

Agreement Express Release Notes  
Release 20.06  
4.29.2020

## MV2 UI UPDATES

### Company Admin Rights

**Impacts:** All Company Administrators registered on the AEX platform

**Description:** Company Administrators, by default, can now cancel and rewind incomplete transactions without any special requests or configurations.

### Bulk Send Feature Update

**Impacts:** All companies using Bulk Send - Publisher, Admins  
Transitions Customers

**Action Required:** In order to activate this feature, contact your Customer Success Manager or submit the feature activation request via email to [support@agreementexpress.com](mailto:support@agreementexpress.com)

**Description:** The Bulk Send for Transitions tool allows users to easily complete a Transition from beginning to end by focusing on the following features:

1. Intuitive upload and package creation
2. User access and permissioning
3. Error handling and correction
4. Sorting and Tracking
5. Mass sending and printing

## New Bulk Send UI

New Bulk Send navigation icon within Workspace provides users access to the new Bulk Send UI and all functions.

## Uploads

Create Bulk Send uploads using the Uploads tab. Upload a CSV, check for errors, grant user access, add tags and publish cases all from this tab.

Bulk Send					
	Upload Name ↑	Date Uploaded	Created By	Cases	Transactions
Cases	1-h-workgroup-1	Apr 10, 2020	Huan Mai	-	-
Uploads	Bug Verify	Apr 13, 2020	Y Huynh	1	1
	Carolyn Error 2 <span style="color: red;">!</span>	Apr 06, 2020	Carolyn Edgeworth	-	-
	Carolyn Test 20.06	Apr 20, 2020	Carolyn Edgeworth	4	5
	htest-50-1	Apr 07, 2020	Huan Mai	50	50
	htest-50-2	Apr 07, 2020	Huan Mai	50	50
	Spero Test	Apr 07, 2020	Spero Langaditis	1	1
	Spero Test 3	Apr 06, 2020	Spero Langaditis	50	50
	Spero Test 7	Apr 07, 2020	Spero Langaditis	3	3
	Test	Apr 07, 2020	Spero Langaditis	3	3
	TestUpload3	Apr 07, 2020	Spero Langaditis	3	3
	TestUpload45	Apr 03, 2020	Spero Langaditis	7	7
	YH Run test.csv	Apr 10, 2020	Y Huynh	-	-
	YH Run test.csv 2	Apr 10, 2020	Y Huynh	-	-
	YH Verify Bug	Apr 13, 2020	Y Huynh	1	1

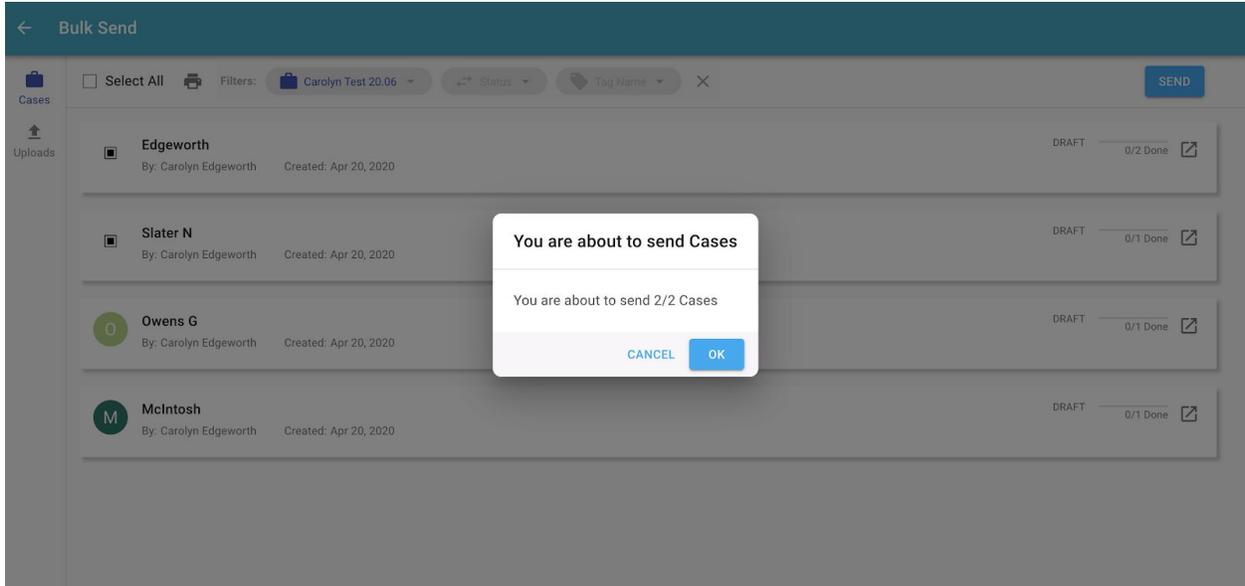
## Cases

View Bulk Send cases in the Cases tab. Sort, filter, track, print and send cases all from this tab.

Bulk Send					
	Select All	Filters:	Status	Tag Name	SEND
Cases	<input type="checkbox"/>	Carolyn 21.04.2020	↔		
Uploads					
	<input type="checkbox"/>	<b>Owens G</b> By: Carolyn Edgeworth Created: Apr 21, 2020	DRAFT	0/1 Done	
	<input type="checkbox"/>	<b>Mcintosh</b> By: Carolyn Edgeworth Created: Apr 21, 2020	DRAFT	0/1 Done	
	<input type="checkbox"/>	<b>Slater N</b> By: Carolyn Edgeworth Created: Apr 21, 2020	DRAFT	0/1 Done	
	<input type="checkbox"/>	<b>Edgeworth</b> By: Carolyn Edgeworth Created: Apr 21, 2020	DRAFT	0/2 Done	

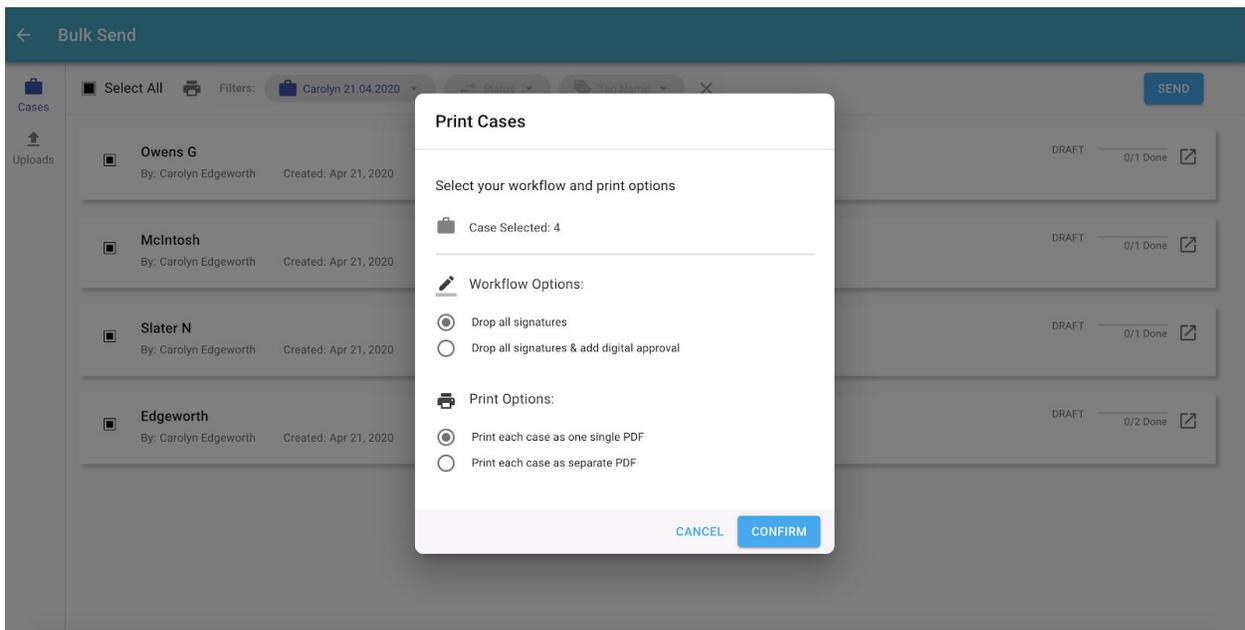
## Mass Send

Send Cases on mass using the Send function. Select all cases or select individual cases to be sent to recipients.



## Mass Print

Print Cases on mass using the Print function. Select all cases or individually select cases to print. Choose workflow and print format options depending on your desired workflow.



Business Rules - Where are these created? To confirm, these are connected to the forms themselves?

Work Groups give access to other users to see the documents, make edits, and change the data in the document.

CSV files only, xls files in the future

Print Cases options: Add Digital Approval, case