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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 J	OHNSON	mail@mail.com	
	Contin	ue	

More Options

- \circ $\,$ 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.



Sign My Documents	This Instrument was Prepared By: LEOMARD LIBART, ESQ. GREENRSPOOR MANDER, P.A. 100 WEST CVIRTESS CREEK RB, #700	
CONTRACT FOR PURCHASE	FILLAUDERDALE, FLORIDA 33300 3067916203-003 WESTGATE Lakes I Quit Claim Deed	
QCD	Parcel I.D. # 02-24-28-9200-99-999	
QCD	Witness Print Name	sum mov title of pi , Asst , lic ben and sealed mete pr Dzie Hinton Delores N Johnson
Begin Signing	Witness Signature	Kevin L Johnson

- \circ $\;$ 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.



<u> </u>			ŵ Ü Ü
Sign My Documents	INCH 003 Resert	DENTAL BENEFIT ACKNOWLEDGMEN AND DISCLOSURE STATEMENT	T 38145433603-
CONTRACT FOR PURCHASE	The Developer of the al Perclosers at the above designate Waiser of Developer Internal E Description of Ioscidental Benefit The incidental benefit in	xchange Fee to be used with the Bonus Week Certific (Including Value of Benefit): a Waiver of Developer Internal Exchange Fee to be used (I Certificate provides a coard (I) week vacation at the sur	te Lin conjunction with the Bomus baser's bome resort. The Waiver
WARRANTY DEED	Resort, and becomes valid six (6) Contract for Purchase and Sale, an and confirmation of the reservation	'ee allows purchasers to use the Bonus Week Certificate a months after, and no more than eighteen (18) mooths fro and requires the owner to pay the use fee set forth below as as. ht is up to \$150.00 for the Waiver of Developer Intensal 1	m, the date of execution of the the time of booking and
BONUS WEEK	accommodations are located), sha and costs associated with this luci	with incidental Benefit: schaive of sales and resort tax (if applicable in the jurisdi II be due at the time of booking and confirmation of reser- dental Benefit include, but are not limited to, all transpor- rinks, alcohole bevrappe, parhutine, personal services, y	vations. Other user fees ation costs, applicable taxes,
BONUS WEEK	and other incidental charges assoc Restrictions Upon Use and Availa	risted with travel services and other purchases.	ann fan Fridansen vir arkenen
	second master he in good standing maintenance steek, haven sold all of The use of or participant The incidental beaufit of The Waives of Devalues of the timeshare plan. This beam from the date of execution of the northe reserved or extradued. Yo constanced arrial/diffy or reserve		ment ascheding ifte semmed v voluntary. more than eighteen (15) months the incidental backing may or may n in reliance upon the
	In the event the Water the control of the Developer, the quality, value and term reasons	r of Developer Internal Exchange Fen heromes unava Developer reserves the right fo substitute a replacem ble similar to the unavailable incidental benefit.	ent incidental henefit of a type,
		PURCHASER Kevin Johnson	October 28, 2014
		PURCHASER	DATE
Present		PURCHASER	DATE

• 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: Congratulations to the new member of the family!	
Custom Congratulations Image: Choose File No file chosen	
Buyer Signing Note: Max characters allowed for display text is 247 Congratulations Heading: Welcome to our timeshare family! Congratulations Message: We sincerely hope that you and your family enjoy a lifetime of exciting vacations with u	
	Э.
"Waiting for Documents" and "Configurations" screens Page: Font Color: #000000	Background Color: #eeeeee
Panel: Font Color: #000000	Background Color: #ffffff
Logos Please upload an image for the Web Banner and Presenter Application Logos Web Banner: Choose File No file chosen	Presenter: Choose File No file chosen
	Reset Brandings Preview Save Cancel

- **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.





- \circ ~ 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.

elect Deeding Bat	ch: 1006	>
ccount Numbers:	Recording data -	
37 38	Purchase Price	Amount Financed
	\$123.00	\$123.00
	Developer Entity	
	Villas	~
	Following errors hav Documents pending DEED ONLY, WARR/	signature: WARRANTY
	Documents pending	signature: WARRANTY
	Documents pending	signature: WARRANTY NTY DEED.
	Documents Reco	signature: WARRANTY NTY DEED.

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



Record Deeding Ba	tch Input Form	
Select Deeding Batch: Account Numbers: 37 38	1006 v Recording data Purchase Price Purchase Price Amount Financed Developer Entity v Villas v Following errors have been found: Account is: missing Amount Financed, missing Purchase Price Documents Recording Order Description	Pag
	CONTRACT FOR PURCHASE AND	

• 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:
 - \circ $\;$ 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



Add Application	?	\times
Site name: Default Web Site Path: /		
Alias: Application pool:		
RecordingAPI .NET v4.5	Select	
Example: sales		
Physical path:		
C:\Program Files\Informa Software\eDocs\RecordingAPI		
Pass-through authentication		
Connect as Test Settings		
Enable Preload		
ОК	Cancel	

- 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: <u>https://{serverName}/{RecordingApiName}/api/</u>
- 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

