Agreement Express Release Notes
Release 19.20
11.27.2019

MV2 UI UPDATES

Company Image for Publishers

Impacts all Users with the Role: Publisher

Description: The Company Image will now always load for Publishers and Company Admins in Workspace.

Example: The company logo on the top right corner of the Workspace had previously only been visible to users set to Company Administrator. Publishers will now be able to see this as well.

A Feature that can delete multiple records in Pre-fill section

Impacts Workflows subscribed to custodian Landing Pages (TDA & Pershing ONLY)

Description: The Pre-Fill feature allows a user to upload mass client data through the use of a CSV. This added feature addition will now permit the AEX user to delete client records on mass rather than being required to delete individually.

Automatically Zipping Document Packages

Impacts Workflows which include a 2-Way CRM Integration

Description: In workflows which include a postback to the client CRM, this update automatically ensures all document packages are zipped prior to posting back to the CRM.

Example: A Transaction is launched in Agreement Express, the package is sent to the client, all signatures are complete and the document package is sent back to the CRM. Previously, these were sent in separate files and only zipped at a certain size threshold. This update will zip all files regardless of size.

Transaction Bug Fix

Impacts ALL Workflows

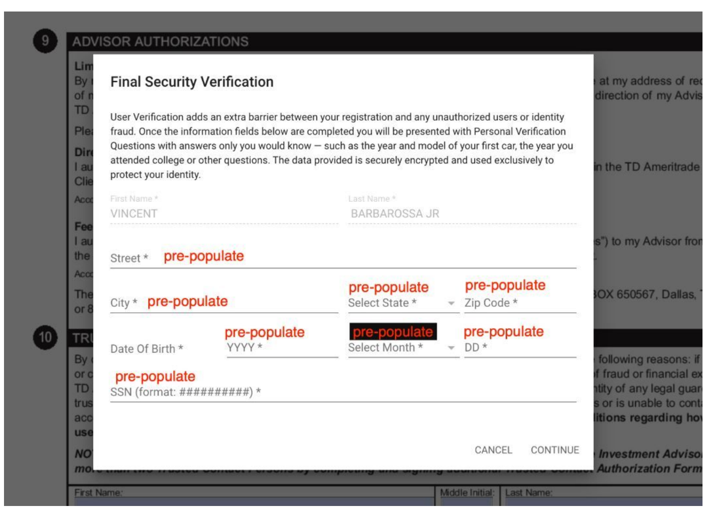
Description: Enhancements to all transaction-level events.

Example: At times, transaction-level events would trigger even when a condition was not met. This bug fix will eliminate the scenarios where this occurs.

Pre-Population of LN Fields

Impacts ALL Workflows utilizing The TDA & Fidelity Offerings

Description: When a signer is prompted with Lexis Nexis instantID Verification, the input fields will be pre-populated from data from the landing page. This greatly simplifies the AEX registration process and reduces duplication of entry.



Example: Publisher inputs data into a landing page, sends document package out for signing. Signer opens the document package and is prompted with LN pop-up containing ID verification. First Name, Last Name, and SSN will be pre-populated and marked as read-only. Address will also be pre-populated but the user will have the ability to edit these fields.