



Release 19.11

June 5, 2019

Agreement Express - New Features

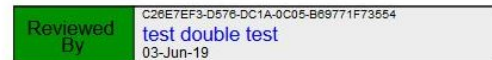
Review Signature block does not behave as intended

Affected Workflow: Transactions that include review signatures. Review signatures do not require wet sign rendered on the page.

Feature Description: Review signatures will now correctly display with the 'Reviewed By' label once signed.

A handwritten signature in black ink that reads "test".

This is what Review Signature used to look like



This is what it looks like now

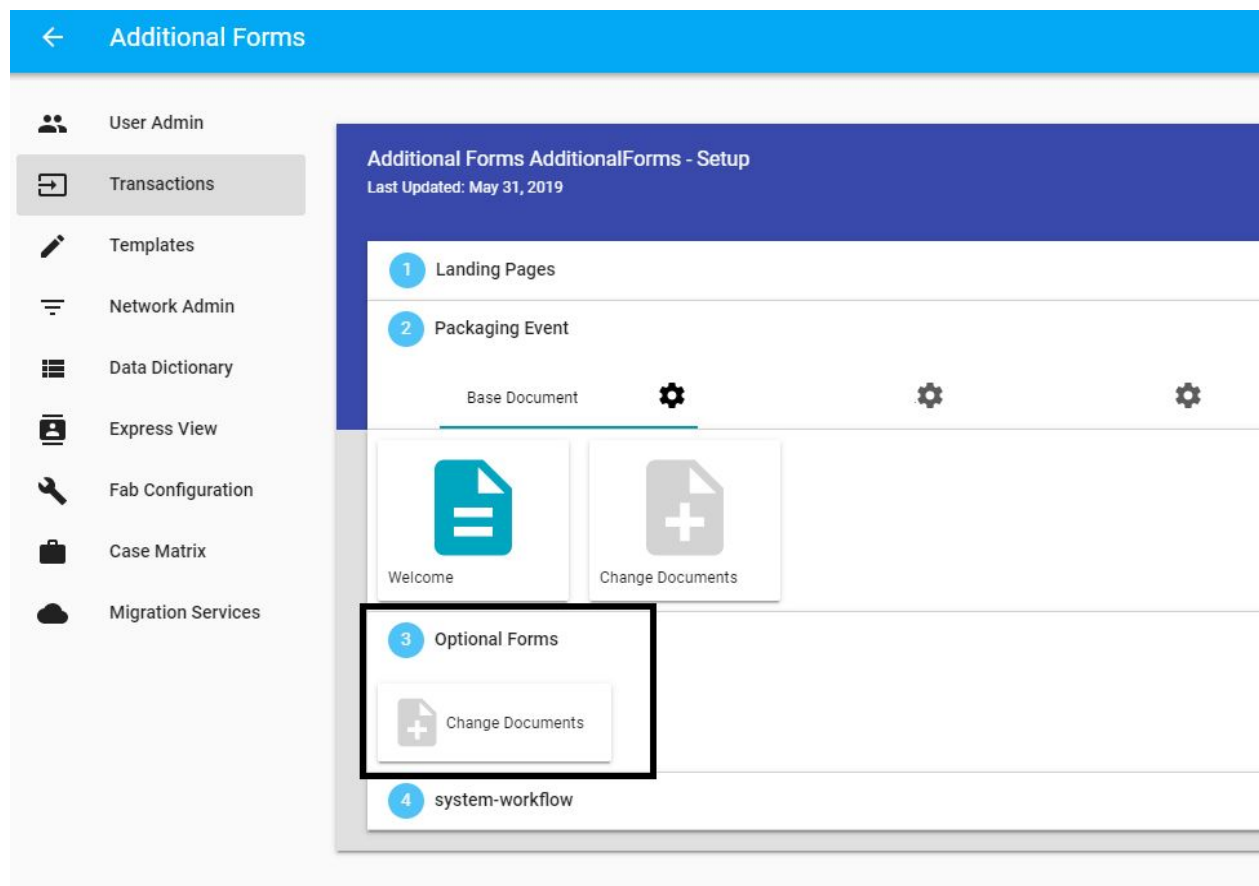


Agreement Express MV2 - New Features

Update the existing transaction package UI to include a section where you can add optional forms

Affected Workflow: Transactions that include optional forms.

Feature Description: Company administrators will be able to edit optional forms in the Administrator Panel > Optional Forms while in the landing page, prior to the launch of a transaction.



After adding the Optional Forms, when launching a new transaction, the publisher will be prompted to include the form.



A screenshot of a web application interface titled 'Transaction Configuration'. The main area shows a transaction named 'TDA - IRA Application v3' with an 'OPTIONAL FORMS' dropdown menu. Below this, there is a list of optional forms with checkboxes, including 'TDA - TD Ameritrade Institution...'. On the right side, there is a sidebar with a list of optional forms, each with a checkbox. The 'TDA - IRA APPLICA...' form is checked. At the bottom right, there is a blue button labeled '+ LAUNCH TRANSACTION'.

Additionally, in the Landing Page, the publisher can click on the Optional Forms button and configure whether to include the Optional Forms, and how many copies to include:

A screenshot of the 'IRA Application' form with a modal dialog box open. The dialog is titled 'Configure Optional Forms for Transactions' and shows a list of optional forms. The first form is 'TDA - IRA Application v3 - AEXProvider' with a checked checkbox and a quantity of '1'. There are minus and plus buttons next to the quantity. A 'CLOSE' button is in the bottom right corner of the dialog. The background form shows fields for 'Account Information' and 'Account Owner'.