

# Contents

<b>EDOCS CHANGES</b> .....	<b>2</b>
<b>Presenter App</b> .....	<b>2</b>
<b>Back Office Changes</b> .....	<b>4</b>
<b>ERECORDING CHANGES</b> .....	<b>6</b>
<b>Record Deeding Batch</b> .....	<b>6</b>
<b>TECHNICAL NOTES</b> .....	<b>7</b>
<b>UPGRADE NOTES</b> .....	<b>7</b>

## EDOCS CHANGES

### Presenter App

- Buyers can now be emailed their documents if the buyer's email was included during contract import.
  - If an email for the buyer is provided, clicking Complete will take the presenter to email verification screen.

Buyers will receive emails to the following addresses for their signed documents from DocuSign.

KEVIN JOHNSON	mail@mail.com
---------------	---------------



[More Options](#)

- Click continue to take the buyer to sign the takehome acknowledgement.
  - If printing is required, the presenter will be shown the printing options popup.
- Click More options to show the USB/CD/printing options.
- If an email is not provided, the buyer will not be emailed the documents, and the email verification screen is now shown.
- Note: after documents are fully signed (which includes back office signing), the buyer will receive the document via email.
- Presenter app will now show all signers on the document once the document has started the signing process.

The screenshot shows the Informa software interface for document signing. On the left, a sidebar contains a green header 'Sign My Documents', a list of documents including 'CONTRACT FOR PURCHASE...', and a 'Begin Signing' button. The main area displays a document titled 'WESTGATE Lakes I Quit Claim Deed'. A 'Signers' modal window is open, listing 'KEVIN JOHNSON' as 'Buyer 1' with a pencil icon, 'CFI CFI' as 'Closing Officer', and two 'Witness' roles. The document text includes 'THIS QUIT CLAIM DEED', 'Parcel I.D. # 02-24-28-9200-99-999', and 'TO HAVE AND TO HOLD'.

- Pencil next to the signer indicates that the signer has started the signing process.
- If there is no icon, the signer has not started the signing process.
- Once all signers have signed, the pencil next to the document will become a checkmark.
- Certified delivery option has been added to non-signed, presented documents.
  - If certified delivery is enabled, non-signed, presented documents will have a **Present** button instead of the Begin Signing button.

- After Present is clicked, the buyer signing will display the document like a signed document. Instead of signing the document, the buyer will only be able to view the document, then click the **Close** button to move forward.

## Back Office Changes

- Branding section has been added to system configurations.
  - The following can be configured in the branding section:
    - Presenter:
      - Congratulations message
      - Congratulations image
    - Buyer Signing:
      - Congratulations Heading
      - Congratulations Message
      - Page's font color
      - Page's background color
      - Panel's font color
      - Panel's background color
    - Logos:
      - Web banner
      - Presenter

Branding Configuration

**Presenter Application:**  
 Note: Max characters allowed for display text is 247  
**Congratulations Message:**

**Custom Congratulations Image:**  
 No file chosen

---

**Buyer Signing**  
 Note: Max characters allowed for display text is 247  
**Congratulations Heading:**

**Congratulations Message:**

---

**"Waiting for Documents" and "Configurations" screens**  
**Page:**  
 Font Color:  Background Color:   
**Panel:**  
 Font Color:  Background Color:

---

**Logos**  
 Please upload an image for the Web Banner and Presenter Application Logos  
**Web Banner:**  No file chosen  
**Presenter:**  No file chosen

- **Reset Brandings** will reset all changes back to default values.
- **Preview** allows the user to view the current changes for the buyer signing and the presenter app.
- **Save** will save the changes that have been made.
- **Cancel** will take the user back to the system configurations screen without saving changes that have been made.
- For more information on branding, please review the “eDocs\_Branding\_Customization.docx”.
- System Configuration section has been added to system configurations.
  - Certified delivery: If this setting is enabled, non-signed documents that are marked to be presented will require to be acknowledged by the buyer(s) that they have seen the document. Non-signed documents will be converted to envelopes in DocuSign for the acknowledgment process to complete.

System Configuration

If this setting is enabled, non-signed documents that are marked to be presented will require to be acknowledged by the buyer(s) that they have seen the document. Non-signed documents will be converted to envelopes in DocuSign for the acknowledgment process to complete.

Enable Certified Delivery

- **Save** will save the changes that have been made.
- **Cancel** will take the user back to the system configurations screen without saving changes that have been made.
- The User Administration screen has had addition columns added (CP User, User Admin and System Admin) to the grid. Columns order can be re-arranged and columns can be hidden from the grid.

## ERECORDING CHANGES

- The eRecordingStatus attribute of docs that are required for eRecording but not recorded are no longer updated.
- Recording API has been added to eRecord docs that are not associated with eDocs.

## Record Deeding Batch

- Accounts that are not fully signed show as an error and cannot be submitted.

Record Deeding Batch Input Form

Select Deeding Batch: 1006

Account Numbers:

✖ 37	Recording data
✔ 38	Purchase Price: \$123.00
	Amount Financed: \$123.00
	Developer Entity: Villas

Following errors have been found:  
Documents pending signature: WARRANTY DEED ONLY, WARRANTY DEED.

Documents Recording Order

CONTRACT FOR PURCHASE AND	↑
WARRANTY DEED ONLY	↓

- Accounts that have miscellaneous errors to the account shows as an error and cannot be submitted.

Record Deeding Batch Input Form

Select Deeding Batch: 1006

Account Numbers:

✖ 37	Recording data
✔ 38	Purchase Price
	Amount Financed
	Developer Entity
	Villas

Following errors have been found:  
Account is: missing Amount Financed, missing Purchase Price

Documents Recording Order

CONTRACT FOR PURCHASE AND	↑
WARRANTY DEED ONLY	↓

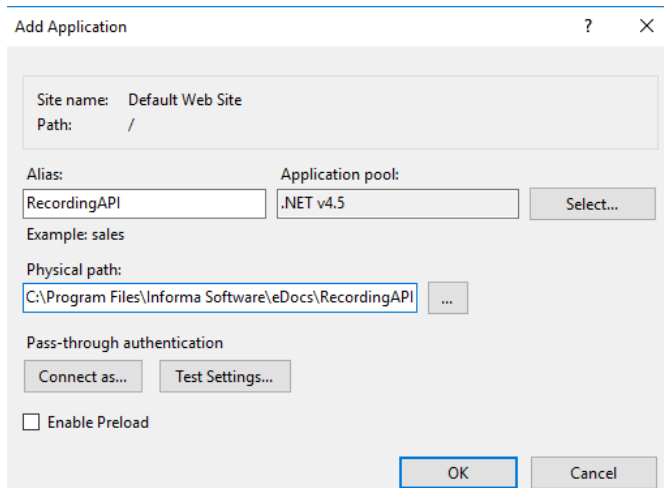
- Note: to update the status of the account, the user may have to reopen the plugin.

## TECHNICAL NOTES

- For the contract import XML, an optional email element has been added to the signer element.
  - Email ex:
    - `<signer name="KEVIN JOHNSON" type="BuyerOne" email="mail@mail.com" />`
  - Validation of the email must be completed by the origination system.
  - If the original XML had an email for the buyer, replacements with a different email address for the buyer will not be valid. The contract must first be voided before a replacement can take place.

## UPGRADE NOTES

- **Before the upgrade:**
  - “Drop Columns Exported & Redact From Document.sql” script must be run in order for eDocs to function properly after the upgrade.
- **Immediately after the upgrade:**
- On prem:
  - RecordingAPI application is required for eRecording and can be added in IIS
    - Alias: recommended name is RecordingAPI
    - Application pool: .NET v4.5
    - Physical path: default path is:
      - C:\Program Files\Informa Software\eDocs\RecordingAPI



- Click OK once completed.
- Go to the newly created application and go to Authentication
  - Verify that Anonymous authentication is enabled.
- Restart IIS
- Azure Hybrid Environments
  - The Recording API will be added as part of the deployment process.
- **After the upgrade** (not necessarily immediately):
  - The RecordingAPI must be added to the database for eRecording under eRecordingConfig.RecordingApiUrl.
    - Example Url: <https://{serverName}/{RecordingApiName}/api/>
- To setup buyers to receive emails of documents from DocuSign the following configuration setting must be set under the Signing Settings.

## Envelope Delivery

- Attach documents to completion email
- Attach certificate of completion to envelope
- Suppress emails to embedded signers
- Send completion emails to embedded signers
- Allow account users to decide if they should send a link or attach a PDF