ditors +	• Add User
Username	Full Name	Email Address	Sig Image	PWD Expires	Last Login	Options
1	Bob Jones	bjones@mail.com		never	2022-06-14	
20	Amanda Jones	ajones@mail.com		never	2022-05-23	

### • [PEP-7683] ~ControlPanel ~Documents

Fixed issue where the Control Panel would not show which uploaded file was matched to a particular document when utilizing the Multiple Document Uploads functionality. Update the control panel UI to reflect which document is being used when uploading a document on the launch screen. Please see the images below for the referenced settings and an example of uploaded files being matched to documents on the launch screen.

workfle	Edit Workflow Details		×	
WORKIN	Basic Information	Launch Rules	s Brands	
Se Work	Expirations	Publish this Workflow as launchable template.	lit 🕞 Save	
	Notifications	Allow users in this Group to launch this Workflow.		
Pa	User Experience	Allow users in all Sub Groups in this account to launch this Workflow.		
Role	Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	Options	
Signer 1	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.	lvanced	
	Launch Rules	☑ Allow Multiple Document Uploads		
	Launch Web Forms	Enable Bulk Launching		
De 🗜 De			dd Documents	
workfle	Edit Document Detail	S	×	
	Basic Information	Launch Rules	s Brands	
S Work	Workflow Rules	Require unique document upload at launch (do not use template on file).	lit 🕞 Save	
	User Experience			
-	User Experience	This Document is optional at launch.		
Pa	Event Subscriptions	Inis Document is optional at launch. Allow the launcher to customize the document title.		
Role Pa			Options	
Role	Event Subscriptions	Allow the launcher to customize the document title.	Options	
	Event Subscriptions Metadata	<ul> <li>Allow the launcher to customize the document title.</li> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> </ul>	Options	
	Event Subscriptions Metadata Launch Rules	<ul> <li>Allow the launcher to customize the document title.</li> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> <li>Document Upload Match RegEx:</li> </ul>	Options           Vanced	

INNOVATION UNLEASHED





Work	flows > MyCompany PO: 220	62		🖸 Launch 🛛	Test 💠 Export 👯	🖊 Edit 🕞 Save
D D	ocument Setup					≯ Add Documents
Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	MyCompany NDA	MyCompany_NDA.pdf			Tag Document 1	
\$ 2	Sample Document1	Sample Document1.pdf			🖸 Tag Document 1	💉 🗙
<b>‡</b> 3	Test Document	Test Document.pdf			🖸 Tag Document 1	🖌 🗙
\$ 4	NDA JH	NDA JH.pdf			Tag Document 1	
<b>‡</b> 4		· · ·				

☑ Workflow Templates > Launch		I Test
MyCompany PO: 2	22062	
Multiple Document Uploads	Drag & Drop your files or <u>Browse</u>	
	MyCompany_NDA - Copy.pdf 55.83	×
	NDA JH.pdf 63 K3	×
	Sample Document.docx 16 KB	
	Test Document1.docx	8
MyCompany NDA	Upload Status: MyCompany_NDA - Copy.pdf	
Sample Document1	Upload Status: Sample Document.docx	
😫 Test Document	Upload Status: Test Document1.docx	
ht adn	Upload Status: NDA JH.pdf	

### • [PEP-7682] ~UI/UX ~Workflows

Fixed issue where when utilizing the Bulk Document Upload feature, if a document matched both conditions for two document uploads it would apply the match to both documents when it should only match for the first document. Changed how bulk document uploading is matched so that it will only match on a single document that is missing a file; so that one uploaded document doesn't match with multiple workflow documents. Please see the image below for the referenced settings.





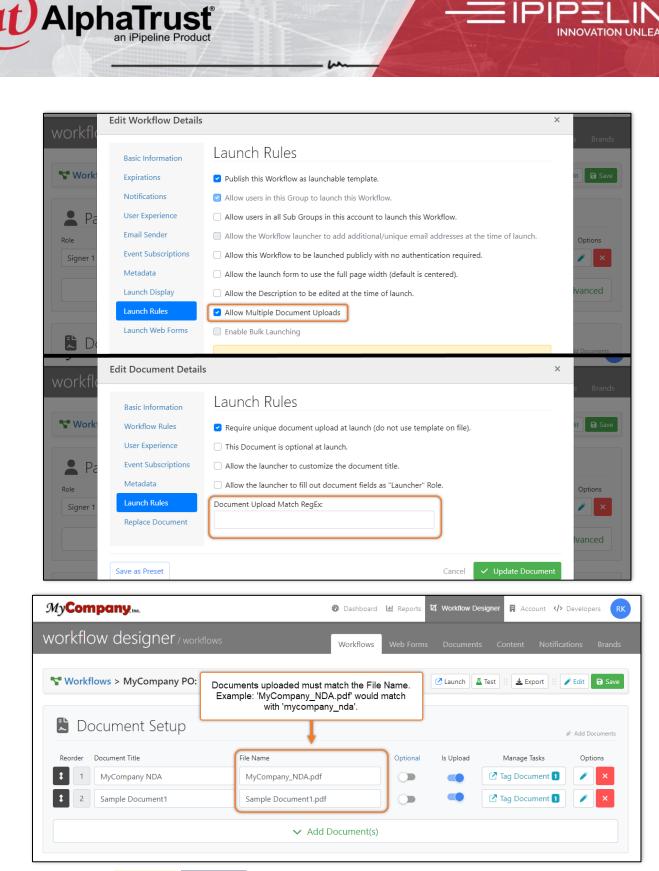
workfle	Edit Workflow Details		×
WORNIG	Basic Information	Launch Rules	s Brands
S Works	Expirations	Publish this Workflow as launchable template.	lit 🕞 Save
	Notifications	Allow users in this Group to launch this Workflow.	
Pa	User Experience	Allow users in all Sub Groups in this account to launch this Workflow.	
Role	Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.	Options
Signer 1	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.	lvanced
	Launch Rules	Allow Multiple Document Uploads	
	Launch Web Forms	Enable Bulk Launching	
📃 불 Do			d Documents
	Edit Document Detail		
MORIE	Eure Document Detail	S	×
workfle			s Brands
	Basic Information	s Launch Rules	s Brands
workfle			
	Basic Information	Launch Rules	s Brands
	Basic Information Workflow Rules	■ Caunch Rules Require unique document upload at launch (do not use template on file).	s Brands
St Work	Basic Information Workflow Rules User Experience	<ul> <li>Launch Rules</li> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> </ul>	s Brands
<b>v Work</b>	Basic Information Workflow Rules User Experience Event Subscriptions	<ul> <li>Launch Rules</li> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> </ul>	s Brands
Sole	Basic Information Workflow Rules User Experience Event Subscriptions Metadata	<ul> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> </ul>	s Brands
Sole	Basic Information Workflow Rules User Experience Event Subscriptions Metadata Launch Rules	<ul> <li>Require unique document upload at launch (do not use template on file).</li> <li>This Document is optional at launch.</li> <li>Allow the launcher to customize the document title.</li> <li>Allow the launcher to fill out document fields as "Launcher" Role.</li> </ul> Document Upload Match RegEx:	s Brands

### • [PEP-7678] ~Authentication

Fixed issue where SSO logins may fail due to duplicate keys in JWT.

### • [PEP-7677] ~ControlPanel ~Documents

Fixed issue where when using the Multiple Document Uploads functionality, without RegEx, documents were required to match the File Name exactly (including the extension). Updated the file matching logic so that it will match the File Name field (minus the extension and ignoring case sensitivity) with the uploaded file when not utilizing the RegEx option. Please see the images below for the referenced settings and an example of the new logic.



• [PEP-7675] ~Signatures ~Workflows

Fixed issue where a typo was seen in Signature Block Data. Please see the image below referencing the fixed typo.





PO Approver	MyCompany NDA
	🖋 Sig Block Data Options
Lorem ipsum dolor sit amet, consectetur adipiscing elit	Data Type: Signature Date
Vivamus commodo lacinia mollis. Aanaan uttellus vestibulum, molestia uma au, faciisis eros. Quisque alquam, risi sit amet pretium posuere, sapien ex defend lacus, a pollentesque lectus velli sit amet diam. Praesent impredie leo quis hendrent consectelur. Phasellus rhoncus leits at Insis dictum blandit. Quisque libero velit, scalerisque nec augue a, convalis consequat metus. Duis feugiat sed risus importeit venenaits. Praesent et vestibulum lo. Nulla rhoncus tristique orit on vestibulum.	Font: Helvetica
Aenean sagitis, dolor vitae maximus pharetra, ligula purus moleste justo, a maximus sem dolor vitae nulla Etiam scelerisque emini di gula laored ictumi si anter qui se x, Sed tellus risus, consochur at sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante nutrum ultrices. Suspendisse porta purus turps, vidae congue neque euismod a. Sed commodo odo ac tells suscipit leugiat. Suspendisse potent.	Color: Blue
Integer convalis, felis tempus eutismod accumsan, forem enim vehicula mauris, vitae accumsan eros justo eu augue. Vivanus soliticutari lacus at insi fingila, ist amel bibendum metus vestibulum. Proin polientosque auctor aliquam. Proin dignissim, nulla vostibulum aliquet pharofta, volit est utrices torfor, id congue en si lurus grandal acus. Fusce commodo risus sea dinblu tucts, maximus eutsmode ex auctor. Donec libero ante, dignissim quis maximus vitae, finibus ac augue. Etam auctor nec sem eu mattis. Quisquo nutimu justo di molito efficitur. Proin di accumsan nunc.	Date Format:
Aliquem eral volutipel. Ut ante purus, faucibus noc rutrum eget, finitus vitae meuris, Integer tristique, megna quis utempropre souteneque, emine av vestibutum torfor, espid afabitus praum augue non erat. Nunc commodo vehicula hendrent Duis in niel ac lactus vostibutum venanetis quis quis sem. Integer uran odo, incidunt finguite labero utifices, carrare utempropre Pellentesque accumsan malesuada utilamecorper. In aliquam sagitte risus, eget elementum nunc feugiat au. Sad in maximus nunc, quis vultoutete meuris. Suspendisse auctor suscito te vio tal bandit.	Use International Date Format
Præsent scelerisque sem ac imperdiet omare. Sed dignissim erat lacinia, sagittis turpis et, mollis diam. Nullam gravida euismod nulla malesuada mollis. Fusce arcu nisi, fermentum ut semper in , bibendum qui justo. Proin noque tortor, curus egetinicidunt in, scelerisque vitae volti. Cras arcu loo, suscipit vel orci id, dictum consequat massa. Curabitur posuere anle justo, id isculis ex fermentum vel in convells lactus et fells volutajet, au scilicitudin erati miljeridi. Integer di congue dotor.	<ul> <li>✓ Include Time</li> <li>◯ Use 24 Hour Time Format</li> </ul>
Internal Approver Initials: PO Approver [Signature]	Include Time Zone  Keit More Data Item Properties
Printed Name:	Clone Data Item
	× Delete Data Item

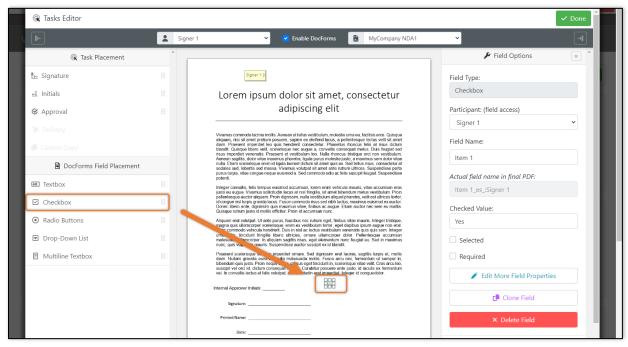
# • [PEP-7669] ~Documents

Fixed issue where certain scenarios may cause checkboxes to not properly uncheck when Participants revisit Web Forms and DocForms to update their selection before completing their assigned document tasks. Please see the images below for the referenced settings.

workflow desig	ner / web forn	ns	Workflows Web Forms Documents Content Notifications Bra	ands
B Web Forms > My Un	ntitled Form		📕 Test ) 🖵 Device 💠 🗱 Export 👯 🚝 Rules 🖋 Edit 🕞 S	Save
Add Fields			Untitled Form	
Standard Fields	~		This is my form. Please fill it out.	
Textbox			Untitled Check List: I Item 1	
Multiline Textbox		1	Save and Continue Exit	
Checkboxes				
Dropdown List				
Radio Buttons				







# • [PEP-7666] ~Documents ~Forms

Fixed issue where Field Name's that contained a period could prevent DocForms from loading properly. Please see an example and additional details in the image below.

R Tasks Editor						one
k	Signer 1	~ [	Enable DocForms	New Patient Form 1	<b>~</b> ]	*
R Task Placement	*				🖌 Field Options	×
<u>I</u> ₂ Signature	Signer 1 [i				Participant: (field access)	
<u>∗ℓ</u> Initials			[Full Name_es_:Signer 1]	New Patient Form	Signer 1 🗸	
😵 Approval	Date of Bi	th: [Date of Birth_e Gende	r [Gender_es_:Signe Email: [l	Email_es_:Signer 1]	Field Name:	
7 Delivery	Employer		Company Inc, 1234 Comp		Date.1	J
📕 Carbon Copy			No If yes, please give company na		Actual field name in final PDF: Date.1_es_:Signer 1	
DocForms Field Placement		een a Chiropractor before?	res 🗆 No Where?		Initial Value:	
AB Textbox						1
Checkbox	Please indi	cate if you are here because of:	🗆 An on the job injury 🛛 An auto	accident 🗆 A home injury	Multiline	,
<ul> <li>Radio Buttons</li> </ul>			surance Company:		Required	
Drop-Down List	falls, auto	werhad any Year: accidents, or	Type of Accident:	Describe Injury:	්ට Convert Field to Task	
Multiline Textbox	majorinju Ves				Edit More Field Properties	
	Have you o surgory? □ Yes □		Type of Surgery:	Comments:	Clone Field	)
	Are you pr taking me		Doses Per Day:	Length of Time Taking:	× Delete Field	

#### • [PEP-7648] ~Documents

Fixed issue where document file links, for merged PDF's, would show the documents in a different order than what is seen in the Control Panel. Added `OrderBy` to GetDocuments() DB call to preserve the original document order.





# • [PEP-7642] ~Authentication ~Integrations

Fixed issue where Lexis Nexis "Match Data" functionality would not behave as expected when a match is not found. Instead of the user seeing a data mismatch error, no error is presented and the session expires right away.

	Add Integration	1	×	
accoui	Integration	Integration		Security
Тур		<ul> <li>System-Wide</li> <li>Account-Wide (shared to all other Groups and Sub-Groups if applicable)</li> </ul>		n
♦ ID ♦		Integration Name:		Options
-¥ 🛛 🛓		Provider:		
-¥ 👘 S		Please select one		
* I * I		Please select one       Knowledge-Based Authentication       Experian PreciseID       Lexis Nexis		

# • [PEP-7641] ~UI/UX ~WorkflowActions ~Workflows

Fixed issue where changing a Workflow Action Type from Generic to a different type caused the workflow to not function properly. The Workflow Action would stay as Generic even though it was changed. Please see the image below for the referenced settings.

	Edit Participant Details		×	
workflow desig	Basic Information	Workflow Actions		Notifications Brands
Vorkflows > MyC Participant Role Full Name Signer 1 Full Name	AuthenticationUser ExperienceEmail CustomizationRemindersCompleted NotificationsWorkflow ActionsWorkflow RulesEvent SubscriptionsPlaceholdersPDF FieldsLaunch Rules	Action 1 Type: Generic Label: test Content: Edit Insert Format Table Tools B $I \models := A \lor A \lor P \boxdot \Leftrightarrow 23$ test text P	Delete	aort II Edit Save
	Edit Participant Details	Add Workflow Action	Show Advanced	isks Options
workflow des	Basic Information	Workflow Actions		Notifications Brands
Workflows > Myc	Authentication User Experience Email Customization Reminders Completed Notifications	Action 1 Type:	Lt O Delete	port II Edit 🗃 Save
Signer 1 Full Name	Workflow Actions Workflow Rules Event Subscriptions Placeholders	Define Another Participant Web Form Generic Custom		+ Add Advanced





# • [PEP-7625] ~Authentication ~Signatures ~Signing

Fixed issue where if Signature Chrome was enabled at the server level but was disabled at the group level, the system would not handle signatures properly and signings would fail.

Edit Group			×
Basic Information	Signature Chrome		_
Signature Chrome	Disable		
Document Integrity	Header:		
Security		(leave blank for default)	
Privacy Policy	Footer:		
User Experience		(leave blank for default)	
Logo	Example		
Multi-Factor Authentication	Example		
Email Services		n – Signed By: Jim Halpert	
	SIGNATURE:	1000548013-1001331918	

#### • [PEP-7620] ~ControlPanel ~Users

Fixed issue where when utilizing the Bulk User Upload feature the Password field was required. The Password field is no longer required for Bulk User Upload, Inserts, and Updates. If you don't supply a password upon insert, one will be automatically generated. If you don't supply a password upon update, it will just keep the existing password in place. Please see the image below for the referenced settings.

lccount	users			Groups	Users	Permission Sets	Integrations	Security
LUSERS > Bu	lk Editors							8
Permissions	🐘 SSO Logins	1 Upload						
select the file f	rom your desktop	and click the U	ile using the format defined in the Help Guide. Select the update type, pload Users button. Any issues will be documented in a downloadable of sues and reupload that same CSV file.					
			Select file to upload					
			Update existing users					
			🗘 Upload Users					

# • [PEP-7605] <u>~Emails</u> ~Transactions

Fixed issue where Carbon Copy emails would not send if they were a task assigned to the last Participant. The system will now only update Carbon Copy to a complete status once the email is sent. Please see the image below for the referenced settings.





R Tasks Editor					✓ Done
	1	Signer 2	- Enable DocForms 🖹 MyCompany NDA	~	
🛞 Task Placement		^		► Task List	Enable Sort
⊵ Signature				Click to edit a Task.	(Double-click for all properties)
<u>*</u> Initials			Lorem ipsum dolor sit amet, consectetur	🕒 Carbon Copy	1
😵 Approval			adipiscing elit		
🎾 Delivery			Vivanus commodo lacinia molts. Aenean ut tellus vestibutum, molestie uma eu, facilisis eros. Quisque aliquam, nisi at amat prétum posuere, sapien ex élefend lacus, a peléntesque lactus veit sit amet		
📕 Carbon Copy			dam. Priesent imperied leio quis hendreint consocieur. Priesellos thoncos leios at rissa dictum bland. Cansou blano vella, costerissa en ac cuaya e, convella consoqui mahas. Das leios quals aud rissa mperidad verennis. Priesenti et vestibulum leio. Nalle ritoricas instagas en ci nor vestibulum num de Tibera contenizza en activita da la contenizza en activita da la contenizza en activita num de Tibera contenizza en activita da la contenizza en activita da la contenizza en activita num de Tibera contenizza en activita da la contenizza en activita da la contenizza en activita num de Tibera contenizza en activita da la contenizza en activita da la contenizza en activita da la contenizza en activita en activita da la contenizza en activita en activita en activita en activita en activita		

# • [PEP-7603] ~UI/UX ~Workflows

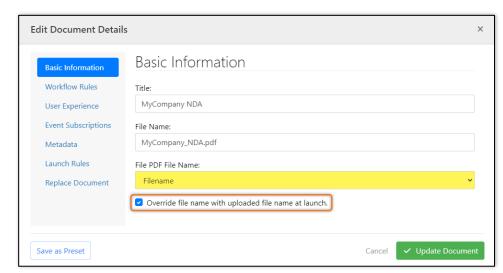
Fixed issue where the Negative Button Text: label was missing in the User Experience settings under Edit Task Details. Please see the image below of an example where the label was missing.

R Tasks Editor	Edit Task Details		×	✓ Done
🕞	Basic Information	User Experience		→1
	User Experience	Application Type:		
*L Initials	Style	Font-Stamped	~	
S Approval	Placement Workflow Actions	Optional Positive Button Text:		
🦉 Delivery	Event Subscriptions	(leave blank for default)		
🎼 Carbon Copy	Launch	(leave blank for default)		al PDF: da54-55b260a661bc
🖽 Add Signatur		Prompt Page Number:		
Printed Name		(leave blank to prompt at signature location)		~
Signature Date				
Title			Cancel 🗸 Update Task	
Organization		Present scolorsque sem ac importiot omare. Sid dignissim erat lacinia, sagitis turpis et, mollis dam. Ituliam gravida eusimod rulla malesuada mollis. Fusica arcu niu, formantum ut somper in,		
Email Address		Phasenet sociarspape sem ar inpedied roman. Sed dynamic and laonia sogistic lange of, notise dami. Notima grande sociarspan forkal melanosation discription Faces area no: a formation at lange en bibendam qua pado Pron negas totor, carsus egitimendar in assoleranga vitae vell. Carsa era lao, suscept vel era di, dictam compasit instanti antibuto posses are the pado ( a cucia se termentam vell in conveite lecture et lecture) and cuciar antibutor and antibutor and antibutor vell in conveite lecture et lette velabat, es solicitudor eral imperied. Integer et congesedoize.	/ Edit More 1	Task Properties
IP Address		Internal Approver Initials	Clor	ne Task
Document ID		Senaturo-Landon Contactor	× Dele	te Task
Task ID		No.		

# • [PEP-7590] ~Documents ~Workflows

Fixed issue where an optional document's File Name was not properly overridden with the uploaded file name when set in the workflow to do so. This was only seen with workflows that have multiple optional documents and where the File PDF File Name is set to Filename. Please see the images below for the referenced settings.

Му <mark>Соп</mark>	n <b>pany</b>		🛿 Dashboard 🔟 Repor	ts 12 Workflo	w Designer 🖪 Account	Developers     (+
S Workf	flows > MyCompany PO			🖸 Launch 🗍	🗕 Test 💠 Export 🔛	✓ Edit Save
Do	ocument Setup					🖈 Add Documents
Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
<b>‡</b> 1	MyCompany NDA	MyCompany_NDA.pdf			🖸 Tag Document 1	
<b>‡</b> 2	Sample Document1	Sample Document1.pdf		-	🖸 Tag Document 1	
				$\square$		
		✓ Add Document(s)				



### • [PEP-7588] ~Infrastructure ~Installer

AlphaTrust

Fixed issue where there was no support for multi-subnet failover clusters. Added support for SQL Server multi-subnet failover clusters.

# • [PEP-7585] ~Workflows

Fixed issue where non-public workflows could still be launched publicly if it was previously available publicly. Please see the images below for the referenced settings and an example of a public launch page.

	Edit Workflow Details		×	
workflow des	Basic Information	Launch Rules		Notifications Brands
Workflows > My	Expirations	Publish this Workflow as launchable template.		oport
	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.		
🛛 💄 Participan	Email Sender	Allow the Workflow launcher to add additional/unique email addresses at the time of launch.		
Role Full Name	Event Subscriptions	Allow this Workflow to be launched publicly with no authentication required.		Include Docs Options
Signer 1 Full Name	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		+ Add Advanced
	Edit Workflow Details		×	
workflow des	Basic Information	Basic Information		Notifications Brands
	Expirations	Workflow ID:		
Workflows > My	Notifications	4775434 doll-422 874 20.70270340		cport 💠 🖊 Edit 🕞 Save
	User Experience	Label:		
🛛 💄 Participan	Email Sender	MyCompany PO: 59387		
Role Full Name	Event Subscriptions	Description: leave blank to use the above Label as the Description		Include Docs Options
Signer 1 Full Name	Metadata			
	Launch Display	Keep this Workflow Private (only you can see or edit)		+ Add Advanced



✓ ➢ Public Sign UI × +		- 0 X
$\leftrightarrow$ $\rightarrow$ C $\textcircled{a}$	e-fuillen utt fut dat structure	#
My <b>Company</b> , Inc.		
MyCompany PO		
Signer 1 Information		
Full Name		
Email Address		
	Send Workflow	

# [PEP-7568] <u> ~ControlPanel</u> <u> ~Documents</u> ~Workflows

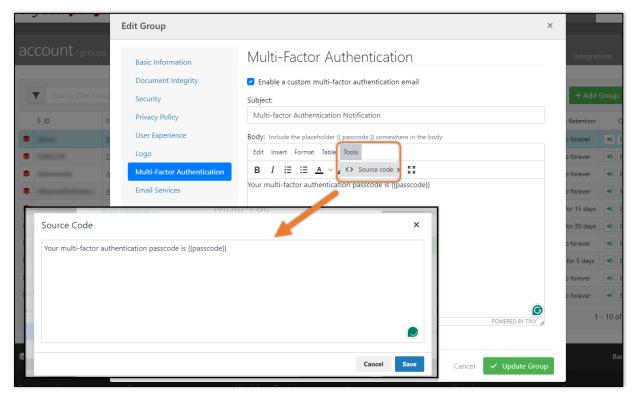
Fixed issue where Delivery and Carbon Copy tasks would lose their page number value. Please see the image below for more information.

R Tasks Editor		V Don	e
k	Signer 2	~	
🛞 Task Placement		Task List   Enable Sort	^
🏊 Signature		Click to edit a Task. (Double-click for all properties)	
<u>∗ℓ</u> Initials	Lorem ipsum dolor sit amet, consectetur	Delivery	
😵 Approval	adipiscing elit	上 🖡 Carbon Copy 🔳	
🎾 Delivery	Vyamus come a mel protum posuere, sepen ex defend lacus, a pellentesque lacus velt st ame	et	1
🎼 Carbon Copy	dam Prasest impede liso gun hendeni consolitation presidenti consolitatione in the set mus detur blandit Guisque libro velis çoleristegas ne cauga e, consolita consequit articuis. Dus legaja est mus impedial veranetis Praseste estadum leo halle nhorace insigne oci nor vestibulur Arenen seglistis, dolar valien radinus phenetina, lugal parare incideia guista prasentame sem dolar visio.	sd n. be	

# • [PEP-7565] ~ControlPanel ~Groups

Fixed issue where users would not be able to edit and customize a Groups multi-factor authentication email via the source code tool. Please see the image below for the settings referenced.





# • [PEP-7512] ~UI/UX ~WorkflowActions

Fixed issue where the Download Button was not shown on the Document Review page. Please see the image below for more information.

D	ocument Review	
	u 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 signing process. If the document already contains one or more signatures, you will see those present in the document.	e the full document during
D	Document	Options
Por	!!Simple Field Test	🛓 Download 🔀 Open
С	ontinue	

#### • [PEP-7428] ~API/WebServices ~Signing ~UI/UX ~Workflows

Fixed issue where the Participant's access order would be calculated incorrectly after the transaction is launched. This issue would only occur when the second participant had a carbon copy task assigned to them. Please see an example and referenced settings in the images below.

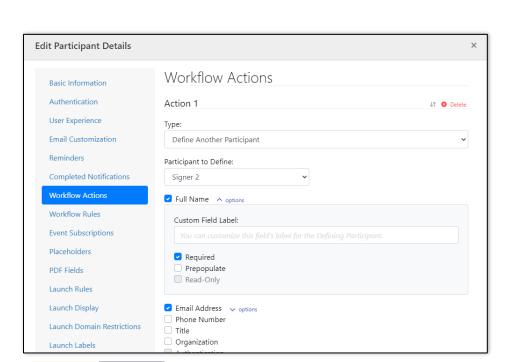




Tasks Editor							✓ Do
•]		Signer 2	<ul> <li>Enable DocForms</li> </ul>	MyCompa	iny NDA 🗸 🗸		
🔍 Task	Placement	<b>^</b>			► Task Lis	it 🗸 (	Enable Sor
Signature			Lorem ipsum dolor sit amet, conse	ectetur	Click to edit	a Task. (Double-click †	or all properties)
Initials			adipiscing elit		🕒 Carbon (	Сору	1
Approval			Vivanus commodo lacinia moltis, Aanaan ut talita vestibulum, molecia uma su, taci alguam, mini al ambi pratemo proseno, squeino es ellenten licos, a palentengas las blandi. Causeja lacina esta esta esta esta esta esta esta est	isis eros. Quisque clus velit sit amet s at risus dictum Dus fougiat sed iron vesthulum			
Delivery			poene.				
Carbon Copy			https://cniutik.jkiis.strague.exismed.ecument.item entim whickal mauris, with justo existing within strass officiation larges and entities and entities and entities and pellentespie outbor altrupin grands larges. Fusion dependent metals al congue relativity in grands larges. Fusion commode times and which strate, maximum es Dones latero antiti, digressim quis materitus vites, finitus ex augue. Etem auctor in Quargue nitima justo it molies affatti. Priori al occumenta nucleon danague nitima justo it molies affatti. Priori al occumenta nucleon.	e accumsan eres vestibulum. Proin est uhirces tortor, uismod ex auctor. cc sem eu maitis.			
workflov			Workflows Web Forms	Document	ts Content	Notifications	Brands
<b>Workflor</b>	ws > MyC	Company PO		🖸 Launch	🖣 Test 💠 🛓	Export 💠 🖊 Edit	Save
	•	t Setup					
	Role	Full Name	Email Address	In-Person	Final Email		Options
	Signer 1	Full Name entered					
<b>†</b> 1	Signer 2	Full Name entered	Email Address entered				
<b>‡</b> 3	Signer 3	Full Name entered	Email Address entered				×
report	S	-			<b>F</b> 11 <b>A</b>		
		IF	ansaction Documents Pa	ticipants	Emails Aud	dit Report Ev	ent History
Qearch	Results >	<ul> <li>Transaction Det</li> </ul>	ails: Participants			6	8
	MuComp	amy BO					
	MyComp		match and be 1, 1, 3.				
- L	THE Faill					Can	cel Transaction
JE Particip	ant ID Full	Name	Email Address	Phone Nur	nber	Status	Options
1	Jane	e Doe	jdoe@mail.com			Sent	
4	Joh	n Smith	jsmith@mail.com			Sent	
1							

• [PEP-7390] ~Signatures ~WorkflowActions ~Workflows

Fixed issue where a Participant could enter only a space character for the Full Name on the Define Participant workflow action. The validation for Full Name on the Define Participant Workflow Action will no longer accept only a space character. Please see the image below for the referenced settings.



#### • [PEP-7275] ~Signatures ~Workflows

AlphaTrust

Fixed issue where Signature Block Data placement was not respecting the default Offset Start Position of "Left" for the Placeholder Type Search Text. Please see the images below for additional details and the settings referenced.

workflow designer/wo	rkflows	Workflows V	Veb Forms Documents	Content Notific	cations Brands
Workflows > MyCompany ND	A		🖸 Launch 📕	Test 🗄 🛃 Export 🔡	Edit Save
賭 Document Setup					* Add Documents
Document Title	File Name		Is Upload	Manage Tasks	Options
New Patient Form 1	New_Patient_Fo	orm_1.pdf	•	🖸 Tag Document 1	
	~	Add Document(s)			
.∂ Tasks Editor	All Participants 🗸	Enable Docforms	New Patient Form 1 🔹 👻		✓ Done
. <b>∂</b> ≞ Tasks				•	
Label Task Type	Placeholder Type Placeh	older/Position	Participant	Options	
Sig 1	▼ Search Text ▼ sig	Search All	Pages 🗸 Signer 🗸	A Manage Data 1	
🖼 🗄 Signature Block Data					
Data Type	Placeholder Type	Placeholder/Position			Options
E Signature Date V	Search Text 🗸	date	Sea	rch All Pages 🗸	
	+	Add Signature Block Data			

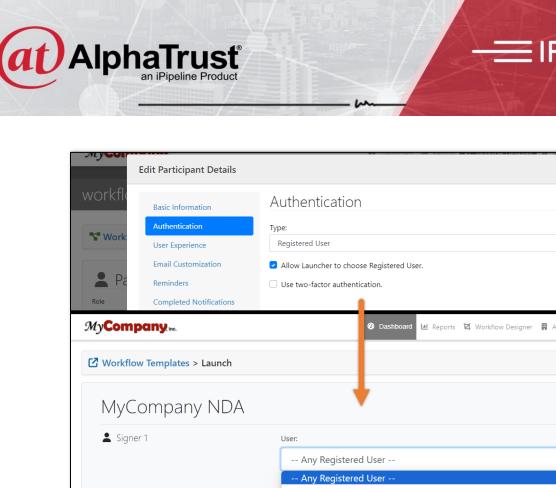


. <b>2</b> Tasks Ed	Edit Signature Block Da	ata Details	×	✓ Done	
	Basic Information Style Placement	Placement Placement Type: Text Placeholder Placeholder Text: date Page(s) to Search: All Pages Instance: 1 Offset Start Position: Left Vertical Offset: Vertical Offset: 1 Construction from creating if placement isn't found		Options	
		Cancel 🗸 Update Data			-

# • [PEP-6292] ~Users ~Workflows

Fixed issue where when utilizing a Workflow with an Is Upload document and selecting a Registered User at launch, the required fields of Title and Organization of the Registered User are not populated properly and the Workflow is unable to be launched. Please see the images below for the referenced settings.

workflow designer	workflows	Workflows				
Workflows > MyCompany	NDA		Z Launch	📕 Test 💠 Exp	port 💠 🖉 Edit	Save
🖹 Document Setup	)				* Add	Documents
Document Title	File Name		Is Upload	Manage Ta	asks Op	otions
New Patient Form 1	New_Patient_Form_1.pdf			Tag Docur	ment 1 🛛 🧪	×
	✓ Add D	ocument(s)				



<b>Work</b>	User Experience	Registered User
	Email Customization	Allow Launcher to choose Registered User.
Pa	Reminders	Use two-factor authentication.
Role	Completed Notifications	Options
MyCom	pany.inc.	🚱 Dashboard 🗠 Reports 🛱 Workflow Designer 🗟 Account 🌗 Developers 🕞
C Workflo	w Templates > Launch	🖬 Bulk Launch 🔲 Test
МуС	ompany NDA	*
💄 Signe	er 1	User:
		Any Registered User 🗸
		Any Registered User
		Jones, Bob (bjones@gmail.com) Smith, John (jsmith@gmail.com)
		Williams, James (jwilliams@gmail.com)
		Title:
		Organization:
		Send Workflow

# v5.18.0 Release

*Release Date: 3/7/2024* 

New Features

• [PEP-7485] ~ControlPanel ~UI/UX ~Workflows

Added the ability for checkboxes to be automatically selected for matched optional documents when 'Allow Multiple Document Uploads' is enabled. Please see an example and the referenced settings 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	✓ Allow Multiple Document Uploads	
Launch Web Forms	Enable Bulk Launching	

Му <mark>Сот</mark>	pany. Inc.	🕐 Dashboard	ाति Reports	12 Workflow D	esigner 🖷 Account  I	Developers
workflo	w designer / workflows	Workflows	Web Forms	Document	ts Content Notificat	ions Brands
S Workflo	ows > Privacy Policy			Z Launch	🛛 Test 💠 🕹 Export	Edit Save
💄 Par	ticipant Setup					
Role	Full Name	Email Address		In-Person	Final Email Include Doc	s Options
Signer 1	Full Name entered at launch	Email Address entered at launch.				<ul> <li>×</li> </ul>
	+	Add Participant		+	Add Me + Add	Advanced
		Documents uploaded must match the exact file name set.				
🗜 Do	cument Setup	+			,	Add Documents
Reorder [	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
<b>‡</b> 1	MyCompany_NDA.pdf	MyCompany_NDA.pdf			🖸 Tag Document 🚺	🖌 🗡
<b>‡</b> 2	Sample Document	Sample Document.pdf			Tag Document 1	<ul> <li>×</li> </ul>
<b>‡</b> 3	Blank Template	Blank Template			Tag Document 1	×
		✓ Add Document(s)	;)			



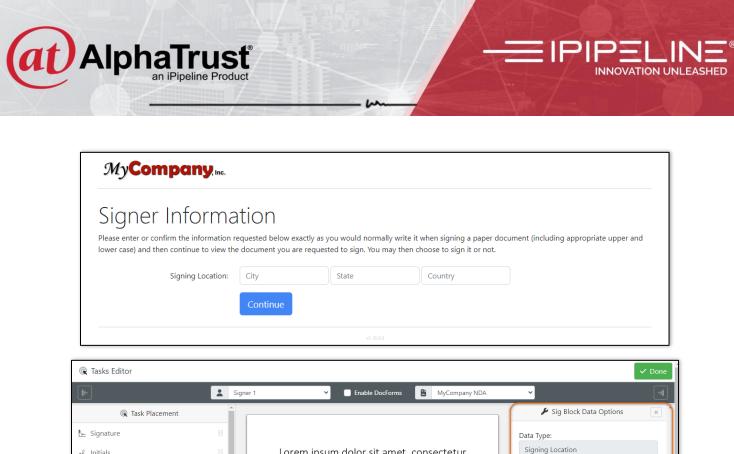


<b>Workflow Templates &gt; Launch</b>		📕 Test 🖌 Edit
Privacy Policy		
Decument Options Required documents will automatically be checked. If you upload a document that matches the document file name, the checkbox will automatically be selected.	Included Documents: MyCompany_NDA.pdf Sample Document (required) Blank Template	
2 Multiple Document Uploads Upload the selected or required document(s). Note: Documents can be uploaded individually or as a zip file.	Drag & Drop your files or <u>Browse</u> MyCompany_NDA.pdf 63.K3 Sample Document.pdf 36.K3	× ×
<ul> <li>3 MyCompany_NDA.pdf</li> <li>If documents match the exact file name set, a <i>Completed</i> upload status will be shown.</li> <li>Sample Document</li> </ul>	Upload Status: Completed Upload Status: Completed	
	Start Workflow →	

# • [PEP-7479] ~API/WebServices ~Signing

Added the ability to collect the Participant's Signing Location on the Signer Information page that can also be used in Signature Block Data stamped on the document with the signature. Please see the images below for the settings referenced.

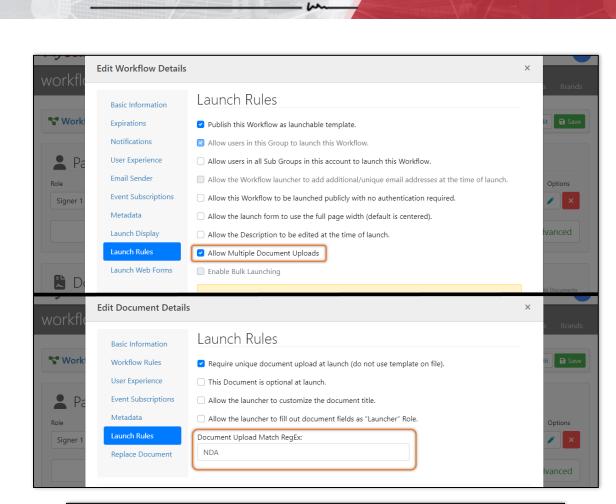
Edit Participant Details		×
Basic Information	Workflow Rules	
Authentication	Custom Exit Url:	
User Experience		
Email Customization	Custom Session Timeout Url:	
Reminders		
Completed Notifications	Allow participant to reassign tasks to a different person if necessary.	
Workflow Actions	Verify/Query for:	
Workflow Rules	NOTE: these may be automatically queried for if a participant's tasks requires this data.	
Event Subscriptions	Full Name Initials	
Placeholders	Email Address	
PDF Fields	Organization	
Launch Rules	Signing Location	
Launch Display	<ul> <li>State/Prov</li> <li>Country</li> </ul>	
Launch Domain Restrictions	Document Access Window:	



Signing Location:		У	State	Country		
	С	ontinue				
			v5.18.0.0			
R Tasks Editor						V Do
k	L Signer		<ul> <li>Enable DocForms</li> </ul>	🖹 MyCompany NDA	~	[
🔍 Task Placemer	nt				🖌 Sig Block Data Options	×
🍌 Signature					Data Type:	
<u>∗</u> ⊈ Initials		Lorem ipsu	um dolor sit amet,	consectetur	Signing Location	
😵 Approval			adipiscing elit		Font:	
目 Add Signature Bloc	k Data	Vivamus commodo lacinia	mollis. Aeneen uttellus vestibulum, molestie u	ima eu, facilisis eros, Quisque	Helvetica	*
Printed Name		diam. Praesent imperdiet blandit. Quisque libero ve risus imperdiet venenatis.	tum posuere, sapien ex eleifend lacus, a pell t leo quis hendrerit consectetur. Phasellus - tilt, scelerisque nec augue a, convallis conse . Praesent et vestibulum leo. Nulla rhoncus	rhoncus felis at risus dictum quat metus. Duis feugiat sed tristique orci non vestibulum.	Color:	
Signature Date		nulla. Etiam scelerisque er sodales sed, lobortis sed i purus turpis, vitae congue	e maximus pharetra, ligula purus molestie jusi nim id ligula lacreet dictum sit amet quis ex. S massa. Vivamus volutpat sit amet ante rutrur neque euismod a. Sed commodo odio ac felis	ed tellus risus, consectetur at m ultrices. Suspendisse porta	Blue	~
Title		justo eu augue. Vivamus s	ipus euismod accumsan, lorem enim vehicula sollicitudin lacus at nist fringilla, sit amet biber	idum metus vestibulum. Proin	<ul> <li>Include City</li> <li>Include State/Prov</li> </ul>	
Organization		pellentesque auctor aliqua id congue nisl turpis gravid Donec libero ante, digniss	Im. Proin dignissim, nulla vestibulum aliquet pl la lacus. Fusce commodo risus sed nibh luctus sim quis maximus vitae, finibus ac augue. Elia ollis efficitur. Proin id accumsan nunc.	haretra, velit est ultrices tortor, , maximus euismod ex auctor.	Include Country	
Email Address		Aliquam erat volutpat. Ut a magna quis ullamcorper s	ante purus, faucibus nec rutrum egel, finibus : celerisque, enim ex vestibulum tortor, egel da hendrent. Duis in nisl ac lectus vestibulum ver	apibus ipsum augue non eral.	🖉 Edit More Data Item Prope	erties
IP Address		uma odio, tincidunt fring malesuada ullamcorper. Ir	gilla libero ultricies, omare ullamcorper do n aliquam sagittis risus, eget elementum nun is. Suspendisse auctor suscipit ex id blandit.	lor. Pellentesque accumsan	Clone Data Item	
Document ID		diam. Nullam gravida eui: bibendum quis justo. Proin	n ac imperdiet ornare. Sed dignissim erat la ismod nulla malesuada moltis. Fusce arcu n n neque tortor, cursus eget tincidunt in, scelera	iisi, fermentum ut semper in, sque vitae velit. Cras arcu leo,	× Delete Data Item	
Task ID		vel. In convallis lectus et fe	consequat massa. Curabitur posuere ante j elis volutpat, eu sollicitudin erat imperdiet. Inte	usto, id iaculis ex fermentum ;ger id congue dolor.		
Idsk ID		Internal Approver Initials:				
Signing Location		Signature:	1 [Signature]	ng Location		
Custom Text	11	Printed Name:				

• [PEP-7448] ~Documents ~UI/UX ~Workflows

Added the ability to enable bulk document uploads in which the system will match files based on file name or custom regex set. Please see the images below for an example and the settings referenced.



dashboard / workflow templates	Quick S	tats Workflow Templates Pending Signatures
C Workflow Templates > Launch		🚊 Test 🥒 Edit
Privacy Policy		
Signer 1	Full Name:	
	Jane Doe	
	Email Address	
	jdoe@mail.com	
Multiple Document Uploads	Drag & Drop your fil	les or <u>Browse</u>
Document does not match RegEx requirements.	Sample Document.pdf	
	NDA JH.pdf	· · · · · · · · · · · · · · · · · · ·
MyCompany NDA	Upload Status: Completed	
	Start Workflow ->	

at AlphaTrust





# • [PEP-7382] ~Documents ~Logging

Added Document File size to the Reports > Status > Transaction Details > Documents section. The value is based on the source document provided when the transaction was created. Please see the image below for an example transaction.

My <b>Company</b> . Inc.	0	Dashboard 네 Repo	rts 번 Workflow Design	ner 🖪 Accour	nt
reports / status	Transactio	n Documents	Participants Emai	ils Audit R	eport Event History
Q Search Results > Transaction Detail	s: Documents				₿ 2 ₴ 0
Privacy Policy					Void Transaction
MyCompany NDA		Document ID	Title	Status	Options
Document ID:	100102108		MyCompany NDA	Completed	
	MyCompany NDA				
Туре:	PDF				
Status / ID:	Completed / 4				
Source File Access Type:					
File Size:	64 KB				
Page Count:	1				

# • [PEP-7374] ~Signing

Added an option to route a Participant to a 'Custom Session Timeout URL'. Added a SessionTimeoutUrl parameter to the Participant (Workflows and API) so the Participant can be redirected to a custom web page when their signing session expires. Please see the image below for more information.

Edit Participant Details		×
Basic Information	Workflow Rules	
Authentication	Custom Exit Url:	
User Experience		
Email Customization	Custom Session Timeout Url:	
Reminders	https://www.mydomain.com/my-custom-session-timeout-page/	
Completed Notifications	Allow participant to reassign tasks to a different person if necessary.	
Workflow Actions	Verify/Query for:	
Workflow Rules	NOTE: these may be automatically queried for if a participant's tasks requires this data.	
Event Subscriptions	Full Name Initials	

• [PEP-7307] ~Access/Permissions ~Reports ~Users



Added Group Transactions (transactions not created by you) and document download access options on permission sets for Reports. Also added the option to deny download access for system-wide or account-wide admins. Please see the images below for details on the settings referenced.

Add Perr	mission Set	×
Permis	ssion Set Permission Set Name: System-Wide System-Wide Share to all Sub-Groups (if applicable) Allow Access to: Signaps Users Constraints Signaps Sign	]
	Workflow Template Launch      The Workflows      Bernet Stress      Document Templates	
t User	Strategy Str	
Basic Information Basic Organization Username	C Information  Username:  Username:	
Basic Information Basic		

Email Address:	Email Address:
bjones@mail.com	bjones@mail.com
System-Wide Admin	System-Wide Admin
C Account-Wide Admin	Account-Wide Admin
Allow Installation Tests Access	Allow Installation Tests Access
Deny document download access without explicit permissions	Deny document download access without explicit permissions
	Cancel 🗸 Update

### • [PEP-7190] ~Integrations ~Logging

Added New Relic Browser Integration. This integration adds additional monitoring and logging through New Relic. Please see the image and link below for more details.

 New Relic Browser Monitoring Information: <u>https://docs.newrelic.com/docs/browser/browser/browser-</u> monitoring/getting-started/introduction-browser-monitoring/



accol	Add Integration	1		×	
+ ID 	Integration	Integration Provider: New Relic Browser Please select one Logging, Monitoring, and Analytics Google Tag LogRocket New Relic Browser	~		Security           Options           X           X
accoc ↓ 10 ↓ 10 ↓ 26 ↓ 23 ↓ 23 ↓ 5 ↓ 41 ↓ 93 ↓ 41 ↓ 93 ↓ 81 ↓ 22 ↓ 22 ↓ 23 ↓ 23 ↓ 23 ↓ 23 ↓ 24 ↓ 24 ↓ 25 ↓ 24 ↓ 25 ↓ 25	Integration	Integration Provider: New Relic Browser Active in Control Panel Active in Signing UI Account ID: Application ID: License Key:	· · ·	Cancel ✓ Add Integration	Security Options Options C X C X C X C X C X C X C X C X C X C X

#### • [PEP-7050] ~API/WebServices ~ControlPanel ~Reports ~Signatures

Added the ability to specify and display the time zone to be stamped onto documents either via API or workflows. These updates include adding the following: DefaultTimeZoneID to the config, TimeZoneID property for API calls, the ability to include the Time Zone in Signature Block Data Signature Date, and the ability to set the Default Time Zone for a Group. Available Time Zones options can be found in the developers guide:

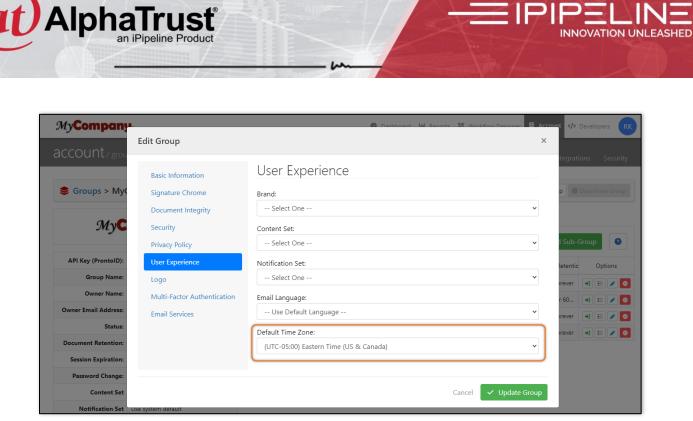
<u>https://developers.alphatrust.com/documentation/references/time-zone-ids.html</u>. Please see the images below for the settings referenced.





Tasks Editor			✓ Done
<b>k</b> -	Jane Doe	Enable DocForms     MyCompany_NDA.pdf	⇒
🔍 Task Placement	<b>^</b>	✓ Sig Block Data Options	×
<u>¶</u> <sub>≁</sub> Signature	11	Data Type:	
<u>∗ℓ</u> Initials		Lorem ipsum dolor sit amet, consectetur Signature Date Signature Date	
Approval		Font:	
目 Add Signature Block Data		Vienne commotio lostianensis. Accesser al tables vestabalare metodos uma su bachico oras. Consegur alegares, vias interins fordam possas, puspons e deforibultas, a gelotentegura delos velsis da anar deam. Paeseral importade too ques inordente consectante las transmissiones delos al tassa biland. Clause, bene velsi, secretargen en esiguia q. consectante las las tragast sed	~
Printed Name		rous impedie vennats. Praneter at vestiduum kei halla rhonzi tridige oci nov vestiduum Aneena ragita, dodriveta marximus patrenti, jaja purantesteja jasta amarius sem dokrivitae nolla. Etimi solekeisuje enimi si gula laoseet ductum si amet gaise. Kast felkus fisis, consecteur at sodiaes sud biotris set massa: Numuus volget si atam enite rutum utilitaes. Superdise porta	
Signature Date		sociales and, lacores auf missa, visinal vicipati et a anie dane rituria unicas socialestas portes protes integra conselle, field impose destrates barre retrie webscher transfer, falle accumante retrie lacio un utages integrati et al. anie al. anie barre retrie webscher meter lacio un utages integrati et al. anie al. anie barre retrie webscher meter	·
Title		text or use upper Versions solicularità incre at rell'implita si tarret biornatori mottos vestiduitan. Pron pedirettospaz esta de auto. Pron estissimo integrito integrito soli dattos trato, el comparenta llarge granda bace. Parac commo biorna soli intellucitàn, menuno sucond en acadar. Datage interna poto di mettos effectori de cumento municipati anda datto con es antilito. Datage interna poto di mettos effectori Pono di accumento municipati anda datto con es antilito. Datage interna poto di mettos effectori Pono di accumento municipati anda datto con es antilito.	~
Organization		Alquem and volupet. Ut anle pous, fauctos nec volum egal, trebas viae mauris. hiogan fisikuu, magana quis ulancoper soloniopue, anima vuolobuum tota, god daptuo jopum auguo non and. Nanc common verkaiok handent zu suo nin alse cide sus volumi venente guis seen inflorar	
Email Address		una odo, trodaut finglis tabeo utrices, oranae utarrosper doto, Palentesga accursion malescala durospe: In alguna palis fusis, egol entration nuc kegaler ac. Sel in maximo nuc, qia valpalar maximo, Sopordose auctor social est à blandi. Present sociesque sens cremente onnes end donas ment locina, sopits turpis et motis	
IP Address		dam. Nallam gavida euroró nala malexuda molla. Funce arco naj ferminatar ul senjor in, bienadar quie sido. From espacito horizo, rusora espiticidante in, recierisque valva valla Casa arculeo, soscipti vel ori zi, dictura conseguit massa. Curatafur possere ante justo, di laculis se ferminatum vel in coveralle lacuta estatu fute soluzioa, uso altatuta estatuta estatuta estatuta estatuta estatuta estatuta	
Document ID		Internal Approver Initialis	
Task ID		Sensitive (Signet and Signet S	ties
Signing Location		ever Signature Pate	
Custom Text		× Delete Data Item	
DocForms Field Placement	_		

Basic Information	User Experience	
Expirations	Notification Set:	
Notifications	None (Use Default Notification Set)	~
User Experience	Notification Language:	
Email Sender	None (Use Default Language)	~
Event Subscriptions	Public Launch Brand:	
Metadata	None (Use Default Branding)	*
Launch Display	Default Time Zone:	
Launch Rules	Use Default Group Time Zone	~
Launch Web Forms	Prompt Participants for Cancellation Reason	



#### • [PEP-6939] ~ControlPanel

Added a link to the *Developers Guide* in the Developers section in the footer of the Control Panel. Please see the image below for more details.

			Back to top ↑	
Workflow Designer	Account	Developers	Support	
Workflows	Groups	API Credentials	Version: 5.18.0	
Web Forms		API Logs	License: #1651	
Documents	Permission Sets	System Logs	Control Panel Help Guide	
Content	Integrations	Developers Guide	Release Notes	
Notifications	Security		Feature Requests /	
			Suggestions	
			Installation Tests	

#### • [PEP-6708] ~Infrastructure ~Integrations

Added the ability to utilize archive storage including AWS S3 Storage. These setting can be found in the config under *ArchiveSettings*. Please see the image below for an example.

"ArchiveSettings": {
"DaysAfterComplete": 7,
"EarliestStartTime": "22:00",
"IsActive": false,
"LatestEndTime": "04:00",
"Location": "",
"LockDurationInDays": 0,
"MaximumAttempts": 0,
"MaximumConcurrentOperations": 0,
"MaximumRowsToFetch": 0,
"SleepDelayInMinutes": 0
},





# • [PEP-6570] ~ControlPanel ~Forms ~UI/UX

Added *Read-Only* field type to Web Forms. This field type cannot be edited by any participants in a transaction. Please see the image below for additional details.

My <b>Company</b> . Inc.		😵 Dashboard 네 Reports 1컵 Workflow Designer 🖡 Account  Developers 💦
workflow desig	gner / web forms	Workflows Web Forms Documents Content Notifications Brands
B Web Forms > My U	ntitled Form	▲ Test
Add Fields		
Grouped/Misc. Fields	~	Web Form This is my form. Please fill it out.
Name		ID Number:
Address		Read-Only:
Hidden		
Separator		Save and Continue Exit
Text		
Read-Only		

#### • [PEP-6262] ~API/WebServices ~ControlPanel ~Documents ~Forms ~UI/UX

Added validation options into DocForms. This includes the following: added support for rules via API, the ability to insert specialized field types onto a DocForm, the ability to manage DocForm validation properties, increased validation rules when editing DocForm fields, and the ability to manage Rules for inputs in DocForms. Please see the images below for the settings referenced and an example of field validation.

🙊 Tasks Editor		✓ Done
<b>K</b> -	💄 Jane Doe	e 🗸 🕑 Enable DocForms 🖺 New Patient Form 🗸
🔍 Task Placement	<b>^</b>	Field List
<u>₿≁</u> Signature		New Patient Form There are currently no fields assigned to
<u>×</u> ℓ Initials		Date [Date] Full Name] Prove [Phone] this Participant.
😵 Approval		Dave of Burk [Date of Birth Cender [Gender] - Envil [Femail] Advent [Address]  Advent [Address]  Fund [Kine, Advent, 8 Prace: MyCompany Inc. 1234 Company Street, 860-123-4567
DocForms Field Place	ment	Enginee Name, Adema, Bithone:
Standard Fields	Formatted Fields	✓ E Rules     Rule     Rule     @ Depicate © Conex
Textbox	Number	IF Select a Field v is v +
Checkbox	Currency	r voc. r voc. revo.
<ul> <li>Radio Buttons</li> </ul>	🛱 Date	Add Rule
<ul> <li>Drop-Down List</li> </ul>	🖾 Email Address	Cancel 🗸 Save Changes
Multiline Textbox	🗞 Phone Number	
🛪 Other Tasks	Social Security N	Lumber Experience Langes of Teer Surge
Forms / Actions		
📜 Delivery		Do peer Data minara, hosto, or stamina? Use UNA Referred By: This you sumd minara, hosto, or stamina? No No This you sumd minara? (If exact Pairs) This you sumd minara? (If exact Pairs) This you sumd minara?





r	Edit Form Field Details		Edit Form Field Details		×
Tasl	Basic Information Style Placement	Validation Max Length:	Basic Information Style Placement	Basic Informa Field Type: PhoneNumber	ation
orm: Ids	Validation	Mask: Include Mask Characters RegEx Validation: ^(\(?\d\\d\)???(  -[)?\d\\d\( - )?\d{4,4}((  - \) RegEx Error Message:	)?[ext\]+ ?\d+)?\$	(reset) (reset)	÷
ss ber ity N <b>3</b> Otf	her Tasks	Please enter valid phone number. Ex: 123-456			Task • operties

# • [PEP-6150] ~ControlPanel ~Reports ~Signing ~Workflows

Added the ability to refresh the participant access link when resending the notification from the Reports > Status > Transaction Details > Participants section. This will allow the user to update the Participant information and resend the Participant Notice with a new link. This new feature will also invalidate the original signing link once the new link is sent. Please see the image below for more details.

My <b>Company</b> . Inc.	0	Dashboard Ш F	Reports 12	Workflow Designer	🖪 Account 📢	> Developers	RK
reports / status	Transactio	n Document	s Partio	cipants Emails	Audit Report	t Event History	1
Q Search Results > Transaction Details: Participant:	S				Ê	2 🖶 0	-
Privacy Policy						Cancel Transaction	1
PARTICIPANT: Jane Doe		Participant ID	Full Name	Email Address	Phone Number	Status Option Resend Participant N	
Participant ID: 1000182890		<u>1000182890</u>	Jane Doe	jdoe@mail.com		Sent 🖉	
Transaction ID: 1000269565							
Status / ID: Sent / 6 Full Name: Jane Doe							
Q Search Results > 1 Resend Participant Notice?					×	8 🔒 0	
Privacy Poli Are you sure you wish to resend thi	is participant notice	to <b>Jane Doe</b> at <b>jo</b>	doe@mail.	com?			
1000269565 Refresh Participant Access Link (	(recommended if em	ail/phone has be	en change	d)		Cancel Transaction	
🎝 PARTICIPANT: Ja		1000182890	Cance Jane Doe	Resend Not	ice Number	Status Option	s





#### Improvements

#### • [PEP-7600] "Documents "Emails "Infrastructure "Transactions

Improved HSM failure handling and fixed issue where completed email messages were not being sent when a transaction was completed.

#### • [PEP-7499] ~ControlPanel ~UI/UX ~Workflows

Improved the drop-down options for Participant selection. Added Email Address, Title, and Org to participant selection list on the launch page. Please see the images below for more information and an example.

Basic Information	Launch Rules	
Authentication	This Participant is optional at launch.	
User Experience	Input Type:	
Email Customization	Launcher will select from a list of options (specified below).	~
Reminders Completed Notifications	Selection Option 1	O Delete
Workflow Actions	Name:	
Workflow Rules	John Smith	
		ormation included in rticipant drop-down
Event Subscriptions	jsmith@mail.com	selection.
Placeholders	Phone Number:	
PDF Fields	1597534862	
Launch Rules	Title:	
Launch Display	Manager	
Launch Domain Restrictions	Organization:	
Launch Labels	Company Inc.	
	Add Option	
Save as Preset	Cancel	<ul> <li>Update Participant</li> </ul>
orkflow Templates > Test Launch	1	St Live
Privacy Policy		
Signer 1	Signer 1:	
	Select a Participant	
	Select a Participant	

#### • [PEP-7365] ~ControlPanel ~UI/UX

Improved the Profile and Group Switcher by consolidating and moving the Profile and Group Switcher links to a standard Account Button. Please see the image below to compare the old and new Profile and Group Switcher.



MyCompany. Inc. Ø Dashboard	
dashboard / quick stats	New Profile and Group Switcher           Quick Stats         Workflow Templates
This Year  Group Transactions All Groups	Switch Group: MyCompany Inc MyCompany Inc Log Out
My <b>Company.</b> Inc. & Dashb	
dashboard / quick stats	Quick Stats Workflow Templates Pending Signatures
This Year  Group Transactions This Group	<ul> <li>✓ ♂ Send Document for e-Signature</li> </ul>

#### • [PEP-7356] ~ControlPanel ~Transactions

Improved the Participant's organization name by increasing the character limit for the organization on Participants and Users from 64 to 128.

#### • [PEP-7352] ~API/WebServices ~EventSubscriptions

Improved webhooks by adding the ability to include custom header information in Event Subscription HTTP requests. Please see the example below for more information. Please see the example image below for more details.

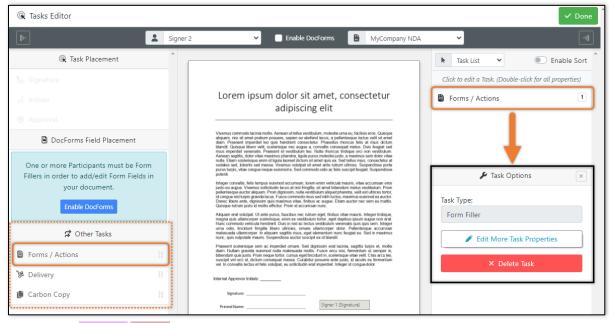
], "WorkflowActions": [
······································
"Type": "SubscribeToStatusChangeNotificationsByPost",
"CustomHeaders": [
Name": "Cache-Control",
"Value": - "no-cache"
······································
"Value": "en-US"
Hardo . Chi do
Σ, 
Name": "Accept-Charset",
"Value": "utf-8"
value . ull-o
5, 
Name": "My Custom Header",
"Value": "My custom Header ,
value : My crazy value

• [PEP-7282] ~ControlPanel ~Documents ~Forms ~UI/UX ~Workflows

Improved the ability for a participant to form fill without needing another separate task by adding a *Forms / Actions* task type to the Workflow Designer > Workflow > Task Setup options. Also reorganized the *Delivery, Carbon Copy*, and the new *Forms / Actions* task types into their own section called 'Other Tasks' and moved them to the bottom of the list. Please see the image below for more details.







#### • [PEP-7191] ~Logging ~UI/UX

Improved the precision of timestamps on filenames for JSON logs by adding seconds to the API JSON logs filename. *Current Filename Format*: 'CreateTransactions-Request-<machinename>-yyyyMMddHHmm'

New Filename Format: 'CreateTransactions-Request-<machinename>-yyyy-MM-dd-HH-mm-ssSSS'

#### • [PEP-7140] ~API/WebServices ~ControlPanel ~Notifications ~UI/UX

Improved the resend participant option by adding the ability to refresh the participant access link when resending the notification from the Status Reports Participant section. Please see the image below for more details.

MyCompany.m.	Ø	Dashboard 🔟 F	Reports 💆	Workflow Designer	🖪 Account <	/> Develop	ers RK
reports / status	Transactio	n Document	s Parti	cipants Emails	Audit Repor	t Even	t History
Q Search Results > Transaction Details: Participants					<u>i</u>	2	₽ 0
Privacy Policy 1000269565						Cancel	Transaction
PARTICIPANT: Jane Doe		Participant ID	Full Name	Email Address	Phone Number	Status Resend Part	
Participant ID: 1000182890		<u>1000182890</u>	Jane Doe	jdoe@mail.com		Sent	
Transaction ID:         1000269565           Status / ID:         Sent / 6							
Full Name: Jane Doe							
Q Search Results > T Resend Participant Notice?					×	2	€ 0
Privacy Poli Are you sure you wish to resend this part	ticipant notice	to <b>Jane Doe</b> at <b>j</b> e	doe@mail.	com?			
1000269565 Refresh Participant Access Link (recor	nmended if em	ail/phone has be	en change	d)		Cancel	Transaction
PARTICIPANT: Ja			Cance	Resend No	tice Number	Status	Options
		1000182890	Jane Doe	jdoe@mail.com		Sent	





#### • [PEP-7124] ~Infrastructure ~Installer

Improved the installer so that it will not overwrite X-Frame-Options and Content-Security-Policy for CP, InstallationTests and Sign vue apps.

#### • [PEP-6708] ~Infrastructure ~Integrations

Improved storage options by adding support for archive storage including AWS S3 Storage. These setting can be found in the config under *ArchiveSettings*. Please see the image below for an example.

"ArchiveSettings": {
"DaysAfterComplete": 7,
"EarliestStartTime": "22:00",
"IsActive": false,
"LatestEndTime": "04:00",
"Location": "",
"LockDurationInDays": 0,
"MaximumAttempts": 0,
"MaximumConcurrentOperations": 0,
"MaximumRowsToFetch": 0,
"SleepDelayInMinutes": 0
},

• [PEP-6615] ~ControlPanel ~Emails ~UI/UX ~WorkflowActions

Improved the *Email Message* field on the Define Participant Workflow Action to use a rich-text editor instead of a plain text input box. Please see the image below for more details.

Edit Participant Details		×		Define Pa	articipa	ant
Basic Information Authentication User Experience Email Customization	Workflow Actions Action 1 Type: Define Another Participant	17 O Delete	dit	Enter the information for t	the Participant bel Full Name: Email Address:	ow.
Reminders Completed Notifications	Participant to Define: Signer 2 v		0	E	mail Message:	
Workflow Actions	Full Name v options     Email Address v options					
Workflow Rules	Phone Number					
Event Subscriptions	<ul> <li>Title</li> <li>Organization</li> </ul>		dva			P 4
Placeholders	Authentication     Two-Factor Authentication					Update Participant Cancel
PDF Fields	Custom Email Message v options Customize Page Content					v5.1800

# • [PEP-5751] ~ControlPanel ~Workflows

Improved the document upload functionality by replacing (or adding to) the standard file upload controls with drag & drop file upload controls. Please see the image below for an example of the drag & drop file upload control.





	🔀 Launch 🛛 🖾 Test 💠 🔛 📥 Export 🔅 🥒 Edit 🕞 Save
	⊮ Add Documents
File Name	Is Upload Manage Tasks Options
MyCompany_NDA.pdf	Tag Document 1
∧ Add Document(s)	
Choose from the Documents repository	Upload the Document on the launch page
Select an existing Document Templa 🔻	+ Use a Blank Template
	<ul> <li>Add Document(s)</li> <li>Choose from the Documents repository</li> </ul>

### **Bug Fixes**

#### • [PEP-7578] ~Infrastructure

Fixed issue where an expired license was preventing the application and service from running properly.

# • [PEP-7577] ~Forms ~UI/UX

Fixed issue where checkboxes and radio buttons selected by a prior participant were hard to see when the next participant was signing. Read-only field data is now more clearly visible in the DocForms UI. Please see the image below for an example.

ATTENTION: Please n	nake sure you fill out all of the form fields and then click the "Save	& Continue" button		Save & C	Continue →			
	Aenean sagittis, dolor vitae maximus pharetra, ligula purus molestie justo, a maximus sem dolor vitae nulla. Etiam scelerisque enim id ligula laoreet dictum sit amet quis ex. Sed tellus risus, consectetur at sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante rutrum ultrices. Suspendisse porta purus turpis, vitae congue neque euismod a. Sed commodo odio ac felis suscipit feugiat. Suspendisse potenti.							
	Internal Approver Initials:	$\overline{\mathbf{Y}}$	× +	The checkbox and rad button that the first partici selected are clearly mart	ipant			
	Signature:				NCC.			
	Printed Name:	<b>~</b>	0					
	Date:	-						

#### • [PEP-7576] ~Workflows

Fixed issue where HTML signings were not functional.

#### • [PEP-7567] ~Forms

Fixed issue where Web Form rules involving required fields logic would not compute properly. Please see the example image below for more details.





workflow des	signer / web forms		Workflows Web Forms	Documents Content N	lotifications Brands
🖥 Web Forms > My	Untitled Form		📕 Test	Device 💠 🛃 Export 🕴 👯 R	ules 🖌 Edit 🕞 Save
Add Fields					
Standard Fields	~	Web Fo			
Textbox		ID Number:			
Multiline Textbox		Organization:	Select an Option 🗸		
Checkboxes		Manager:	Select an Option 🗸		
Dropdown List		Hunager.	select an option •		
workflow de	Field Rules Editor			×	
	Rule 1			🗊 Duplicate 😫 Delete	otifications Brands
🔓 Web Forms > M		blank V +			les 🖌 Edit 🕞 Save
Add Fields	THEN require V Organiza				
Standard Fields	Rule 2			🔮 Duplicate 🔹 Delete	
Textbox	IF ID Number 👻 is	not blank 🗸 +			
Multiline Textbox	THEN require V Manager	<ul><li>✓</li></ul>			
Checkboxes	Add Rule				
Dropdown List			Cance	✓ Save Changes	

# • [PEP-7553] ~Forms ~UI/UX ~WorkflowActions ~Workflows

Fixed issue where Task Workflow Actions would not properly save when adding them to a *Forms / Actions* task. Please see the image below for an example and the referenced settings and steps to add a Workflow Action to a *Forms / Actions* task.





Ke Signer	2   Enable DocForms MyCompar	ny NDA 🗸
🔍 Task Placement		Task List 👻 💿 Enable So
		Click to edit a Task. (Double-click for all properties,
	Lorem ipsum dolor sit amet, consectetur	🛢 Forms / Actions
	adipiscing elit	
DocForms Field Placement	Vesanus commodo lacinia molis. Annean ut talias vestibulum, notiertia uma esu facilisis eros. Quicque alquem, nas uta ante pretem possane, supen es defendo lacis, a patienterosa lectar veit set anne dans. Passenti imperdati los qua handrante conscitatur. Passauta internosa titei at intera datar bandi. Cualqua tener veit, scalemaga nec augua a, convelta consegat entes. Das facigat se risus argorider venentas. Passent et vestibutam los halls chances titeis at traveitadum risus argorider venentas. Passent et vestibutam los halls chances titeis at restabutan.	
One or more Participants must be Form	Aeroen soptis, dolor vibe maximus pherote, ligule puus molestie juste, a maximus sem dolor vitee nulla. Etem scelenique enni di ligula latoret dictum si annet quis ex. Sad tallos risus, consectutar at soddes sad, biotris sad massa. Viversus veilupat si amat ante natum attricas. Suspendisse pote puus turas, vitea conque negue exemnod a. Sad commodo dola ar disis suscept teaura. Suspendisse	Task Type:
Fillers in order to add/edit Form Fields in your document.	potenti. Independential, futile komplex excisioned accompany, beam serim webscale meaning, vibra accountain sensi pado esu angele. Vivannos solicitades laccas et neis fregales, est annat babendam measar verabilitarin. Prom poleterologue auccar alguman. Priori digescars, malia verabilitaria algund patentaria, ville est uniteras terotor,	Form Filler
Enable DocForms	id congue rist tarpis ganida lacus. Fuice commodo nisus sed ribh luchis, maximus eusenod ex auctor. Donec been and, dapisser quist maximus view. Initiava ce augue. Etem auctor nec sem eu mattis. Quisque nutrum justo di moltis efficitur. Proin id accumisan nunc.	Edit More Task Properties
Cther Tasks	Aligum net visitigal. Ut lette purst, structure net nitrum eight, finitus vitee maars, I helinger finitigen, magna ogsi sillencoper einerlengen, ernen ere verblachen hörde, ergel helpolos sjours auger non erst. Nanz commodo verkuste hendreit. Dass in mit alle letters verblachen vereenstie agsi gals sein. Helgen ruma odo, incrident finigelis beer utifices, nome utiencoper der Petiertelige eine commen meteurade utilizencoper. In aliguan sagetts issus, eiget elementam nanz fuugte au. Sod in maximus nanz, su vipolate maans. Sogendelse austure suopet ein ditartet.	× Delete Task
Forms / Actions	Parameter consistingue serie au l'apartiele comme diad digensitier met autorità subglità larger al, notifia dire hallano grande essanori ante menanazia ancier. Tavosi mentra nel semantari a di serigora la, bibendam que pada l'hora negate tortar, carana egettencitari in, scolerazia esta este alla saccia de subglitari esta esta di ante anna caratitari possere ante anna di accisi se termetaria subglitari esta di accisi esta menta caratitari possere ante anna, la accisi se termetaria.	
Delivery	vet. In conveille tectus et hels, volvigat, eu solicitudin erail impendiet. Integer la congue dolor	
Carbon Copy	Edit Task Details	x
	Basic Information Workflow Actions	
	Workflow Actions Action 1	Lf 🧿 Delete
	Event Subscriptions Type:	
	Launch Document Review	Show Advanced
	Add Workflow Action	

# • [PEP-7504] ~Documents ~Workflows

Fixed issue where workflows with blank templates would not launch properly. Please see the image below for the setting referenced.

Work	flows > NDA		
💄 Pa	articipant 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	
	+	Add Participant	+ Add Me + Add Advanced
	ocument Setup d Documents from your uter	Choose from the Documents repository	★ Add Document Upload the Document on the launch page

# • [PEP-7494] ~ContentSets ~Workflows

Fixed issue where workflows that were exported with missing content sets would not import as expected.





# • [PEP-7486] ~Forms ~UI/UX

Fixed issue where when editing a duplicated rule, the original rule would also update. Please see the image below for the settings referenced.

<i>М</i> у <b>Company</b> ,	ю.	⑧ Dashboard 실 Reports 12 Workflow Designer 🗍 Account  → Developers 🥂
workflow des	signer / web forms	Workflows Web Forms Documents Content Notifications Brands
🖥 Web Forms > My	Untitled Form	📱 Test 🖵 Device 💠 🛓 Export 🗄 🗮 Rules 🖊 Edit 🔒 Save
Add Fields		
Standard Fields	~	Web Form This is my form. Please fill it out.
Textbox		ID Number:
Multiline Textbox		Untitled:
Checkboxes		Save and Continue Exit
Dropdown List		
workflow de	Field Rules Editor	×
	Rule 1	etifications Brands
🖥 Web Forms > M	IF ID Number 🗸	is equal to V 3 +
Add Fields	THEN hide V Unti	
Standard Fields	Add Rule	
Textbox		Cancel 🗸 Save Changes

# • [PEP-7483] ~Transactions ~UI/UX ~WorkflowActions ~Workflows

Fixed issue where when using the *Prompt Participant to choose status* workflow action, the status would not update and the signing would be suspended instead of correctly prompting the participant to select the status. Please see the image below for the setting referenced.

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)	~
Launch Domain Restrictions	Cancel Behavior:	
Launch Labels	Prompt Participant to choose status	~
	Error Behavior:	
	Redirect directly To Exit page URL	~
	Document Options:	
	<ul> <li>Display document download(s) on the Exit page upon completion</li> <li>Allow access to all Transaction documents regardless of participation</li> </ul>	



# • [PEP-7460] ~Forms

AlphaTrust an iPipeline Product

Fixed issue where number fields in a Web Form would not properly validate the set min/max values and a user could type in a number higher or lower than the min/max values. Please reference the image below for an example.

My <b>Company</b> . Inc.	🚳 Dashboard	🔐 Reports 🗗 Workflow Designer 🖪 Account  Developers  RK
workflow designer		Web Forms Documents Content Notifications Brands
Web Forms > My Untitled	Form	Test Device 🗰 🛓 Export 🗰 🎏 Rules 🖉 Edit 🕞 Save
Add Fields	Web For	~
Formatted Fields 🗸	This is my form. Please fill	
Number	ID Number:	🖊 Edit 🕂 🗙
Currency	Save a	nd Continue Exit
Date		
<i>Му</i> Сотрани	n Dachha H	Int Desente 17 Waldflow Designer E Account Ch Developers
Form Editor	Field 1: "Number" [number]	✓ × Brands
Display	Display	
B Web For Validation	Field Type:	t 🕞 Save
Add Fields	Number	
Formatted	Label:	
	Min Value:	Aax Value:
Email Addre:	1	5
Phone Numb	Field Width:	

#### • [PEP-7445] ~Groups ~UI/UX

Fixed issue where the Sub-Groups table would not resize in a responsive manner when a user zooms in on the screen. Please see the image below for the table referenced.



My <b>Compan</b> y	Inc.			<b>Ø</b> D:	ashboard 🔟 Reports	5 🛿 Workflow	w Designer 📱	Account	Developers RK
account / grou	ps				Groups	Users	Permission Se	ts Integrati	ons Security
Sroups > MyC	Company Inc	_					*)	Edit Group	Deactivate Group
ӍуС	ompany, Inc.		-Groups	lter Sub-Groups		Active	~ 2	+ Add Sub-0	Group
API Key (ProntolD):	NUCLINIARY IN		♦ ID		Account Nan	Owner Name	🗢 Owner Emai	Doc Retentic	Options
Group Name:	MyCompany Inc		-	Human Resources	Human Res	Human Res	HT@myco	keep forever	• = / •
Owner Name:	Owner Name Here		the Company	Accounting	Accounting	Accounting	noreply@m	keep for 60	
Owner Email Address:	noreply@mycompanyinc.com		-	Project Management	Project Ma	Project Ma	noreply@m	keep forever	
Status:	Active		-	Marketing	Marketing	Marketing	Marketing	keep forever	● ≡ ∕ ○
Document Retention:	Keep for 40 days after completed	l,						inter of the	

#### • [PEP-7439] ~ContentSets ~WorkflowActions

Fixed issue where an incorrect French translation was seen in the default *Workflow Actions (Explanation)* Content Set. Changed the French translation from "heures" to "fois". Please see the image below for more details.

MyCompany 🕲 Dashboard 🗠 Reports 🗗 Workflow Designer 🖪 Account						
JNEr / content			Workflows Web Forms Documents Content	Notifications Brands		
panyInternal				🛓 Export 🔛 🛃 Rename		
+ Add Language			Content Page Template	Last Modified Options		
			Access Denied			
✓ ×			Authentication (Common)			
			PDF Signing			
×			Reassign Participant			
			Server Errors			
` <b>↓</b>	-	•	Workflow Actions (Explanation)	2023-12-17 🛅 💉 🗙		
			Workflow Actions (Upload Additional Documents)			
	anyInternal + Add Language	AnyInternal	AnyInternal	AnyInternal     Content Page Template     Content Page Template       Add Language     Content Page Template     Content Page Template       Access Denied     Authentication (Common)       PDF Signing     Reassign Participant       Server Errors     Server Errors		

#### • [PEP-7436] ~Emails ~Notifications

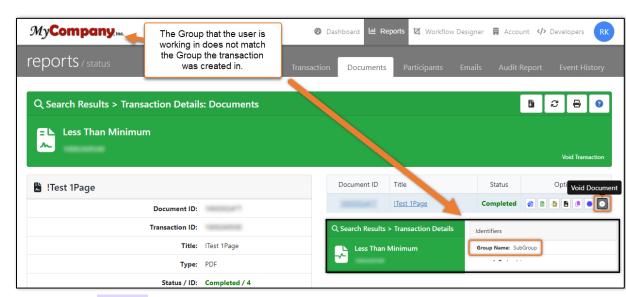
Fixed issue where expiration notices were not being sent for expired transactions.

# • [PEP-7372] ~Access/Permissions ~Authentication

Fixed issue where the failed login attempt status code could cause confusion when received. Changed failed login attempt status code from 400 to 403 to provide the forbidden response.

#### • [PEP-7266] "Documents "Reports "Transactions

Fixed issue where when attempting to void a document, in the Reports > Status > Transaction Details > Documents section, it fails when you are voiding a document that exists in a transaction that was created in a group that is other than the group the user is currently logged into. The document should successfully void since the user has permissions to both groups. Please see the image below for an example.



# • [PEP-7206] ~Installer

Alpha

**Frust** 

Fixed issue where the AlphaTrust installer incorrectly configured the Startup Type for specific AlphaTrust services as 'Automatic' rather than the intended 'Automatic (Delayed Start)'.

#### • [PEP-7026] ~ControlPanel ~Groups ~UI/UX

Fixed issue where the Groups page was missing the pagination bar when using the search filter. Please see the image below for an example.

My <b>Comp</b>	any. Inc.	🕐 Dashboard	🔟 Report	s 🛿 Workflow	w Designer 📲	Account	Developers RK
account	groups		Group	s Users	Permission Se	ets Integrat	ions Security
<b>▼</b> d				× Act	ive 🗸	C + Add	Group
\$ ID	🔷 Group Name	\$	Account Nar	💠 Owner Nam	e 🔷 Owner Emai	I 🔶 Doc Retentio	Options
\$ 100x1	Default Account	D	efault Acc	Test Applic	-	keep for 36	*) E 🖊 🖸
\$ Internet.	Default Sibling	D	efault Sibl	Default Sibl	$(A,B,\mu) \in \mathbb{R}^{n+1}$	keep for 10	*) E 🖊 🖸
S Interior	Default Spanish	D	efault Spa	Default Spa	-	keep for 30	•) E 🖊 🖸
\$ Terraria.	Default Spanish2	D	efault Spa	Default Spa	setur angle	keep for 30	• E 🖊 🖸
« < 1 2	3 → » 10 ¢ items per page						1 - 10 of 24 items

#### • [PEP-6927] "Documents "Reports "Transactions

Fixed issue where HTML documents could not be verified in the control panel. Please see the image below for the referenced setting.





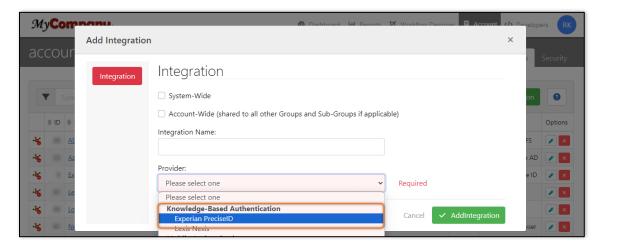
My <b>Company</b> , Inc.		🕐 Dashboard 🔟 Re	eports 🖾 Workflow Design	ner 🖪 Accour	nt
reports / status		action Documents	Participants Ema		
Q Search Results > Transaction Details	: Documents				b C 🖶 Ø
よ !Test 1Page		Document ID	Title	Status	O Verify Document
Document ID:	100000.0477		ITest 1Page	Completed	a h 5 h 🚺
Transaction ID:	1000200000				
Title:	!Test 1Page				
	PDF Completed / 4				- <b>*</b>
reports / verify document					
	ion		Status Trends C	Completion Rat	
Document File Verificat					0
		eck) on a copy of a do			0
Document File Verificat Use the form below to perform document file		eck) on a copy of a do			0
Document File Verificat Use the form below to perform document file	verification (digital signature ch	eck) on a copy of a do			0
Document File Verificat Use the form below to perform document file	verification (digital signature ch	eck) on a copy of a do			0
Document File Verificat Use the form below to perform document file	verification (digital signature ch Document ID: File to Verify:	eck) on a copy of a doo vour files or <u>Browse</u>			0

#### • [PEP-2348] ~Integrations ~Signatures

Fixed issue where a Participant's suffix would appear as a digit instead of a Roman numeral when authenticating via Experian. Please see the images below for an example and reference to the integration setting.

	Should be the Roman numeral 'III' and not the number '3'	Identity Verification Required Please fill out all the information below. NOTE: The address inform Legal Name		
Brieferie Winderic	ar malaster	First Name: Le	98	
Signature	Click/Here to Signature	Middle Name:		
Name	Lee Kizel, 3	Last Name: Ki	izer	
Title	Title	Suffix:		
Date	9/23/2020 Date			





#### v5.17.15 Release

# Release Date: 3/21/2024

# Important Notes:

The update in version 5.17.15 is not included in version 5.18.0.

#### Bug Fixes

#### • [PEP-7718] ~Documents ~Signing

Fixed issue where a query for the Document Review page was running slowly. Updated the query to return fewer field properties to increase database query performance.

#### v5.17.14 Release

# Release Date: 3/20/2024

#### Important Notes:

The update in version 5.17.14 is not included in version 5.18.0.

#### **Bug Fixes**

# • [PEP-7718] ~Documents ~Signing

Fixed issue where a query for the Document Review page was running slowly. Updated a query to be more performant.

#### v5.17.13.1 Release

# Release Date: 2/26/2024

#### Important Notes:

The update in version 5.17.13.1 is not included in version 5.18.0.

# **Bug Fixes**

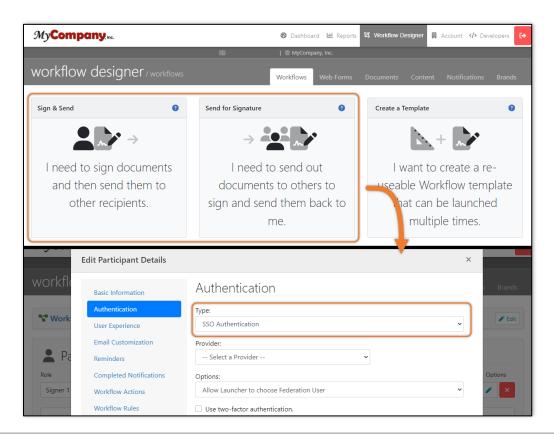
#### • [PEP-7736] ~Authentication ~ControlPanel

Fixed issue where SSO logins would fail on a workflow when it is Ad-Hoc launched. The participant would see a "Process Cannot Continue" error when they opened the SSO link. Please see the image below for the referenced settings.

NOVATION UNI FASHED







## v5.17.13 Release Bug Fixes

# *Release Date: 2/15/2024*

#### • [PEP-7672] ~Signatures

Fixed issue where the "Test Document Only" banner was being applied to HTML document transactions. Please see the image below for an example of the issue seen.



# v5.17.12 Release

*Release Date: 12/14/2023* 

## Bug Fixes

• [PEP-7482] ~ControlPanel ~UI/UX ~Workflows ~WorkflowActions

Fixed issue where users were unable to add Workflow Actions to participants. When the user attempted to click on the Add Workflow Action button nothing occurred. Please see the image below for more details.





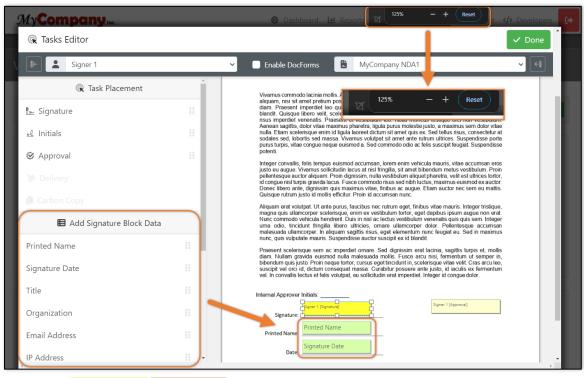
MyCompo	any, Inc.			-	rd 네 Reports 1것	Workflow De:	signer 🖷	Account	Developers 🕞
workflow	desig	gner / workflows		இ MyCompany, Inc. Workflows	Web Forms Do	cuments	Content	Notificatio	ns Brands
ST Workflows	s > Docu	ıment(s) I need to sign			🗹 Lat	inch 📕 Tes	t :: 🛓 E	ixport ii 🥒 E	dit 🕞 Save
💄 Partic	cipant	Setup							
Reorder Rol	le	Full Name		Email Address	In-P	erson Fir	nal Email	Include Docs	Options
<b>1</b> 5	Signer	Full Name entered at launch		Email Address entered at launch					🖌 🗙
<b>‡</b> 2 5	Signer 1	Full Name defined by another Par	rticipant	Email Address defined by another Partici	pant				<ul> <li>×</li> </ul>
		-	Add Dartici	popt			d	- Add A	duancad
		Edit Participant Details					×		
workflow		Basic Information Authentication		flow Actions				Notificatio	ns Brands idit 🕞 Save
		User Experience Email Customization							o save
🙎 💄 Partic	cipar	Reminders							
Reorder Rol	le	Completed Notifications						nclude Docs	Options
<b>‡</b> 1 S	Signer	Workflow Actions							<ul> <li>×</li> </ul>
<b>t</b> 2 5	Signer 1	Workflow Rules							

### • [PEP-7343] ~Signatures ~Signing

Fixed issue where Signature Block Data would not appear where it was originally placed on the document. This issue occurs if the user was zoomed in over 100% on the page when placing the Signature Block Data in the Task Editor. Please see the image below for more information.







#### • [PEP-7105] ~ControlPanel ~Transactions

Fixed issue where invalid characters in the role field would cause launch issues. Roles may now only contain Alphanumeric, dashes, underscores, spaces or #. Please see the image below for an example and more information.

work	cflo	w desig	gner		Workflows Web Forms	Documen	ts Content	Notificatio	ons Brands	
<b>*</b> W	orkflo	ows > MyCo	ompany NDA - C	ΟΡΥ		🖸 Launch	🗳 Test 💠 🛓	Export 💠 🥖	Edit 🕞 Save	
	Participant Setup									
Reo	rder	Role	-ull Name		Email Address	In-Person	Final Email	Include Docs	Options	
ŧ	1	Manager	Jane Doe		jdoe@mail.com				<ul> <li>×</li> </ul>	
1	2	Signer 1	Full Name defined	by	Email Address defined				<ul> <li>×</li> </ul>	
1	3	Signer 2	Full Name entered	at	Email Address entered				<ul> <li>×</li> </ul>	
			+ Add Parti	icipa	nt	+	Add Me	+ And A	dvanced	
Edit	Parti	cipant Deta	ils						×	
В	Basic Information Bas			: In	formation					
A	User Experience			Person: (This participant will complete their actions in-person instead of via email or					nail or	
U										
E	mail C	ustomization	Role: Manag	ier						
R	emind	ers	Linding							





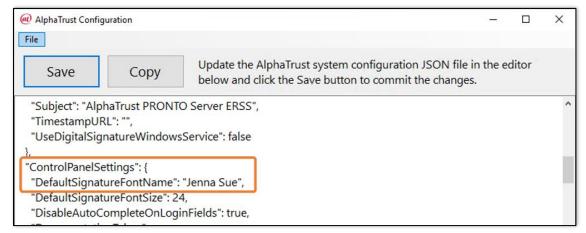
# v5.17.11 Release

Release Date: 11/20/2023

#### **Bug Fixes**

#### • [PEP-7449] ~Signing ~UI/UX

Fixed issue where Font-Stamped Signatures would default the font to Jenna Sue if no font was provided in the API call, regardless of the actual font setting. Added functionality to use the Default Font set in the config if the font is not provided in the transaction. Please reference the image below for an example of the Default Font set in the config.



#### • [PEP-7112] ~AuditReport ~ControlPanel ~Reports ~UI/UX

Fixed issue where the Audit Report would incorrectly show a document's type as HTML. Please reference the image below for an example and more information.

						<b>Ø</b> D	ashboard l	비 Reports 법	Workflow Designer	Account	> Dev	elopers 🚺
				23		\$						
e	eports	status				Transaction	Documen	s Participai	nts Emails	Audit Report	Ever	nt History
c	ે Search Re	sults > Transa	action Details: A	udit R	leport					ß	ខ	80
	·	report html										
	100059	5440									Void	Transaction
	Document ID	Document Title			Task ID	Task Type		Participant ID	Participant Name			Options
~		DUMMY w fields		Ż	381236787	Signature	2	300562202	Luke B			
=l ~	DOCUME	NT: DUMMY	w fields									
		Title:	DUMMY w fields									
	Document ID:											
	Type: HTML Type should be PDF instead of HTML											
		Туре:	HTML	l ype sh	iouid be PDF i							
			HTML Completed / 4	l ype sh	Iouid be PDF I							
		Status / ID:			iouia be PDF i		_					





## v5.17.10 Release

Release Date: 11/16/2023

#### **Bug Fixes**

[PEP-7407] "Transactions

Fixed issue where closing transactions could cause 502 Gateway Errors.

#### • [PEP-7401] ~API/WebServices ~Signing

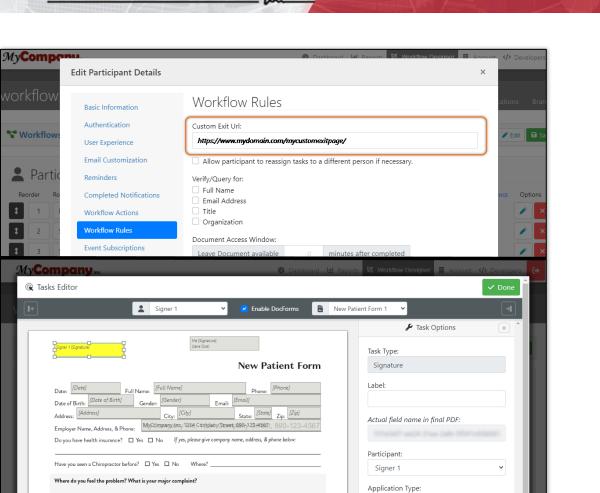
Fixed issue where a signers IP address would not be displayed in the signature annotation and signature block data when it should have been included. Please see the image below for an example of the correct signature block and annotation containing a signers IP address.



## • [PEP-7396] ~Workflows

Fixed issue where if a participant declined to complete an optional signing task, the system would incorrectly navigate the participant to the participant's custom exit URL if it was set. Please see the image below for an example and the settings referenced.





Font-Stamped (Default)

Edit More Task Properties

Clone Task

Optional

~

## • [PEP-7376] ~Notifications ~Transactions

Date of Injury: \_\_\_\_\_

Have you ever had any falls, auto accidents, or major injuries?

□ Yes □ No

Attorney's Name & Address (if any): \_\_\_\_

Year:

Please indicate if you are here because of: 🛛 An on the job injury 🗋 An auto accident 🗋 A home injury

Type of Accident:

\_\_\_\_ Insurance Company: \_\_\_

Fixed issue where final emails would not properly be sent when a transaction was manually closed. Please see the image below for an example and the setting referenced.

Describe Injury:

My <b>Company</b> . Inc.	🕐 Dashboard	L Reports 12, V	Vorkflow Designer 🛛 🛱 Account 🔸 Developers 🚺
	📧   📚 MyCompany	, Inc.	
reports / status		Status Tr	ends Completion Rates Verify Document
😵 🔹 📕 Search by Transaction ID or d	2023-10-01 ~ 2023-10-3	1 🛱 Pending	<ul> <li>✓ Advanced</li> </ul>
		\$ Group	Created Date
MyCompany NDA - COPY		MyCompany, Inc.	2023-10-26 04:58 PM EDT Pending

INNOVATION UNLEASHED





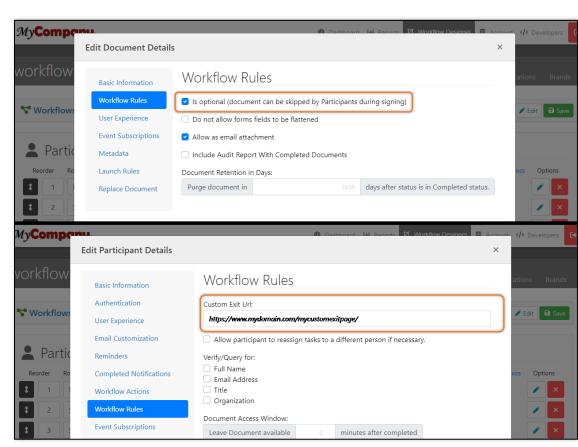
## • [PEP-7331] ~Documents ~Signing ~UI/UX ~WorkflowActions

Fixed issue where if a participant cancelled an optional task, they were not routed to any subsequent task workflow actions. Please see the image below for an example and the settings referenced.

<i>Му</i> Сотрани	1.		🕫 Dashboard	httl Reports 17	Workflow Designer	
Ed	dit Document Details	5			×	
workflow	Basic Information	Workflow Rules				cations Brands
R-R Mandadian	Workflow Rules	🕑 Is optional (document can	be skipped by Participants	during signing)		
<b>Workflows</b>	User Experience	Do not allow forms fields t	to be flattened			Edit Save
	Event Subscriptions	<ul> <li>Allow as email attachment</li> </ul>				
<b>A</b> Partic	Metadata	Include Audit Report With	Completed Documents			
Reorder Ro	Launch Rules	Document Retention in Days:				ocs Options
	Replace Document	Purge document in		days after status	s is in Completed status.	
<b>‡</b> 2						
<b>†</b> 3 :	Save as Preset			Cancel	✓ Update Document	
	Save as Fleser			Cancer		
MyCompany	Inc.		😗 Dashboard	네 Reports 1회	Workflow Designer	unt
R Tasks Editor						✓ Done
V <b>K</b> -	Ja	ne Doe 🗸 🗸	Enable DocForms 🖺 N	lew Patient Form 1	~	→J
R Task	Placement	^	DD		🗲 Task Options	×
<u>I≁</u> Signature		Signer 1 (Signature)	Me [Signature]	orm Ta	sk Type:	
P		6 Deckhourd Ist 0	working Desking Desking		Signature	
c Edit Task Details				La	bel:	
Basic Information	Workflow Act	ions				
User Experience	Action 1		lt 🖸 De	lete Ac	tual field name in final PDF:	
Style	Туре:					10.000
Placement	Web Form			* Pa	rticipant:	
Workflow Actions	Web Form:				Jane Doe	~
Event Subscriptions	Applicant Information				oplication Type:	
d	Add Workflow Action		Show Advan	ced 29	Font-Stamped (Default)	~
					Optional	
			Cancel 🗸 Update	Task	🖋 Edit More Task Prop	erties
IP Address		Think you need minerals, herbs, or vitamins? [ Have any drug allergies? ()f so, what?)	1 Yes    No 1 Yes    No		🗗 Clone Task	
Document ID					× Delete Task	

## • [PEP-7330] ~Documents ~Signing ~UI/UX

Fixed issue where if a participant had a custom exit URL and they cancelled an optional task, they were incorrectly taken to the custom exit URL instead of the next task. Please see the image below for the settings referenced.



## • [PEP-7309] ~UI/UX ~Workflows

AlphaTrust

peline Product

Fixed issue where when attempting to update the Email Sender the setting would revert to the default Sender Option instead of the Sender Option that was selected. Please see the image below for the referenced setting.

MyCompany	, Inc.		🕐 Dashboi	ard 🔟 Reports 12 Work	flow Designer 📱 A	ccount 💔 Developers 🕞
		20	📚 MyCompany, In	с.		
workflow de	esigner / workflow	S	Workflows	Web Forms Docum	ents Content	Notifications Brands
St Workflows > N	MyCompany NDA - С	OPY		🖸 Launch	Test II 🛓 Expo	ort Edit Save
💄 Participa	ant Setup					
Reorder Role	Full Name	Email Add	ress	In-Person	Final Email In	de Docs Options
<b>1</b> Me	Jane Doe	jdoe@	mail.com			
E	dit Workflow Details					×
workflow	Basic Information	Email Sender				cations Brands
B-Base Let	Expirations	Sender Options:				
<b>Workflows</b>	Notifications	Use Default From Name/Em	ail		~	Edit     Save
	User Experience					
2 Partic	Email Sender					
Reorder Ro	Event Subscriptions					ocs Options

NNOVATION UNLEASHED





#### • [PEP-7308] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where bulk launch headers would be incorrect when utilizing the Bulk Launch feature. Please see the image below for the settings referenced.

	Edit Workflow D	Details		×	
rkflo	W Basic Informatio	Launch Rule	es		cations E
	Expirations	Publish this Workf	low as launchable template.		
Norkflo	Notifications		Group to launch this Workflow.		🖋 Edit
	User Experience		Sub Groups in this account to launch this Workflow.		
Par			w launcher to add additional/unique email address		
	Full Event Subscripti		w to be launched publicly with no authentication re		Docs Optic
gner 1	Fi Metadata		orm to use the full page width (default is centered)		
	Launch Display		ion to be edited at the time of launch.		
	Launch Rules	Enable Bulk Launc	_		dd Advano
	Launch Web For				
i Do	CU Save as Preset		Gar	ncel 🗸 Update Workflow	≫ Add Docu
iment Title	Save as Preset		Car		Option
dasl	nboard / workflow		Quick Stats	Weekflow Treeslater Devide	
				Workflow Templates Pending	g Signatures
<b>1</b> 2 w	/orkflow Templates >	Bulk Launch		A Single Laund	ch 📕 Test
N	/lyCompany				
	лусопрану	NDA			
			spreadsheet should be completed. Click the button ate data in each column for your bulk launch.	below to download a sample CS	V
			Lownload Sample CSV		
с	olumn Na	ame	Туре	Required	
A	Sig	gner 1 FullName	Participant	Yes	
В	Sig	gner 1 EmailAddress	Participant	Yes	
C	[fi	eld name here]	Document	No	
			launch data, upload it below, and click the blue 'Sta as soon as the processing has begun.	rt Buik Launch button to start the	e
	Bulk Launch File	Upload C	5//-		
<u> </u>	Buik Edditerritie	opidad e			
			Browse for file	h	
		=	Start Bulk Launch		

#### • [PEP-6603] ~Installer

Added database index to prevent performance issues when querying for transaction token data.

#### • [PEP-3116] ~ControlPanel ~Documents

Fixed issue where when a user attempted to upload an unsupported file type in the Documents section, the Documents uploaded successfully message displayed when it shouldn't have. When unsupported file types are uploaded, an error message will now appear stating that the file type is not supported. Please see the image below for the settings referenced.





My <b>Company</b> . Inc.	🚱 Dashboard 🔟 Reports 🖾 Workflow Designer 🖡 Account 🌾 Developers 🕞
ε	â ∭ S MyCompany, Inc.
workflow designer / documents	Workflows Web Forms Documents Content Notifications Brands
Type to filter Documents	C + Add Document
Document Name	♦ File Size ♦ Last Modified Options
EE Data Sheet.pdf	142.01 КВ 2020-07-01 🗄 🕑 🗙
B REST HTML Test.html	51.56 КВ 2023-11-01 🕑 🗹 🗙
Sample Document.DataFilland2signers.pdf	880.26 KB 2021-01-20 🖽 🗹 🗙

## v5.17.9.1 Release

*Release Date: 11/20/2023* 

#### **Bug Fixes**

#### • [PEP-7440] ~WorkflowActions

Fixed issue where participants were being incorrectly prompted to set a Pin/Password, when defining another participant, when the field was not selected to be requested. The Pin/Password field should only appear during the Define Participant Workflow Action when selected in the Workflow Action settings. Please see the image below for the referenced settings.

My <b>Company</b> , Inc.			🕐 Dashboard 🔟 Reports <b>t红 Workfl</b>	ow Designer 🛛 Account 💔 Developers 🕻 🕇
workflow designer	orkflows	屆   意 MyCompany, Inc.	Workflows Web Forms Docume	nts Content Notifications Brands
Second Se	DA		C Launch	▲ Test 🗮 🛓 Export 🗮 🖍 Edit 🖨 Save
L Participant Setup				
Reorder Role Full Name		Email Address	In-Person	Final Email Include Docs Options
1 Me Jane Doe		jdoe@mail.com		
2 Signer 1 Full Name of the second seco	defined by another Participant	Email Address defined by another P	articipant	
	dit Participant Details			
workflow designer	Basic Information Authentication User Experience Email Customization Reminders	Workflow Actions Action 1 Type: Define Another Participant Participant to Define:	J↑ ● Delete	tent Notifications Brands
Reorder Role Full Name	Completed Notifications	Signer 1 🗸		nal Email Include Docs Options
Image: 1     Me     Jane D       Image: 2     Signer 1     Full Na       Image: 3     Signer 2     Full Na	Workflow Actions Workflow Rules Event Subscriptions Placeholders	Full Name v options     Email Address v options     Phone Number     Title v options     Organization     Authentication     Two-Factor Authentication		
	PDF Fields Launch Rules	Custom Email Message		d Me + Add Advanced
Document Setu	Launch Display Launch Domain Restrictions Launch Labels	Add Workflow Action	Show Advanced	Add Documents     Manage Tasks     Options     Tag Document 3     X





# v5.17.9 Release

## Release Date: 11/3/2023

#### **Bug Fixes**

#### • [PEP-7348] ~ControlPanel ~Documents

Fixed issue where users were unable to use and save changes made in the Task Editor if they were working in a Sub-Group. Please see the image below for more details.

Switch Group	X B Human Resources	ard 🔟 Reports 🛱 Workflow Designer 📱 Account 🌾 Developers 🚺
Select Group or type to filter MyCompany, Inc. > Human Resources	Show Master ID Workflows	Web Forms Documents Content Notifications Brands
😫 Document Setup		∦ <sup>®</sup> Add Documents
Document Title !!Simple Field Test	File Name !!Simple Field Test.pdf	Is Upload Manage Tasks Options
::Simple Field lest		Tag Document
	✓ Add Document(s)	
R Tasks Editor		✓ Done
	Signer 1	Simple Field Test
🕞 Task Placement	^	Task List   Enable Sort
<u>I</u> signature	This is a test	Click to edit a Task. (Double-click for all properties)
<u>×ℓ</u> Initials	This is a test1	5ignature 1
Approval	Signer 2 (Signature)	🛃 Initials
₩ Delivery	failads	
📕 Carbon Copy		

#### • [PEP-7327] ~Documents ~Security

Fixed issue where API calls that were reusing document templates, that also pass in form field data merged into the document, were being incorrectly read from cache.

#### • [PEP-7280] ~Infrastructure ~Installer

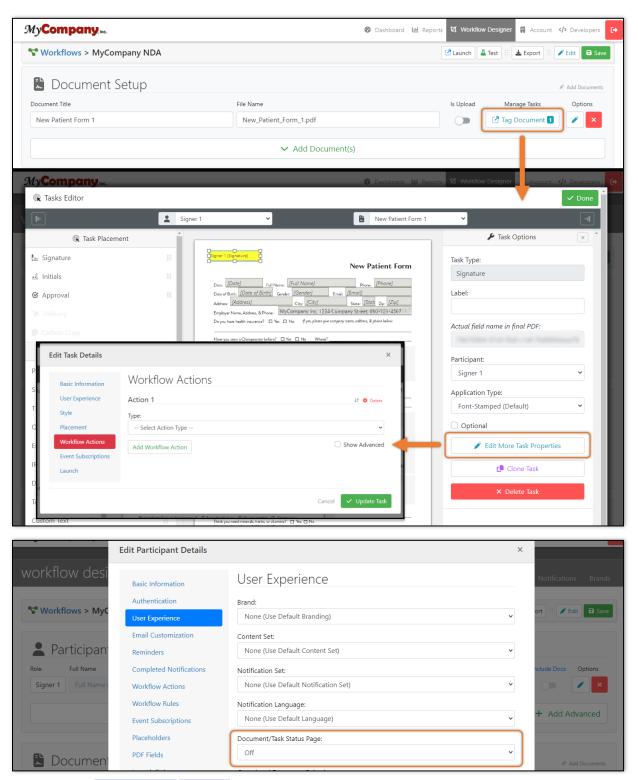
Fixed issue where when installing on a new multi-server with a shared database, the license request file generation fails for one server.

#### • [PEP-7278] ~API/WebServices ~UI/UX ~WorkflowActions ~Workflows

Fixed issue where Task Workflow Actions would not properly redirect the Participant to a custom ULR from the document tasks page under certain conditions. The conditions included that the task on the first document had a Workflow Action, DocForms was not enabled for the participant, and if the Status Page was set to off for the Participant. Please see the images below for the settings referenced.







• [PEP-7277] ~Infrastructure ~Installer



Fixed issue where on the first attempted install, the installer would use an incorrect connection string causing a database connectivity error. Please note that running a 'fresh' install or running the installer again, after ensuring the DUL file contains the correct information, would resolve the issue.

#### • [PEP-7228] ~ControlPanel ~Documents ~Workflows

Fixed issue where when uploading HTML documents into the Documents section, an error would display even though the file was uploaded successfully. Please see the image below for the referenced settings.

М	y <b>Company</b> . Inc.		🐼 Dashboard 🔐 Reports 🖸 Workflow Designer 関 Account  ・/> Developers
		E	Ŝ MyCompany, Inc.
<b>N</b> (	orkflow designer / documents		Workflows Web Forms Documents Content Notifications Brands
	▼ Type to filter Documents		Image: Add Document
	Document Name		♦ File Size ♦ Last Modified Options
210 1710	EE Data Sheet.pdf		142.01 KB 2020-07-01 🗐 🗹 🗙
ð	REST HTML Test.html		51.56 KB 2023-11-01 🕼 🗹 🗙
	Sample Document.DataFilland2signers.pdf		880.26 KB 2021-01-20 🖽 🗹 🗙

#### • [PEP-7199] ~Forms

Fixed issue where users would see an unhelpful error message in a Web Form if the error message was set to null or not set. Please see the image below for an example and the referenced settings.

My <b>Company</b> , Inc.			🕐 Dashboard 🔟 Reports	🛱 Workflow Designer 🖷 A	account > Developers [+
		œ	📚 MyCompany, Inc.		
workflow design	er / web forms		Workflows Web Forms	Documents Content	Notifications Brands
Web Forms > Applicant	t Information		🗳 Test	Device 🔣 🗶 Export 🔢 🚝	Rules Fdit Save
Add Fields		Lintitle	ed Form		
Formatted Fields	~	This is my form. P			
Number		Name:			
Currency Date		Date:	t		
Email Address		Age:		Edit + ×	
Phone Number	Form Editor	Field 3: "Age" [number]	Save and Continue Exit	×	
Social Security Number	Display	Validation			
📚 MyCompany, Inc.	Validation	RegEx Validation: <b>1</b>		(reset)	Back to top ↑
Dashboard Rej		RegEx Error Message: Please enter a number.			
	nds nple	Required		L	
			Cancel		eature Requests / Suggestions nstallation Tests

[PEP-6816] ~Authentication ~UI/UX

NOVATION UNI FASHED



Fixed issue where participants were able to attempt to authenticate multiple times even after failing authentication. The config setting, AuthPINPasswordBadLoginLimit, was being ignored and allowing a user to continue to attempt to authenticate past the set limit.

# v5.17.8.1 Release

## *Release Date: 10/31/2023*

## **Bug Fixes**

#### • [PEP-7375] ~Forms

Fixed issue where DocForms images would not appear during the signing process. Participants would see the fields on screen, but the document itself would not appear as it should. Please see the example images below of what was seen and what should have been seen in DocForms.

ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button.	Continue $\rightarrow$
Fields: 1/3 Required: 0/2	
ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button.	ontinue →
1 New Patient Form	
New Fatient Form	
Date: Full Name: Phone:	
Date:  Full Name:    Date of Birth:  Gender:    Address:  City:      State:      Zip:	
Date:       Full Name:       Phone:         Date of Birth:       Gender:       Email:         Address:       City:       State:       Zip:         Employer Name, Address, & Phone:       MyCompany Inc, 1234 Company Street, 890-123-45	
Date:  Full Name:    Date of Birth:  Gender:    Address:  City:      State:      Zip:      Matter	
Date:    Full Name:    Phone:      Date of Birth:    Gender:    Email:      Address:    City:    State:    Zip:      Address:    City:    State:    Zip:      Employer Name, Address, & Phone:    MyCompany Inc, 1234 Company Street, 890-123-45      Do you have health insurance?    Yes    No    If yes, please give company name, address, & phone below:	
Date:       Full Name:       Phone:         Date of Birth:       Gender:       Email:         Address:       City:       State:       Zip:         Employer Name, Address, & Phone:       MyCompany Inc, 1234 Company Street, 890-123-45	

v5.17.8 Release

*Release Date: 10/23/2023* 

INNOVATION UNLEASHED





#### **Bug Fixes**

#### • [PEP-7325] ~ControlPanel ~Documents ~Workflows

Fixed issue where when utilizing bulk launching, field names containing square brackets, [], were being removed incorrectly. Please see the image below for the settings referenced.

	Edit Workflow Deta	ils		×	
rkflow	Basic Information	Launch Rules		cations	
	Expirations	<ul> <li>Publish this Workflow as I</li> </ul>	aunchable template.		
Norkflows	Notifications	Allow users in this Group		🖉 Edit	6
	User Experience		ups in this account to launch this Workflow.		
Partic	Email Sender		her to add additional/unique email addresses.	at the time of launch.	
Full	Event Subscriptions	Allow this Workflow to be	e launched publicly with no authentication requ	uired. Docs Of	ptic
gner 1 Fu	Metadata	Allow the launch form to	use the full page width (default is centered).	-	
	Launch Display	Allow the Description to b	be edited at the time of launch.		
	Launch Rules	C Enable Bulk Launching		dd Adva	nc
	Launch Web Forms				
i Docu			1	DbA ∜s	
iment Title	Save as Preset		Cance		
	1				
dashb	Oard / workflow tem	plates	Quick Stats	Vorkflow Templates Pending Signature	s
			•		
C Work	flow Templates > Bul	k Launch		🚀 Single Launch 📱 Tes	t
Mv	Company N				
STE			sheet should be completed. Click the button b a in each column for your bulk launch.	elow to download a sample CSV	
		<mark>⊯</mark> Do	ownload Sample CSV		
Column	n Name		Туре	Required	
A	Signer	1 FullName	Participant	Yes	
В	Signer	1 EmailAddress	Participant	Yes	
с	[field n	ame here]	Document	No	
STE		lated the CSV file with your launch o ng. You will receive an email as soon	data, upload it below, and click the blue 'Start n as the processing has begun.	Bulk Launch' button to start the	
🗴 Bu	lk Launch File	Upload CSV:			
			Browse for file		
		<b>⊡</b> ∱ Sta	art Bulk Launch		

• [PEP-7313] ~Documents ~Signatures ~Signing ~UI/UX

Fixed issue where Font-Stamped Signatures would default the font to Jenna Sue regardless of the actual font setting. Please reference the image below for an example and more information.





Tasks Editor			✓ Done
₿←	L Signer	1 🗸 🖌 Enable DocForms 🖹 MyCompany NDA	×
🔍 Task Pla	icement		✗ Task Options
🕨 Signature		Legal Approved:	Task Type:
<u>*</u> Initials		Lorem ipsum dolor sit amet, consectetur	Signature
😵 Approval		adipiscing elit	Label:
😕 Delivery		Vivamus commodo lacinia molis. Aenean ut fellus vestibulum, molestie uma eu, facilisis eros. Duisque alquam, nisi sit amet proteum posuere, appin es defend lacus, a pelentesque lectus velt sit amet dam. Praserel impediel les quis herdent consecteur. Preseita instructura fels at russ dictum bindit. Duisque libero velt, scherbarg men quiga et convelto conseque minis. Duis legal est del sette data del sette del sette alterno del sette d	
📕 Carbon Copy		dam. Pressent imperidet les quis herdreint consecteur. Phiseilles rincruis feis at risus dictum biend. Quisque libero vel, scientisque ner quisque, a convelt sciencequar intella. Dace lisquist set discusse libero vel scientista de la consecteur de la consecteur de la consecteur de la consecteur de Areaen seglis, dobe vela macma primeta, ligala putar nortexia pato, e manema sent dobe velae nate. Ela macma de la consecteur de la consecteur de la consecteur de la consecteur at anal. Ela macma de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur at de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur de la consecteur at de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur de la consecteur at de la consecteur de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur de la consecteur de la consecteur de la consecteur de la consecteur at de la consecteur de la cons	Actual field name in final PDF:
🗉 Add Signatur	re Block Data	nula. Etam scelansque enun di gula lacreel dictum sit annol qui sex. Sod tellus nais, consectear at sodales sed, bloothis sed massa. Wearnus volubet sit annel ante nitrum unitrum linos. Suspendiase porta puns turgis, vitae congue neque euismod a. Sed commodo odio ac folis suscipit feugiat. Suspendisse notemi:	5d71f479-403b-a71a-8a28-fc8208e146a:
Printed Name		pummin integer convellis, felis tempus euismod accumsan, lorem enim vehicula mauris, vitae accumsan eros justo eu augue Vivamus soliidixian lacuas at risil fingila, sit amet bibendum metus vestibulum. Proin pelerteque auctor degium Proin dignismi, nulla vestibulum alliquet phantery, vell est utricins torlor,	Participant: Signer 1
Signature Date		phramespan autor acquain i vion opinisarii, nuai visioudari aluper phaneari, ven eta unices torior, id compue insi lunge avide lacus. Fice commodo risus eda alha lucits, mariamis eusanda esi autori. Donec übero anile, diprissim quis maximus vine, linbus ec augue. Ellam auctor nec sem eu mattis. Quisque nutrum jasto i dinisis efficiur. Pron tal accuman nunc.	Application Type:
Title		Aliquem end voldpal. Ul entre purus, functions nec nuture engl, finitus voltee maaris, Integer tristique, magna quis ullancopara scalarisque, entre avaitabilum toric, regel daphas izuum engue non end. Nanc commodo vehicuta hendreut. Dara in nal ac lectus weldbulum vementin quis quis quis sem. Integer uma odo, toricium trinola libero ultricis, comere ultamorer doir. Petientesque accursson	Font-Stamped (Default)
Organization		malesuada ullamcorper. In aliquam sagittis risus, eget elementum nunc feugiat eu. Sed in maximus nunc, quis vulputate mauris. Suspendisse auctor suscipit ex id blandit.	
Email Address		Present sociersque sem ac importée orane. Sed dignisim enti lacina, sagittis turpis et, mellis dem. Nullem gravida estimol nulle malescala mellis. Fuez ent unis (ementum ut semper n, bibendum quis justo. Proin neque tortor, cursus eget finicidant in, sociersque viteo veit. Cros accu leo, suscipit vel occi di, dicture, conseque timasa, Curathiur posures en justo, di accus es formentum.	Edit More Task Properties
IP Address		vel. In convalits lectus et feits volutpuit, eu soliticitudin erat imperdiet. Integer id conguedolor.	
Document ID		Signature:	Clone Task
Task ID		Printed Name:	× Delete Task
myeempeny.	Edit Task Details		X
R Tasks Editor	Eult lask Details		× Vone
le−	Basic Information	Style	
🔍 Task Pla	User Experience	Font Size:	tions
<u>I</u> ≁ Signature	Style	24 pt	
😢 Initials	Placement	Color:	
😵 Approval	Workflow Actions	Blue 🗸	
👺 Delivery	Event Subscriptions	Font:	
🕒 Carbon Copy	Launch	Arial	• 8a28-fc8208e146a:
🗉 Add Signatu		Sold	
Printed Name		✓ Italic	~
Signature Date		Auto-fit signatures inside signature field dimensions.	
Title			dt) 🗸
Organization		C	Cancel V Update Task

## • [PEP-7303] ~ControlPanel ~Documents ~UI/UX ~Workflows

Fixed issue where when updating a radio button's Option Value, in the sidebar, additional values would be added in an attempt for the system to ensure unique values. Please note that if the value is updated in the Form Field editor modal, which can be access by clicking on the Edit More Field Properties button, the issue would not occur. Please see the image below for the settings referenced and an example.





My <b>Company</b>	😵 Dashboard 🔐 Reports 🖾 Workflow Designer 📮 Account  ・/> Developers 🕞
- ⊡  \$	MyCompany, Inc.
workflow designer/workflows	Workflows Web Forms Documents Content Notifications Brands
Workflows > MyCompany PO: 59387	🔁 Launch 🛛 🖾 Test 💠 🖾 Export 🗮 🖊 Edit 🕞 Save
🕽 Document Setup	ић Add Documents
Document Title File Name	Is Upload Manage Tasks Options
Test test	Tag Document 2
R Tasks Editor       Image: Signer 1	
	consecteur at pendisse porta t. Suspendisse       Field Type:         accumsan eros stibulur. Proin utitrices torfor, mod ex auctor. sem eu mattis.       Field Type:         Radio Button       Participant: (field access)         sem eu mattis.       Signer 1         teger tristique, gue non erat, se sem. Infeger jue accumsan ed in maximus       Field Name:         Actual field name in final PDF:       Actual field name in final PDF:         ut semper in,       RadioButtond566589a_es_:Signer 1

## • [PEP-7283] ~WorkflowActions

Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The condition was if more than one document was included in the transaction and the task on the first document had a Workflow Action. Please see the settings referenced in the image below.





y <b>Company</b> . Inc.			🕐 Dashboard 🔟 Repor	rts 12 Workflow Designer 🖪 Acco	ount <b></b> Developer
Workflows > MyCompany	NDA			🗹 Launch 📕 Test 💠 Export	🗄 🖊 Edit 🕞 S
賭 Document Setu	C				🖈 Add Documer
locument Title		File Name		Is Upload Manage Tasks	Options
New Patient Form 1		New_Patient_Form_1.pdf		🔵 🚺 Tag Documen	it 🚺 🖌 🗡
		✓ Add Document(s)			
y <b>Company</b>			🛷 Dashboard 🔟 Report	rts 12 Workflow Designer	ount <b> </b> Developer
R Tasks Editor					✓ Done
ŀ	Signer 1	Y Enable DocForms	New Patient Form 1	~	→
R Task Placement				🖋 Task Options	×
≤ Signature		r 1 (Signature)	D.C.C.	Task Type:	
2 Initials			v Patient Form	Signature	
Approval	Dute Addr	of Birth: [Date of Birth] Gender: [Gender] Email	[State Zep: [Zip]	Label:	
		loyer Name, Address, & Phone:		Actual field name in final PDF:	
Carbon Copy	Have	you seen a Chiropractor before?  Yes No Where?		79e750b4-37c0-f3af-c1af-7b	8889daea76
Edit Task Details			×	Participant:	
14/-	orkflow Actions			Signer 1	~
Basic Information			t	Application Type:	
User Experience Actio	on 1	11	O Delete	Font-Stamped (Default)	~
Style Type:				Optional	
Placement S Workflow Actions	Select Action Type				
Event Subscriptions	Workflow Action	Show A	dvanced	Edit More Task Prop	perties
Launch				Clone Task	

### • [PEP-7279] ~Authentication ~WorkflowActions

Fixed issue where when defining a participant's phone number for mobile authentication, the phone number entered would not be properly saved. Please see the settings referenced in the images below.

	Edit Participant Details	First Participants' settings	×	
workflow	Basic Information	Workflow Actions		cations Brands
Se Workflows	Authentication	Action 1	↓î O Delete	🖉 Edit 🕞 Save
	User Experience Email Customization	Type: Process Explanation		
💄 Partic	Reminders	Action 2	↓↑ O Delete	
Reorder Rol	Completed Notifications	Туре:		Docs Options
	Workflow Actions	Define Another Participant	~	
¢ 2 5	Event Subscriptions	Participant to Define:		
	Placeholders	Full Name v options		dd Advanced
	PDF Fields	Email Address vertices     Phone Number vertices		
🗜 Docu	Launch Rules Launch Display	Title Organization Authentication		* Add Documents
Document Title	Launch Domain Restrictions	Authentication     Two-Factor Authentication     Custom Email Message		Options
!!Simple Field T	Launch Labels	Customize Page Content		
		Add Workflow Action	Show Advanced	





<i>wy</i> compo	Edit Participant Details	Second Participants' settings	×	di Developers
vorkflow	Basic Information	Authentication		cations Brands
	Authentication	Type:		
Workflows	User Experience	One-Time Passcode	~	Edit Save
-	Email Customization	Send As:		
💄 Partic	Reminders	Sms 🗸	J	
Reorder Rol	Completed Notifications	Passcode length:		Docs Options
‡ 1 S	Workflow Actions	6		
‡ 2 S	Workflow Rules	Integration Name:		
	Event Subscriptions	•		
	Placeholders	Set permanent phone number for this workflow		dd Advanced

## • [PEP-7261] ~Documents ~Transactions

Fixed issue where when attempting to download the Source Document a user would receive an error message and the source document would not download. The Source document should be available to be downloaded. Please see the image below for the settings referced.

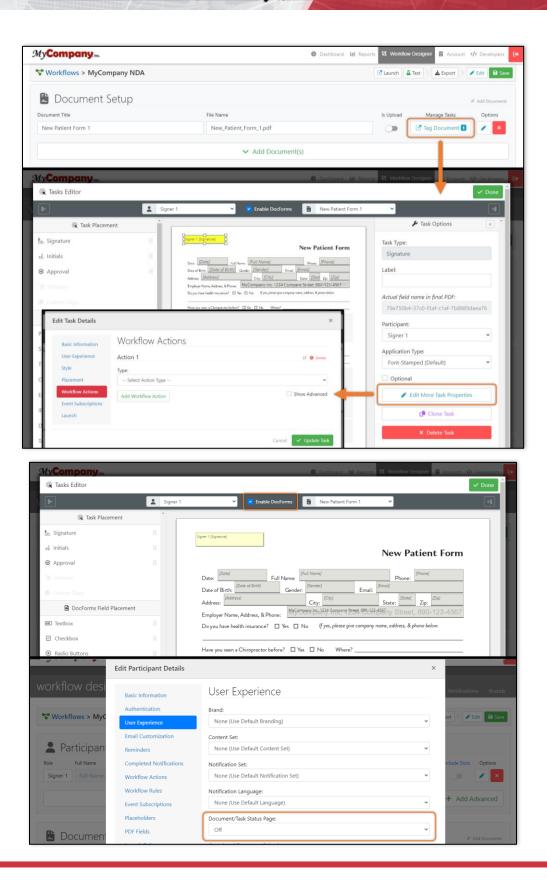
My <b>Company</b> . Inc.		0	Dashboard	e Reports	忆 Workflow Design	er 🖪 Account	
	œ	📚 MyCo	mpany, Inc.				
reports / status		Transaction	Docum	nents Parti	cipants Emails	Audit Report	Event History
Q Search Results > Transaction Detail	s: Documents					Bi	2 🔒 😗
HyCompany NDA							Void Transaction
New Patient Form 1		Docu	iment ID	Title	Statu:	Oownload Source	Document
Document ID:	100007110			New Patient Fo	orm 1 Complete		8 💼 🚨 😫 📼
Transaction ID:	10000000						
Title:	New Patient Form 1						
Туре:	PDF						
Status / ID:	Completed / 4						
Created:	2023-10-23 05:43 PM EDT						
Completed:	2023-10-23 05:43 PM EDT						

## • [PEP-7253] ~Forms ~UI/UX ~WorkflowActions

Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The conditions included DocForms being enabled for a document or participant, and if the Status Page was set to off for the Participant. Please see the images below for the settings referenced.











#### • [PEP-7250] ~WorkflowActions

Fixed issue where Delivery and Carbon Copy tasks were showing with locations on document pages while tagging a document. They now are only accessible from the right Tasks side bar and will not show on the document. Please see the image below for the settings referenced and an example.

R Tasks Editor		✓ Done
k 🕹	Signer 2	▼ Enable DocForms 🖹 New Patient Form 1 👻
Task Placement	Î	Me [Signature]
🏊 Signature		Signer 1 [Signature] [New Patient Form Click to edit a Task. (Double-click for all properties)
<u>∗</u> ℓ Initials		Date: [Date: Latters [Full Name] Prove [Phone] Develor [Date: Chird Gender] Conder] Conder]
😵 Approval		Adom [ddddeec] Cor [dfcho] two [Stel 2p [dfcho] Doyley Man, Alwa, Share Constant Left 7324 Commany Stel 20137 Dayley Man, Mannes ] Do Die (myslew for an anni an Adventier
🥲 Delivery		Urgan Leak Anton magneties: La Ins. La Ins. (Type, provident advance advancement) Have you aren's Orisignated Hadrik? [This] No. [Mone?]
📕 Carbon Copy		Where do you fail the problem? What is your major complete?
DocForms Field Placement		Pause infecte Pyte are breakerstel. 📄 An on the jab highly 📄 An anti-accident. 📄 A home highly
One or more Participants must be Form Fillers in order to add/edit Form Fields in your document.		Date of hippy Invariants Company Accurring's Nareal Additions (Forg) Arry ange presenting Ling and accurring the Company C

#### • [PEP-7144] ~ControlPanel ~Workflows

Fixed issue where when attempting to utilize Bulk Launch for a second time with a Workflow, errors would appear that did not appear when using Bulk Launch the first time. Please see the image below for the settings referenced.

		1		×	
W	Basic Information	Launch Rules			catic
	Expirations	Publish this Workflow as launch	able template.		
ows	Notifications	Allow users in this Group to lau			1
	User Experience		this account to launch this Workflow.		
rtic	Email Sender		add additional/unique email addresses a	t the time of launch.	
Full	Event Subscriptions		hed publicly with no authentication requ		locs
(E)	Metadata		e full page width (default is centered).		
	Launch Display	Allow the Description to be edit			
	Launch Rules	Senable Bulk Launching			A bt
	Launch Web Forms				
icu	Save as Preset		Cancel	Vupdate Workflow	×
	ard / workflow templ				
		N 2010 2020 - Th		Contract of the second	
Norkflo	w Templates > Bulk I	aunch		🖋 Single Launch	h
				A Single Launch	h
МуС	Ompany N[ Below is the legend for	DA how the Bulk Launch File spreadsheet s	hould be completed. Click the button be		
МуС	Ompany N[ Below is the legend for	A			
МуС	Ompany N[ Below is the legend for	DA how the Bulk Launch File spreadsheet s disheet with the appropriate data in ea			
MyC step 1	Ompany N[ Below is the legend for	DA how the Bulk Launch File spreadsheet s disheet with the appropriate data in ea	ch column for your bulk launch.		
МуС	Ompany NI Below is the legend for file and fill out the sprea	DA how the Bulk Launch File spreadsheet s dsheet with the appropriate data in ea dsheet with the appropriate data in ea Downloa	ch column for your bulk launch. Id Sample CSV	low to download a sample CSV	
MyC STEP 1 Column	ompany N[ Below is the legend for file and fill out the spread Name Signer 1 Fi	DA how the Bulk Launch File spreadsheet s dsheet with the appropriate data in ea dsheet with the appropriate data in ea Downloa	ch column for your bulk launch. Id Sample CSV Type	low to download a sample CSV Required	
MyC step 1 Column	ompany N[ Below is the legend for file and fill out the spread Name Signer 1 Fi	DA how the Bulk Launch File spreadsheet s dsheet with the appropriate data in ea Downlou ullName mailAddress	ch column for your bulk launch. Id Sample CSV Type Participant	low to download a sample CSV Required Ves	
MyC step 1 Column A B C	Ompany NE     Below is the legend for     file and fill out the spreat     Signer 1 F     Signer 1 E     Bleld name      Once you have populate	DA how the Bulk Launch File spreadsheet dsheet with the appropriate data in ea & Downlow ulName maiAddress hererj	ch column for your bulk launch. d Sample CSV Participant Participant Document pload it below, and click the blue Start B	Required Yes No	
Column A STEP 2	Ompany NE     Below is the legend for     file and fill out the spreat     Signer 1 F     Signer 1 E     Bleld name      Once you have populate	DA how the Bulk Launch File spreadsheet i disheet with the appropriate data in ea & Downlou ullName matAddress e here! ed the CSV file with your launch data, u	ch column for your bulk launch. d Sample CSV Participant Participant Document pload it below, and click the blue Start B	Required Yes No	
Column A STEP 2	Ompany NE     Below is the legend for     file and fill out the spred     Signer 1 F     Signer 1 E     Bield name      Once you have populate     bulk launch processing.	DA how the Bulk Launch File spreadsheet i disheet with the appropriate data in ea allMame mailAddress e here? ed the CSV file with your launch data, u You will receive an email as soon as th	ch column for your bulk launch. d Sample CSV Participant Participant Document pload it below, and click the blue Start B	Required Yes No	





#### • [PEP-6750] ~Forms ~Signing ~UI/UX

Fixed issue where DocForms were intermittently being skipped on a particular workflow.

#### • [PEP-5183] ~ControlPanel ~WorkflowActions

Fixed issue where a webhook status of "Unknown" was misleading users. Changed Event Subscription status of 3 from "Unknown" to "Active" to convey that the system is currently attempting to update the third-party endpoint.

## v5.17.7.2 Release

#### Release Date: 10/26/2023

#### Important Notes:

The update in version 5.17.7.2 is not included in version 5.17.8 but is included in version 5.17.8.1.

## **Bug Fixes**

#### • [PEP-7375] ~Forms

Fixed issue where DocForms images would not appear during the signing process. Participants would see the fields on screen, but the document itself would not appear as it should. Please see the example images below of what was seen and what should have been seen in DocForms.

ATTENTION: Plea	se make sure you fill out all of the form fields and then click the "Save & Continue" button.	Save & Continue $\rightarrow$
Fields: 1/3 R	equíred: 0/2	
ATTENTION: Pla	ease make sure you fill out all of the form fields and then click the "Save & Continue" button.	ave & Continue →
1	New Patient For	n
	Date:       Full Name:       Phone:         Date of Birth:       Gender:       Email:         Address:       City:       State:       Zip:         Employer Name, Address, & Phone:       MyCompany Inc, 1234 Company Street, 890-123-4         Do you have health insurance?       Yes       No       If yes, please give company name, address, & phone below:	5





# v5.17.7.1 Release

## Release Date: 10/18/2023

#### **Bug Fixes**

#### [PEP-7346] ~Authentication ~Groups ~Integrations ~UI/UX •

Fixed issue where Lexis Nexis KBA integrations would not work for sub-groups if the integration was not set to System-Wide. Please see the image below for the settings referenced.

My <b>Company</b> . Inc.	0	Dashboard 🔟 Reports 🗖	Workflow Designer 🗒 Acc	count ≻ Developers [→</th
	🖽   🍣 MyCo	mpany, Inc.		
account / integrations		Groups User	rs Permission Sets Ir	tegrations Security
Type to filter Integrations			C + Add	d Integration
♦ ID ♦ Integration Name			Activ	e 🗢 Type Options
😽 LexisNexis			~	Lexis Nexis 💉 🗙
k LogRocket			✓	LogRocket 🖉 🗙
MyComponent Add Integration	Ø	Dockhoord W Ronarts 17	Work Decigner Act	rount
ACCOUNT / Integration Integration		Groups if applicable)		ations Security
♦ ID ♦ Integra	Name:			Type Options
😽 8 LexisNex				.exis Nexis 🖉 🗙
-4 30 LogRock Provider:				.ogRocket
		¥		SendGrid 🖉 🔀
Year         Please sel           Knowled         Knowled	ect one ge-Based Authentication			wilio SMS 🖉 🔀
Lexis N	n PreciseID exis uthentication	Cancel	✓ AddIntegration	wilio Verify
Act         32         IwilioTest         Mobile A           Twilio 1         Twilio 2         Twilio 3	Sms			

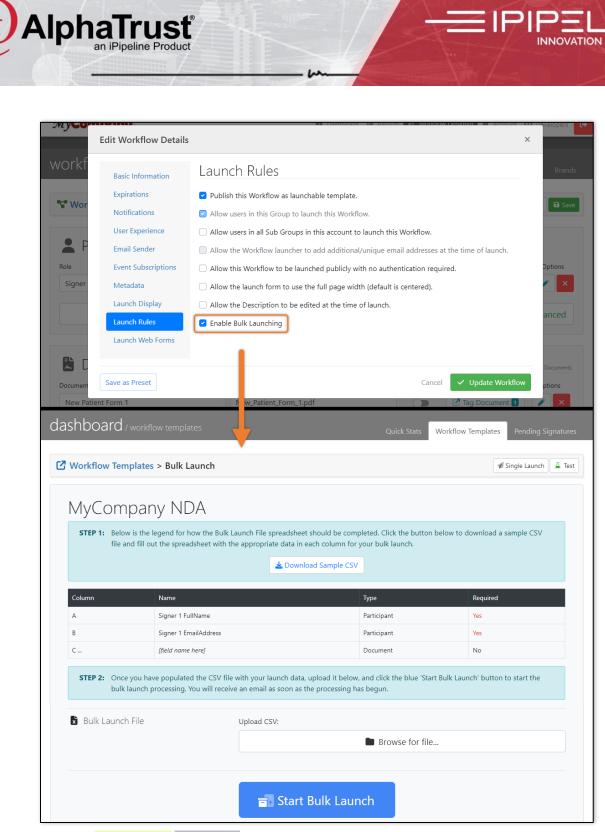
# v5.17.7 Release

## *Release Date: 10/5/2023*

**Bug Fixes** 

#### [PEP-7238] ~ControlPanel ~UI/UX ~Workflows •

Fixed issue where errors were occurring on repeated Bulk-Launches of the same Workflow. Please see the image below for the settings referenced.



#### • [PEP-7202] ~ControlPanel ~Workflows

Fixed issue where Launch Domain Restrictions were preventing Workflows, with Public Launch, from launching. Please see the images below for the settings referenced.





workflow desigr	ner wa	orkflows Web Forms	Documents	Content	Notifications	Brands
Workflows > MyCom	pany NDA		🖸 Launch 📕 🛓 Te	est 💠 Exp	ort 🖉 Edit	Save
Ma <b>Company</b> Edit Workflow Details	Ø	Dachhoard M Reporte	17 Workflow D	esinner 🔳 a	account of the David	×
Basic Information Expirations Notifications User Experience Email Sender Event Subscriptions Metadata Launch Display Launch Rules	<ul> <li>Allow users in all Sub Gr</li> <li>Allow the Workflow laun</li> <li>Allow this Workflow to b</li> <li>Allow the launch form to</li> </ul>	o to launch this Workflow oups in this account to la acher to add additional/u pe launched publicly with	aunch this Workfl Inique email addr I no authenticatic (default is center	resses at the t on required.	ime of launch.	
workflow desigr	ner wa	orkflows Web Forms	Documents	Content	Notifications	Brands

Workflows > MyCompany N	IDA	🕑 Launch 📕 Test 💠 🕹 Export 👯 🖉 Edit 🕞 Save
Participant Setup Role Full Name Vendor Signer Full Name entered	Email Address	In-Person Final Email Include Docs Options  + Add Me + Add advanced  Watkflow Designed  K
Basic Information         Authentication         User Experience         Email Customization         Reminders         Completed Notifications         Workflow Actions         Workflow Rules         Event Subscriptions         Placeholders         PDF Fields         Launch Rules         Launch Display	Launch Domain Rest	trictions Delete





## • [PEP-7111] ~ControlPanel ~Users

Fixed issue where when attempting to bulk upload users, utilizing the Firefox browser, computers with Microsoft Office installed would see an error reporting a bad file type. Please see the image below for the bulk user upload feature referenced.

My <b>Company</b> , Inc.		🕐 Dashboard 🔟 Rep	oorts <b>12</b> , Wa	orkflow Designer	Account	evelopers 🕻
	8	📚 MyCompany, Inc.				
ccount / users		Group	s Users	Permission Sets	Integrations	Security
Users > Bulk Editors						0
🔎 Permissions 🛛 🚆 SSO Logins 🔒 U	Jpload					
To upload multiple users, you can create your are inserting users, select the file fr	0					
column will be added with the error mes	ssage for each user that had issue Insert Users	· · ·		at same CSV file.	adadie CSV file. A	n extra
column will be added with the error me	Insert Users	· · ·	d reupload th	at same CSV file.	adadie CSV Tile, A	n extra
column will be added with the error me	Insert Users	es. You can then fix the issues and	d reupload th	at same CSV file.	iadadie CSV Tile, A	n extra

#### • [PEP-6642] ~ContentSets ~ControlPanel ~UI/UX

Fixed issue where a user could edit a Content Set and freely switch between sections before saving any changes that were made. If a user switched sections while making changes, the editor would only save the last section that was edited. The Content Template editor will now prevent switching sections if changes are made, and an option was added to keep the editor open so a user can make multiple changes before leaving the editor view. Please see the image below for additional details.

MyComp	TMLI, 🔊 Dachboard Mil Penorte 🛛 🕅 Workligw Designer 🗮 Account	
	Content Editor ×	
workflov	Section:	tions Brands
	Success > Download Enabled > Signed Message	
Content >	Content: Edit. Inser. Format Content Tompleto. Once the changes are made to a	🔛 🚅 Rename
Supported Lan	Edit       Insert       Format       Content Template. Once the changes are saved, by clicking on the Update Content button, the section drop-down will be re-enabled.         B       I       E       IIII       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	ied Options
English	A	-26 🛅 🖉 🔀
English	((Email) essageResult))	-07
	Su <mark>c</mark> cess!	
Select the che Types from	Thank ou. You have successfully completed your document(s).	
51	Please download a copy of your document(s) to your computer for safekeeping. Once you have downloaded your docur ent(s) you may close this browser window.	.07
	{[Dow_lloadWindowLimitMessaqe]} {[DocumentsTable]}	-07
	test update	-07
		-07
	If checked, the Content Editor will stay on screen after clicking on the Update Content button.       Cancel V Update Content	-25
	DDE Enron Fill	





#### • [PEP-5873] ~Authentication ~SMS ~Workflows

Fixed issue where Workflows would launch successfully even when invalid phone numbers were entered for mobile (One-Time Passcode) authentication. Added regular expression validation for phone number form fields in the Control Panel and Signing UI. The validation will allow the following: numbers, (), +, -, ., and spaces. Please see the images below for the referenced setting and an example.

Edit Participant Details	×
Basic Information	Authentication
Authentication	Type:
User Experience	One-Time Passcode 🗸
Email Customization	Send As:
Reminders	Sms 🗸
Completed Notifications	Passcode length:
Workflow Actions	
Workflow Rules	Integration Name:
Event Subscriptions	PadiaCasis ♥
Placeholders	Set permanent phone number for this workflow
PDF Fields	Number of phone number characters to leave unmasked:
Launch Rules	
Launch Display	Save the raw response?
Launch Domain Restrictions	No 🗸
Launch Labels	Use two-factor authentication.
Save as Preset	Cancel 🗸 Update Participant
Company	😵 Dashboard 🔛 Reports 🛱 Workflow Designer 📮 Account 🌾 Develop
hoard	

My <b>Company</b> , Inc.	🥙 Dashboard 🔟 Reports 🛛 Workflow Designer 🖷 Account 🌾 Developers 🕞
dashboard	Quick Stats Workflow Templates Pending Signatures
C Workflow Templates > Test Launch	Bulk Launch
Sample Workflow	
Signer 1	Full Name: Jane Doe Email Address jdoe@mail.com
Phone Number validation includes: numbers, (), +, -, ., and spaces	Phone Number: +1 (234) 567-8910.





## v5.17.6.2 Release

## Release Date: 2/12/2024

#### **Important Notes:**

The update in version 5.17.6.2 is not included in versions 5.17.7, 5.17.7.1, 5.17.7.2, 5.17.8, 5.17.8.1, 5.17.9, 5.17.9.1, 5.17.10, 5.17.11, or 5.17.12.

#### **Bug Fixes**

#### • [PEP-7710] ~Infrastructure

Fixed issue where IIS Worker Processes were getting hung during signing. This was seen as a spinner on the Sign UI for users.

#### v5.17.6.1 Release

## *Release Date: 10/26/2023*

#### Important Notes:

The update in version 5.17.6.1 is not included in versions 5.17.7, 5.17.7.1, or 5.17.8, but is included in version 5.17.8.1.

#### **Bug Fixes**

#### • [PEP-7375] ~Forms

Fixed issue where DocForms images would not appear during the signing process. Participants would see the fields on screen, but the document itself would not appear as it should. Please see the example images below of what was seen and what should have been seen in DocForms.





	ase make sure you fill out all of the form fields and then click the "Save & Continue" button.
INTION: P	equired: 0/2 lease make sure you fill out all of the form fields and then click the "Save & Continue" button.
INTION: P	lease make sure you fill out all of the form fields and then click the "Save & Continue" button.

# v5.17.6 Release

# *Release Date: 9/21/2023*

**Bug Fixes** 

## • [PEP-7230] ~ControlPanel ~Integrations ~Users

Fixed issue where if an SSO option was deleted from a user's profile, other SSO options would not load on a user's detail page. Please see the example image below for the SSO settings referenced.



					🕐 Dashboard	🔟 Reports	12 Workflow E	)esigner	🛱 Account		iers 🕞
			Ð	\$							
account / users						Groups	Users Perm	ission Se	ts Integra	ations Sec	curity
Lusers > Bob Jor	nes	-					🖋 Edit	User 🔊	Reset Passwo	rd 🛛 🛛 Delete	User
Username:	still dense displace al con-	P	Permissions 👔 🖪 SSO Login	s 🔰 🖾 Emails 167	1						
Full Name:	Bob Jones		<b>7</b> Type to filter SSO Logins				ø		Bulk Editor	+ Add S	50
Email Address:	schulterus displation on		• Type to fater 350 Logais						Buik Eultor	T Add 3.	30
Title:	programmer		Integration Name		≑ Use	ername				0	Options
Organization:	AT	R.	UAT Okta		-	ana da seconda d					<ul> <li>×</li> </ul>
Group ID:	appairus.	-	UAT Okta		1.00	-					
Group:	Appellus .										

#### • [PEP-7229] ~API/WebServices

Fixed issue where an HTTP status code of 500 was occasionally returned when creating transactions under load.

#### • [PEP-7213] ~ControlPanel ~Workflows

Fixed issue where under certain authentication pairings the Edit Participant Details editor would not open after being set. Please see the image below for an example and the settings referenced.

	Edit Partic	ipant Details					×	
workf	Basic Inf	ormation	Authe	ntication				Brands
	Authenti	ication	Type:					
ST Wor	User Exp	erience	One-time	e PIN/Password			~	B Save
	Email Cu	stomization	Set perr	nanent password for this workflow				
P P	Reminde	ers	🗸 Use two	-factor authentication.				
Reorde	Complet	ed Notifications	Second-F	actor Authentication				Options
ŧ	Workflow	w Actions	Type:					<ul> <li>×</li> </ul>
ŧ	Workflow	w Rules		e Passcode			~	
	Event Su	bscriptions	Send As:					
	Placehol	ders	Email	~				anced
	PDF Field	ds	Passcode le	ength:				
	Launch F	Rules	4					
	Launch (	Dieplay						Documents
workflo	w desi	igner / workflo		Workflows Web Orms				
S Workflo	ows > My	Company NDA -	COPY	•	🖸 Launch	🗕 Test 🗄 🛓	Export 🗄 🖉 Edit	B Save
			<u> </u>					
💄 Par	ticipan	t Setup		the Authentication settings for the e Edit Participant Details options t				
Reorder	Role	Full Name		Email Address	In-Person	Final Email	Include Docs	Options
<b>‡</b> 1	Me	Jane Doe		jdoe@mail.com				/ ×
<b>‡</b> 2	Signer 1	Full Name define	d by another	Email Address defined by another				/ ×
							C	

• [PEP-7211] ~ControlPanel ~Documents ~UI/UX ~Workflows

Fixed issue where users were not able to edit the properties of a delivery or carbon copy task. Please see the image below for an example and the settings referenced.





🔍 Tasks Editor		✓ Done
k	Signer 2	▼ Enable DocForms 🖺 New Patient Form 1 👻
🕞 Task Placement	*	
<u>I</u> ≁ Signature		Me (Signature) Uarre Doei
<u>*l</u> Initials		New Patient Form
😵 Approval		Date: [Date] Full Name: [Full Name] Phone: [Phone]
🎾 Delivery		Date of Birth:         [Date of Birth:]         [Gender:         [Gender]         Email:           All:         [Address]         Civ.         [City]         Sur.         [State]         T.         [Zip]
🕒 Carbon Copy		Address:         [Address]         City:         [City]         State:         [State]         Z(p)           Employer Name, Address, & Phone:         MyGomeany.lncy.1234_Company.Street, 890-123-4567         A500-123-4567
DocForres Field Place	ment	Do you have health insurance? 🗌 Yes 🔲 No 🛛 If yes, please give company name, address, & phone below:
R Tasks Editor		✓ Done
4	Signer 2	✓ Enable DocForms New Patient Form 1 ✓
Egree 1 (Signature) Date: Date of Birth: Date of Birth: Address: [Address] Employer Name, Address, & Do you have health insurance Have you seen a Chiropracto	e? □ Yes □ No <i>If yes</i> ,	New Patient Form
Where do you feel the pr	roblem? What is your majo	August v

#### • [PEP-7177] ~ EventSubscriptions

Fixed issue where the Reassigned Participant ID & Name are missing from SMS and Email Event Notifications. Please see the image below for the referenced settings.





	Email Template Examp				
Subject:	Third Party: Participant Status	s Change	oti	Message:	SMS Template Ex Third Party: Partie
Participant Reassigned Tasks				Participant Reassigned	Status Chang
Body:			Ex	CT ORIGINAL PARTICIPANT	
Edit Insert Format Table Tools In	isert e-Sign Placeholders			ID: {{PARTICIPANT_ID}} Name: {{PARTICIPANT_FULLN	VAME}
B I ⊨ ∺ <u>A</u> ∨ <i>≧</i> ∨ <i>S</i>	57 (> 57		ang	REASSIGNED PARTICIPANT	
((ACCOUNT_LOGO)) Participant Status			<u>^</u>	ID: {{REASSIGNED_PARTICIPANT ID: {{REASSIGNED_PARTICIPANT Name: {{REASSIGNED_PARTIC	
•	ectronic document transaction that you initiated	(or was initiated on your behalf) has	s changed.		
Original Participant Information:  Participant ID: ((PARTICIPANT_ID)) Participant Name: ((PARTICIPANT_F Reassigned Participant Information:	:ULLNAME))		e ail		Indata Natification Toma
Participant ID: {{PARTICIPANT_ID}}     Participant Name: {{PARTICIPANT_F	TICIPANT_ID}		POWERED BY TINY &		
Participant ID: ((PARTICIPANT_ID))     Participant Name: ((PARTICIPANT_F Reassigned Participant Information:     Participant ID: ((REASSIGNED_PAR Participant Name: ((REASSIGNED_F))	ITICIPANT_JD)) PARTICIPANT_FULLNAME))	Cancel 🗸 Up	POWERED BY TINY	Participant Rea: ORIGINAL PA	ssigned
Participant ID: ([PARTICIPANT_DD])     Participant Name: ([PARTICIPANT_F Reassigned Participant Information:     Participant Information: Participant Information:     Participant Name: ([REASSIGNED_F Participant Name: ([REASSIGNED_F])	(TICIPANT_ID)) partICIPANT_FULLNAME})  nformation: 1000226445			Participant Reas	ssigned RTICIPANT 104
Participant ID: ((PARTICIPANT_DD))     Participant Name: ((PARTICIPANT_F Reassigned Participant Information: Participant ID: ((REASSIGNED_PAR Participant Name: ((REASSIGNED_F) DV     Participant ID:     Participant ID:	ITICIPANT_IDI) PARTICIPANT_FULLNAME)) nformation: 1000226445 me:		odate Notification Template	Participant Reas ORIGINAL PA ID: 10002264 Name:	ssigned RTICIPANT 104
Participant ID: ((PARTICIPANT_ID))     Participant Name: ((PARTICIPANT_F Reassigned Participant Information:     Participant ID: ((REASSIGNED_PAR Participant Name: ((REASSIGNED_F)))      Participant Name: (REASSIGNED_F)      Participant ID:     Participant Name)	tTICIPANT_ID)) participant_FULLNAME)) information: 1000226445 me: ant Information: t Case	iigned	odate Notification Template	Participant Reas ORIGINAL PA ID: 10002264 Name:	RTICIPANT 404

#### • [PEP-7170] ~API/WebServices ~Documents ~Forms

Fixed issue where DocForm checkboxes would lose their checked value in the document if its ExportValue or Checked Value was not "Yes", "Off" or Null. Checkboxes will now be able to support custom values rather than just "Yes", "On", "Off" or Null. Please see the image below for the referenced settings.

R Tasks Editor		✓ Done
Signer 1	<ul> <li>Enable DocForms</li> <li>MyCompany NDA1</li> </ul>	~ <del>(</del> 1
DocForms Field Place		
AB Textbox	II Yes	
☑ Checkbox	Lorem ipsum dolor sit amet, consectetur	
• Radio Buttons	adipiscing elit	
Edit Form Field Details	+	×
Basic Information Style Placement	Basic Information Field Type: Checkbox Participant: Signer 1  (field access) Field Name: Actual PDF Field Name: Checked Value: Yes	





# v5.17.5 Release

*Release Date: 9/5/2023* 

#### **Bug Fixes**

• [PEP-7192] ~API/WebServices ~Documents ~UI/UX

Fixed issue where PDF documents were not being merged properly.

## • [PEP-7186] ~Forms

Fixed issue where copied DocForm elements would not be positioned correctly. Please see the example image below for additional details.

R Tasks Editor		✓ Done
test name	✓ ✓ Enable DocForms	orm 🗸
		✗ Multi-Select Options
		Distribute: $\Leftrightarrow  \Leftrightarrow$
Select One: 🗔 New Account 🗔 Update Account Account Type (Sel	Select One: 😡 Direct 🛄 Brokerage 🔜 Advisory	Clone Selected Items
Individual Joint WROS (default) Joint TIC Joint Community Prop TOD Joint Community Prop TOD	A Trust Coverdell / ESA A Extate Corporation 529 UTMA / UGMA Coverdell / ESA Corporation Non-Profit Organization Coverdell / ESA Coverdell / ESA Coverd	× Delete Selected Items
test name	🗸 🔽 Enable DocForms  🖺 Customer Account F	orm 🗸
		✗ Multi-Select Options x ▲
Cloned Radio Buttons should appear next to the existing Radio Buttons.	Select One: 🔲 Direct 📑 Brokerage 💭 Advisory	Distribute: $\qquad \qquad \qquad$
Account Type (Sel		Clone Selected Items
Lindividual Joint WROS (default) Joint TIC Joint Community Prop TOD	A Trust Coverdell / ESA A Evan Corporation 2 529 Composition Composition 2 529 Composition Composition 2 529 Composition Composition 2 529 Composition C	× Delete Selected Items
Account Regist	ration	

• [PEP-7180] ~API/WebServices ~Metadata ~Transactions ~Workflows

Fixed issue where Participant's Titles were not being updated during the Signer Information step in a workflow. Please see the image below for the referenced settings and example Signer Information Page.



Basic Information       Custom Exit U!         Authentication       Custom Exit U!         User Experience       Inter//www.mydomain.com/mycustomeeitpoge/         Email Customization       Inter//www.mydomain.com/mycustomeeitpoge/         Completed Notifications       Verify/Query for         Workflow Rules       Interesting         Portel       Organization         Notifications       Verify/Query for         Portel       Interesting         Portel       Organization         Portel       Organization         Portel       Organization         Portel       Intrusts after completed         Document Access Unidow:       Intrusts after completed         Document Access Limit:       Intrust after completed         Document Access Limit:       Intrust after completed    Procemperty.tec. Procemperty.tec.	Edit Participant Details		×
Custom       Custom         User Experience       Introduction         Image: Customization       Allow participant to reassign tasks to a different person if necessary.         Reminders       Verify/Query for:         Completed Notifications       Image: Customization         Workflow Rules       Organization         Placeholders       Document Access Window:         Placeholders       Document Access Limit:         POF Fields       Allow articipant to access 5 imes after completed         Document Access Limit:       Allow articipant to access 5 imes after completed         Power Buder       Signee Information requested below exactly as you would normally write it when signing a paper document finduding appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         True:       GM         Organization:       MyCompany, Inc.         True:       GM         Organization:       MyCompany, Inc.         Continue       Continue	Basic Information	Workflow Rules	
Construction       Index participant to reassign tasks to a different person if necessary.         Reminders       Index participant to reassign tasks to a different person if necessary.         Workflow Actions       Index participant to reassign tasks to a different person if necessary.         Workflow Rules       Organization         Placeholders       Organization         Porter Fields       Allow articipant to access 5 imite         Allow articipant to access 5 immes after completed         Docum tt Access Limit:       Allow articipant to access 5 immes after completed         Signer Information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         Title       GM         Organization:       MyCompany, Inc.         Continue       Continue	Authentication	Custom Exit Url:	
Reminders       Verify/Query for:         Workflow Actions       Imail Address         Workflow Rules       Imail Address         Placeholders       Document Access Unide:         Placeholders       Document Access Limit:         Allow articipant to access 5       times after completed         Stigner Information       Equation of the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         Title       GM         Organization:       MyCompany. Inc.	User Experience		
Reminders       Verify/Query for:         Completed Notifications       Full Name         Workflow Actions       Imail Address         Vorkflow Rules       Organization         Placeholders       Document Access Window:         Placeholders       Document Access Limit:         PDF Fields       Image Rules         MyCompany. Inc.       Signed upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         Title       GM         Organization       MyCompany. Inc.         Continue       Continue	Email Customization	Allow participant to reassign tasks to a different person if necessary.	
Completed Notifications Workflow Rules Event Subscriptions Placeholders PDF Fields Twue Brulee Brune Brule Brune Brule Brune Brule Document Access Window: Leave Document Access Window: Leave Document Access Limit: Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Brune Brule Brune Brule Brune Brule Brune Brule Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limit: Allow articipant to access 5 times after completed Document Access Limi	Reminders		
Workflow Actions       Itile         Workflow Rules       Organization         Event Subscriptions       Document Access Window:         Placeholders       Docum it Access Limit:         PDF Fields       Allow articipant to access 5 times after completed         MyCompany.inc.       Image: State of the state	Completed Notifications	Full Name	
Workflow Rules       Document Access Window:         Event Subscriptions       iminutes after completed         Placeholders       Document Access Limit:         PDF Fields       Allow articipant to access 5         MyCCompany.tuc.    Plase enter or confirm the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.          Title:       GM         Organization:       MyCompany, Inc.	Workflow Actions		
Event Subscriptions       Leave Document available       0       minutes after completed         Placeholders       Document Access Limit:       Allow participant to access       5       times after completed         Signer Information       request Pulse       Image: Signer Confirm the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         Title:       GM         Organization:       MyCompany, Inc.         Continue       Continue	Workflow Rules	Organization	
Placeholders PDF Fields Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to access 5 times after completed Docum at Access Limit: Allow articipant to	Event Subscriptions		
PDF Fields       Allow articipant to access       5       times after completed         MyCompany.inc.         Signer Information         Please enter or confirm the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         Title:       GM         Organization:       MyCompany, Inc.         Continue       Continue		Leave Document available 0 minutes after completed	
Allow articipant to access 5 times after completed  MyCompany, Inc.  Signer Information Please enter or confirm the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.  Title: GM Organization: MyCompany, Inc.  Continue			
Signer Information         Please enter or confirm the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.         Title:       GM         Organization:       MyCompany, Inc.         Continue		Allow articipant to access 5 times after completed	
Organization: MyCompany, Inc. Continue	Signer Inform Please enter or confirm the inform (including appropriate upper and l	mation ation requested below exactly as you would normally write it when signing a paper document	
Continue	Title:	GM	
	Organization:	MyCompany, Inc.	
		Continue	

## • [PEP-7164] ~Integrations ~Logging

Fixed issue where after failing to validate the client's SSO token, the software is returning null and providing no further detail, making it difficult to troubleshoot. Added additional logging and error messaging to the SSO login. Please see the image below for the referenced settings.

INNOVATION UNLEASHED





MyCompany, Inc.	🤣 Dashboard 🔟 Reports 🔯 Workflow Designer 🛱 Account
	⊡   📚 MyCompany, Inc.
account / integrations	Groups Users Permission Sets Integrations Security
Type to filter Integrations	Active Type Options
*	
<i>Му</i> Сотрани. Add Integration	Dashboard M Banorte II Workflow Design     Account (A Developers      X
	Integration
	<ul> <li>System-Wide</li> <li>Account-Wide (shared to all other Groups and Sub-Groups if applicable)</li> </ul>
<ul> <li>♦ ID</li> <li>➡ 8</li> </ul>	Integration Name: Options
-* 30	Provider:
-* 38	Please select one
* 11 * 13	Please select one         SSO Authentication         Windows Active Directory Federated Services (ADFS)         Microsoft Azure AD
32 <u>TwilioTest</u>	Okta Visourio SMS 🖉 🗙

## • [PEP-7138] ~Workflows

Fixed issue where when attempting to saving large Workflows the exit warning message "Are you sure you want to leave without saving?" would appear. If you then clicked on the Cancel option, document save errors would display.

#### • [PEP-7121] ~ContentSets ~ControlPanel ~UI/UX

Fixed issue where Content Page Templates were failing to retrieve successfully under certain conditions such as when attempting to overwrite in a different language. See the example image below for more detail.





My <b>Company</b> . Inc.		🕜 Dashboard 🔟 Reports 🚺 Workflow Designer	Account	evelopers
	23	📚 MyCompany, Inc.		
workflow designer / content		Workflows Web Forms Documents Content	Notifications	Brands
Content > MyCompanyInc			🛓 Export 🧮	🕑 Rename
Supported Languages + Add Language		Content Page Template	Last Modified	Options
		Access Denied	2022-11-28	b 🖊 🗙
Spanish 🗸 🗙		Authentication (Common)		
		Authentication (Experian)		
Overwrite From Another Content Template Set		Authentication (LexisNexis)		
Select the Template Set and Language you		Authentication (OTP)		
would like to use to overwrite the selected		Authentication (PIN/Password)		
items.		Authentication (Registered User)		
Template Set:		Cancel/Suspend		
Master Set (READ-ONLY)		Confirm Intent		
Language:		Define Participant	2023-08-29	6 🖊 🗙
Spanish 🗸		Document Tasks		
📩 Overwrite Selected Items		Exit		
Solution of the selected items		PDF Form Fill		

## v5.17.4 Release

# *Release Date: 8/25/2023*

## **Bug Fixes**

## • [PEP-7166] ~Signing ~WorkflowActions

Fixed issue where required Custom Task Workflow Actions would cause Workflows to get stuck at the Custom Workflow Action. Please see the image below for the Custom Workflow Actions settings referenced.

Edit Task Details		×
Basic Information	Workflow Actions	
User Experience	Action 1	🕽 🖸 Delete
Style	Туре:	
Placement	Custom	~
Workflow Actions	Label:	
Event Subscriptions		
Launch	URL:	
	Data:	
	Add Workflow Action	Show Advanced
		Cancel 🗸 Update Task





## • [PEP-7141] ~ContentSets ~Notifications ~UI/UX

Fixed issue where when a user pasted images from their clipboard into template editors, it wouldn't save the images properly. This affected editors such as Content Editor and Email Template Editor. See the example image below for more detail.

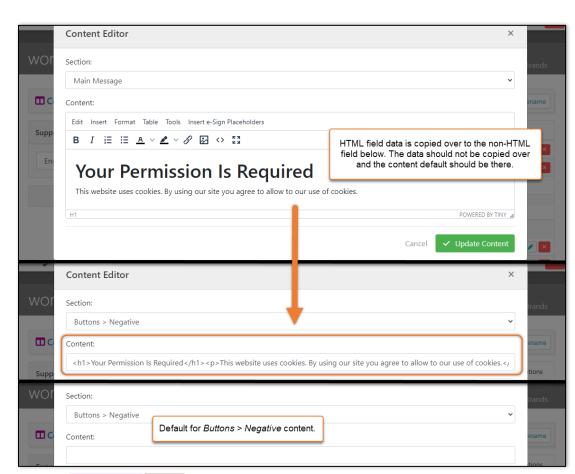
Notification Template Editor		×
Subject:		
Document Transaction Completed for {{PARTICIPANT_FULLNAME}}		
Body:		
Edit Insert Format Table Tools Insert e-Sign Placeholders		
$B  I  \coloneqq  \underrightarrow{\mathbf{A}}  \lor  \checkmark  \checkmark  \mathscr{P}  \underrightarrow{\mathbf{D}}   \diamond   \overbrace{\mathtt{s}}^{\mathtt{s}}$		
({ACCOUNT_LOGO}) <b>Document Transaction Completed</b>	The pasted image should be saved when clicking on the <i>Update</i> <i>Notification Template</i> button, but it does not save correctly.	
NOTE: The final document(s) may not be attached due to security reasons but the transaction has co Document Information: {{DOCUMENT LIST BULLETED}}	òmpietea successiuny.	
([EMAIL_FOOTER])		
DIV	POWERED BY TINY	h
	Cancel 🗸 Update Notification Template	e

## • [PEP-7123] ~Installer ~Signing

Fixed issue where a security fix caused the denial of X-Frame-Options from the web.config. Removed the DENY setting in the Sign application to allow iframing.

#### • [PEP-7118] ~ContentSets ~ControlPanel

Fixed issue where Content Editor values would be copied from one section to another, when switching from a HTML field to a non-HTML field. Please see the image below for more details.



#### • [PEP-7106] ~Integrations ~UI/UX

Alpha

**Frust** 

Fixed issue where the Integrations tab would periodically fail to load. Please see the image below for the Integrations tab referenced.

М	yCo	mpany. Inc.		🕐 Dashboard	ା Reports	<b>12</b> . Wa	orkflow Designer	🖪 Acco	unt > Deve	elopers
			ED	🍣 MyComp	any, Inc.					
ac	COI	unt / integrations		(	Groups	Users	Permission Se	ets Inte	egrations	Security
	<b>T</b>						Q	+ Add	Integration	0
	¢ ID	Integration Name						Active     Act	Type	Options
-¥	8	<u>LexisNexis</u>						~	Lexis Nexis	<ul> <li>×</li> </ul>
-¥	30	LogRocket						~	LogRocket	<ul> <li>×</li> </ul>
	11	TwilioSmsCreds						~	Twilio SMS	💉 🗙
-¥										

#### • [PEP-7065] ~ EventSubscriptions

Fixed issue where Event Subscription notifications were not being sent for Participant Reassigned event. Also fixed issue where Skipped Document event notifications were being sent out incorrectly as Status Changed Event notifications. Please see the image below for the referenced settings.

NOVATION UNLEASHED



Edit Participant Details	;	×
Basic Information	Event Subscriptions	
Authentication	Subscription 1	1
User Experience	Туре:	
Email Customization	Participant Reassigned 🗸	
Reminders	• Webhook C Email C SMS	
Completed Notifications	URL:	
Workflow Actions		
Workflow Rules	Data:	
Event Subscriptions	Subscription Data	
Edit Workflow Details		×
Basic Information	Event Subscriptions	
Expirations	Subscription 1 O Delete	
Notifications	Type:	
User Experience	Skipped Document Event	
Email Sender	• Webhook C Email C SMS	
Event Subscriptions	URL:	
Metadata		
Launch Display	Data:	
Launch Rules		
Launch Web Forms	Add Event Subscription Show Advanced	Ŀ
Save as Preset	Cancel 🗸 Update Workflo	w

#### • [PEP-6972] ~Authentication ~ControlPanel ~UI/UX ~Workflows

Fixed issue where when upgrading software versions, older Workflows utilizing One-Time Passcode (previously known as Mobile) would see the participant validation *(Send As)* not properly set in the UI. Please see the image below for additional details.

INNOVATION UNLEASHED



Edit Participant Details	×
Basic Information	Authentication
Authentication	Туре:
User Experience	One-Time Passcode 🗸
Email Customization	Send As:
Reminders	Select a Send Type
Completed Notifications	Select a Send Type Email
Workflow Actions	Sms Email and Sms
Workflow Rules	Use two-factor authentication.
Event Subscriptions	
Placeholders	
PDF Fields	
Launch Rules	
Launch Display	
Launch Domain Restrictions	
Launch Labels	
Save as Preset	Cancel 🗸 Update Participant

## • [PEP-6524] ~Forms ~Documents ~Workflows

Fixed issue where duplicate fields with the same name would incorrectly have their values duplicate in the fields when utilizing the Bulk Launch feature. Please see the image below for an example.

NT	-	TEST	DOCUME	NT -		TEST. Rep Number	EP1234 REP1234
] Update	Field	name, <i>Rep i</i> ds should ha	the same field Number_es. ve had REP1234 1234,REP1234			RR# 34,REP1 OSJ Manage	Representative Sig
ed IRA er IRA RA Conversion	ĪRA	Home Off	ice Principal Name	(state of gr	,	Home Office	e Signature

• [PEP-6312] ~ControlPanel ~Documents ~UI/UX ~Workflows

Fixed issue where a Document Title and File Name was not required in the Workflow Designer even though it is required in the Document Details. A Document Title and File Name will now be required in the Workflow Designer. Please see the image below for more details.

INNOVATION UNLEASHED





My <b>Company</b>	🛷 Dashboard 🔟 Reports 🖬 Workflow Designer 🗐 Account 🌗 Developers 🕻
	I I S MyCompany, Inc.
workflow des	GUEL / workflows Workflows Web Forms Documents Content Notifications Brands
St Workflows > My	ompany PO
🗜 Documen	* Setup * Add Documents
Document Title	File Name     Is Upload     Manage Tasks     Options       Image: Tag Document 2     Image Tasks     Image Tasks     Image Tasks     Image Tasks
	✓ Add Document(s)
My <b>Company</b> Edit Docume	nt Details
WOR	ation Basic Information Brands
Workflow R User Experi	a la Save
Event Subs Metadata	riptions File Name: Required
Rec Launch Rul	s File PDF File Name:
t Replace Do	
Save as Prese	Cancel 🗸 Update Document

## v5.17.3 Release

# *Release Date: 8/10/2023*

**Bug Fixes** 

## • [PEP-7096] ~API/WebServices ~Logging

Fixed issue where a misleading InvalidOperationException was thrown when async operations didn't finish correctly.

#### • [PEP-7084] ~Groups ~UI/UX

Fixed issue where validation for Document Integrity would not allow for any value to be set. The setting would only accept a blank value. Please see the image below for the referenced setting.





Edit Group		×
Basic Information	Document Integrity	
Document Integrity	Document Retention:	
Security	Purge at specified # of days after 'Completed'	~
Privacy Policy User Experience	Retention Days Before Purge: min: 0 / max: forever (blank)	
Logo Multi-Factor Authentication Email Services	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:	
	Embedded PDF digital signatures have not been configured for this system.	
	Cancel 🗸 Update G	iroup

#### • [PEP-7067] ~Reports ~UI/UX

Fixed issue where the label text may cause confusion in the Transaction Details Participants tab. Changed Participants tab text from `in this document` to `for this participant`. Please see the image below for a comparison of the changes.

My <b>Company</b> . Inc.	𝒞 ײ ថ 🛱 >	• My <b>Company</b> . Inc.	ø ≝ ¤ ≡  ເ→		
THERE ARE 2 TASKS IN THIS DOCUMENT					
🛃 Acknowledgement: MyCompany NDA		Acknowledgement: TestPDF			
Task ID:	100.000	Task ID:	100 AU		
Туре:	Acknowledgement	Туре: А	cknowledgement		
Status / ID:	Completed / 4	Status / ID: Co	ompleted / 4		
Document Title:	MyCompany NDA	Document Title: Te	estPDF		
🕑 Initials: MyCompany NDA		🛃 Signature: TestPDF			
Task ID:	10110100	Task ID:	1000 ALC:		
Туре:	Initials	Type: Si	gnature		
Status / ID:	Completed / 4	Status / ID: Co	ompleted / 4		
Document Title:	MyCompany NDA	Document Title: Te	estPDF		

## • [PEP-7029] ~ControlPanel ~UI/UX ~Workflows

Fixed issue where the Custom Email Message would not display on the Launch Page if there were no other required fields for a Participant. Please see the images below for the referenced setting and an example of the Launch Page.





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. $\checkmark$				
Completed Notifications	Full Name:				
Workflow Actions	PO Approver				
Workflow Rules	Email Address:				
Event Subscriptions					
Placeholders	Phone Number:				
PDF Fields					
Launch Rules	Title:				
Launch Display					
Launch Domain Restrictions	Organization:				
Launch Labels					
dashboard	Quick Stats Workflow Templates Pending Signature	s			
C Workflow Templates > Lau	inch				
MyCompany	PO: 22062				
PO Approver	Custom Email Message (optional):				
Edit Insert Format Table Tools					
	$B  I \; \coloneqq \; \underbrace{A} \; \lor \; \underbrace{\mathscr{I}} \; \lor \; \mathscr{I} \; \Join \; \diamondsuit \; \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$				

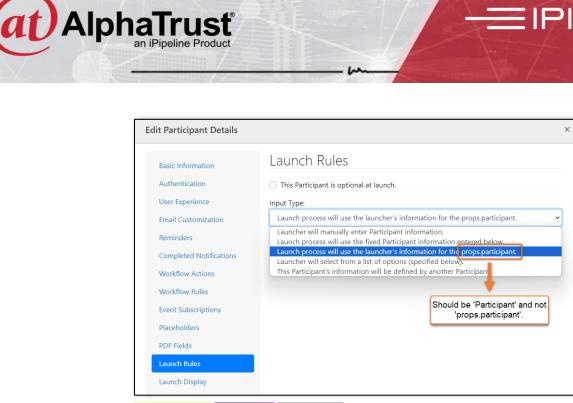
dashboard	Quick Stats	Workflow Templates Pending Signatures		
C Workflow Templates > Launch		Bulk Launch		
MyCompany PO: 2	2062			
PO Approver	Custom Email Message (optional):			
	Edit Insert Format Table Tools			
	$B  I  \boxminus  \blacksquare  \blacksquare  \underline{A}  \lor  \underline{\mathscr{I}}  \lor  \mathscr{P}  \boxtimes  \diamondsuit  \diamondsuit$	K 3		
	2			
	P	POWERED BY TINY 🔏		
	🛃 Send Workflow			

## • [PEP-6949] ~Authentication ~Security ~Forms

Fixed issue where auto-complete would not be fully disabled when turned off. Added autocomplete="off" properties to all login and data collection fields during signing process in workflows.

## • [PEP-6851] ~UI/UX ~Workflows

Fixed issue where a typo was seen in one of the Input Type options on the Participant Details pop-up. Please see the image below for the referenced settings.



#### • [PEP-6313] ~ControlPanel ~Metadata ~Workflows

Fixed issue where when deleting Metadata, the values of the first Metadata name-value pair would be deleted instead of the selected Metadata name-value pair. This issue only occurred on the Workflow Details pop-up. Please see the example image below for additional details.

Edit Workflow Details			×		
Basic Information	Metadata				×
Expirations	Metadata 1		O Delete		
Notifications	Name:			Metadata	
User Experience	data1			Mata data 4	D bit
Email Sender	Value:			Metadata 1	O Delete
Event Subscriptions	value1			Name:	Metadata 2 should have
Metadata	Metadata 2		O Delete	data2	been deleted instead of replaceing the values of
Launch Display	Name:			Value:	Metadata 1.
Launch Rules	data2				,
Launch Web Forms	Value:		· · · · ·	Metadata 2	Oelete
	value2			Name:	
	Metadata 3		Ø Delete	data3	
	Name:			Value:	
	data3			value3	
	Value:			Add Metadata	
	value3				
	values				
	Add Metadata				Cancel 🗸 Update Workflow
Save as Preset		Cancel	✓ Update Workflow		

INNOVATION UNLEASHED