

Agreement Express Release Notes

Release 20.09

7.2.2020

MV2 UPDATES

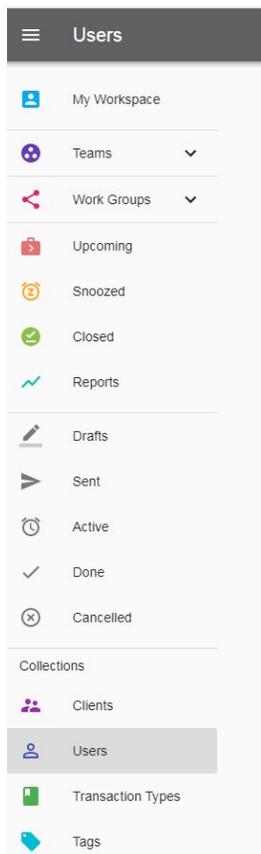
Bug Fixes & Enhancements

The 20.09 Release is scheduled for deployment on July 2nd, 2020. Included in this release will be some fixes and enhancements to some net-new features currently in Pilot Phase.

The Bug Fixes below will also be part of the 20.09 Release:

- Print, Sign, and Send intermittent error messages appear from time to time when a publisher clicks on Print, Sign and Send. This issue will now be resolved.

Removing Publisher's view of Users Collections in Workspace



Why did we make this change?

The data in the "User" section of Collections is not used by publishers and need not be visible. The removal of the "User:" section will provide clarity to the publisher regarding their next action by clearing up the workspace.

Who is impacted by this change?

All Publishers in AEX.

Action Required: No action is required in order to activate this new feature. Publishers will no longer be able to access the "User" view of the Collections section following the 20.09 Release.

Description:

This removes the ability for Publishers to view the Users collection in Workspace.

FEATURE UPDATES

Bulk Send Filter Enhancements

Why did we make this change?

When leveraging The Bulk Send Feature, Publishers are looking at tens of hundreds and possibly thousands of transactions. This can be overwhelming and confusing to a user who is trying to understand what needs to be actioned next! By adding a filter for signatures and approvers, Publishers will get much quicker insight into who needs to sign and approve next in order to reduce bottlenecks in the workflow of the transaction.

Who is impacted by this change? All Publishers in AEX who are Using The NEW Bulk Send Feature

Action Required: No action is required in order to activate this new feature. Publishers using the New Bulk Send Feature will have access to these filters following the 20.09 Release. If you are not currently using the New Bulk Send Feature, please reach out to your CSM to Learn More!

Description: In the New Bulk Send UI, two New Filters have been added to assist in sorting cases:

The Signature Filter - When a Publisher checks the Signature Filter, cases that have one or more transactions awaiting a signature will be displayed. This will display on the Transaction Card and will indicate the signer who is next in line to sign.

Approval Filter - When a Publisher checks the Approval Filter, Cases that have one or more transactions requiring an approver will be displayed. A user can filter with one or multiple departments. This will display on the Transaction Card and will indicate which department has transactions awaiting an approver.

Wet Sign Enhancements

Why did we make this change?

These changes improve the user experience using our Wet Sign functionality.

Who is impacted by this change?

All Users using Wet Sign to complete transactions.

Action Required: No action is required in order to activate these improvements following the 20.09 Release.

Description: When choosing the Wet Sign option, users are now given the following options:

1. Drop all signatures - All digital signature placeholders will be dropped from the documents, the Case Status will be set to DONE and the Case will be tagged with 'Printed'.
2. Drop signatures and add digital approval - Signature place holders will be dropped, a digital approval for the Publisher will be added and the Case will remain open and will be tagged with 'Printed'.