Agreement Express Release Notes
Release 20.14
10.06.2020

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The 20.14 Release is scheduled for deployment on **October 14th, 2020**. Updates will be available in your production environment on **October 15th, 2020** unless otherwise noted. Included in this release will be some enhancements to some net-new features in addition to enhancements to current features you may already be familiar with. Please reach out to your Customer Success Manager (CSM) should you have any questions about this release or its impact to you or your end clients.

AEX CORE UPDATES

Hide Repeating Sections of Landing Pages

Why did we make this change?
If fields are not required by you or the document receiver, we do not want you, our users, to have to spend additional time inputting data into these fields! Specific repeating sections such as addresses need only to be inputted one time. Once data is inputted into those fields, the requirement for them will disappear from subsequent sections in the Landing Page requesting that information. In the below screenshot, DTC Number and Advisor email are only required for the first Authorized agent and not asked again in a secondary section requesting the same data for additional Authorized agents.

Who is impacted by this change?
All Publishers and Company Administrators of Agreement Express publishing transactions will see this update.

Is any Action Required?
No action is required in order to activate this new feature. If you have specific concerns about how this change affects your clients, please feel free to reach out to your CSM directly.

Description: Sections on your landing page which request the same information will no longer require your data entry every time. Example: For Account Owner 1 Name, DOB, SSN, Phone Number and Address is required to be collected, but subsequent addresses for Account Owner 2 need not be collected.

Signature Enhancements - Default Cursive SVG Signature

Why did we make this change?
The Signature Registration process requires multiple steps for an end user. To one-time users of Agreement Express, the registration process can seem labor-intensive. In order to reduce the number of clicks the end signer must perform in order to sign a document, we added the ability for an end user to choose a default signature instead of needing to create their own.

Who is impacted by this change?
All Net-New End Signers who are requested to sign a document will now see this option. Do note, the option to register a signature on a desktop **HAS BEEN REMOVED.**

Is any Action Required? This feature is disabled by default, please contact support to have it enabled in your company at support@agreementexpress.com.

Description:
This feature creates the ability for end-clients to use a default cursive font SVG Signature when registering. This removes the requirement for the registrant to create a finger-swipe signature. The 2 options will appear below for completion of the signature registration:
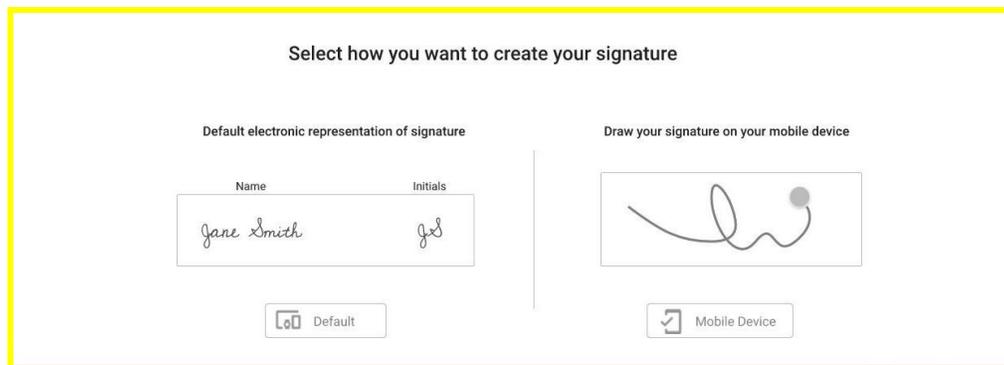
Ability to Clear Radio Buttons on Landing Pages and Signing Documents
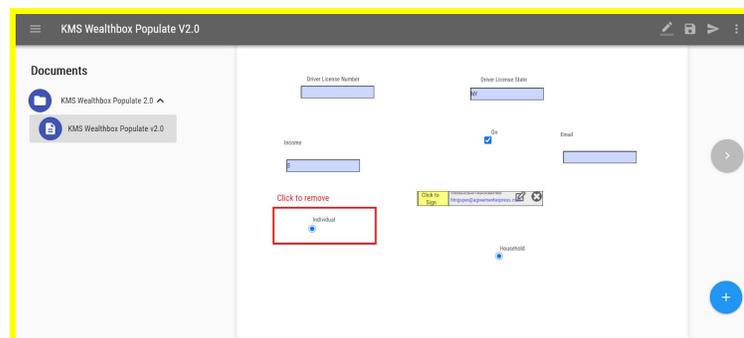
Why did we make this update?
In an effort to optimize the user experience, we want to allow for changes to be made on the signing templates sent to customers. Many users indicated that the ability to remove a radio button would greatly enhance the user experience and reduce the need to return the document to publishing mode if a mistake was made.

Who is impacted by this change?
The change applies to all workflows developed in the approximately the last 18 months (Responsive Landing Pages). End clients receiving documents will now have the ability to unclick radio buttons should they have edit rights to these fields. If you are unsure if your pages are built in Responsive, please do not hesitate to reach out to your CSM.

Action Required: No action is required in order to activate this new feature.

Description: As a user, you can clear a radio button selection in all viewers (responsive LPs and signing documents) . Radio button values can now be cleared by clicking on the selected radio button. Once clicked, the selected radio button will clear the radio button value and it will become unselected.

Loading Screens on Reports
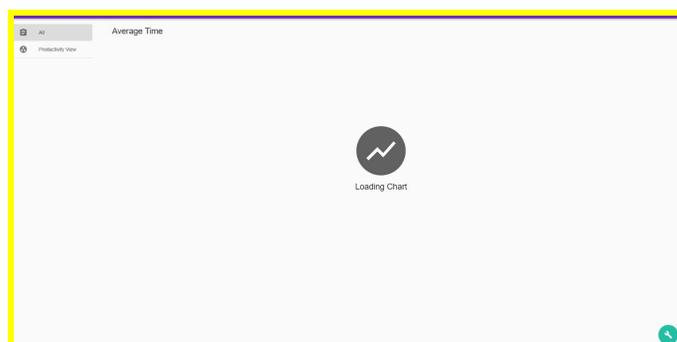
Why did we make this update?
Previously when pages were loading in reports, there was no way for a user to understand whether the reports were still running. This can make the user believe that the reporting feature is not working when it is actually generating data on the back end.

Who is impacted by this change?
The change applies to ALL users with access to the reports feature in Agreement Express.

Action Required: No action is required in order to activate this new feature.

Description: When running reports that take time to process and present data, a Loading Chart message will be displayed to inform the user that the report is being prepared.

Submit Individual Transactions to CustodianAPI

Why did we make this update?
Previously when document packages were created, each transaction in a package was required to be completed prior to the package being sent to the respective API. Clients were noticing that there is a preference to send document packages through on an individual basis rather than waiting for the full package to be complete before sending to the API. This allows AEX clients to decide on a company level if they would like transactions within a package to be submitted to an API as each transaction is completed, or wait for an entire package to be complete before API submission is triggered.

Who is impacted by this change?
The change applies to all Company Administrators and Company Administrators of AEX.

Action Required: In order to activate this feature, please reach out to your CSM or contact support@agreementexpress.com to request this feature.

Description: Transaction events, typically an API post back event, now can be executed on transaction completion. Previous functionality required the entire case to be complete (have a Done status) before any transaction would be sent through the applicable API. Customers will now have the choice of triggering a transaction event when the entire case is complete or a single transaction complete. This is configured on the transaction event itself, for the entire company.

Example: A household package contains five transactions; two accounts for Heather, two accounts for John and one joint account for Heather and John. If Heather completes signing her documents, her two personal accounts can be sent to the API without having John's be complete.