Contents

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 |

Continue

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.

- o Pencil next to the signer indicates that the signer has started the signing process.
  - o 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.
  - o 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

- o **Reset Brandings** will reset all changes back to default values.
- o **Preview** allows the user to view the current changes for the buyer signing and the presenter app.
- o **Save** will save the changes that have been made.
- o **Cancel** will take the user back to the system configurations screen without saving changes that have been made.
- o For more information on branding, please review the "eDocs_Branding_Customization.docx".
- System Configuration section has been added to system configurations.
  - o 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   Cancel

- o **Save** will save the changes that have been made.
  - o **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
- ✔ 38

Recording data

Purchase Price   Amount Financed
$123.00 $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.
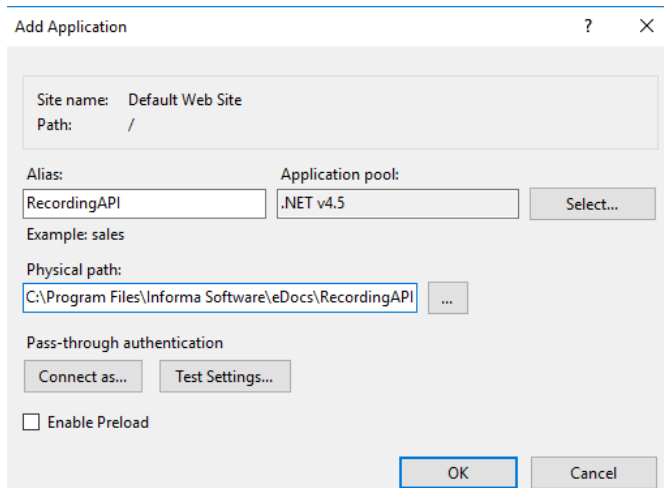
- Note: to update the status of the account, the user may have to reopen the plugin.

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.

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