RELEASE NOTES

SUMMARISED FOR PUBLIC VIEWING

PLEASE NOTE:
This is a summarised catalogue of SigniFlow release notes, authorised for public viewing.

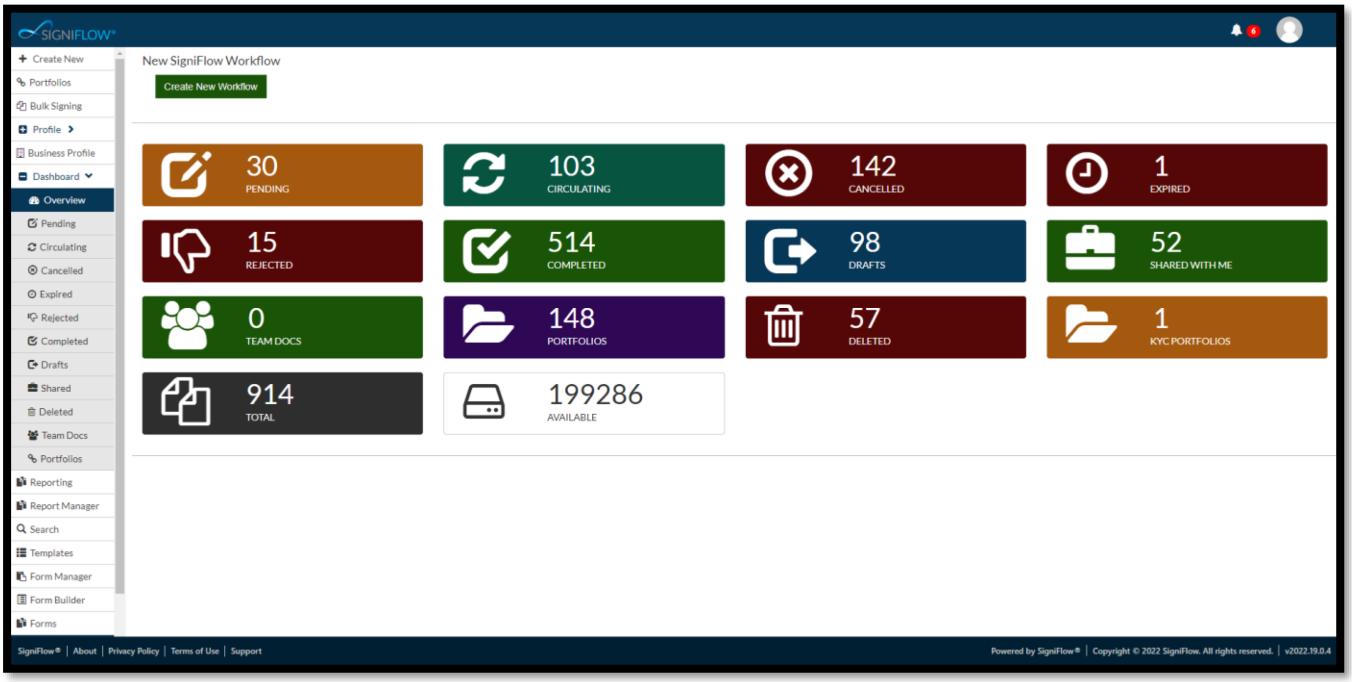
SIGNIFLOW®

Release Updates for
SigniFlow® V2022.19.1.6
09th November 2022

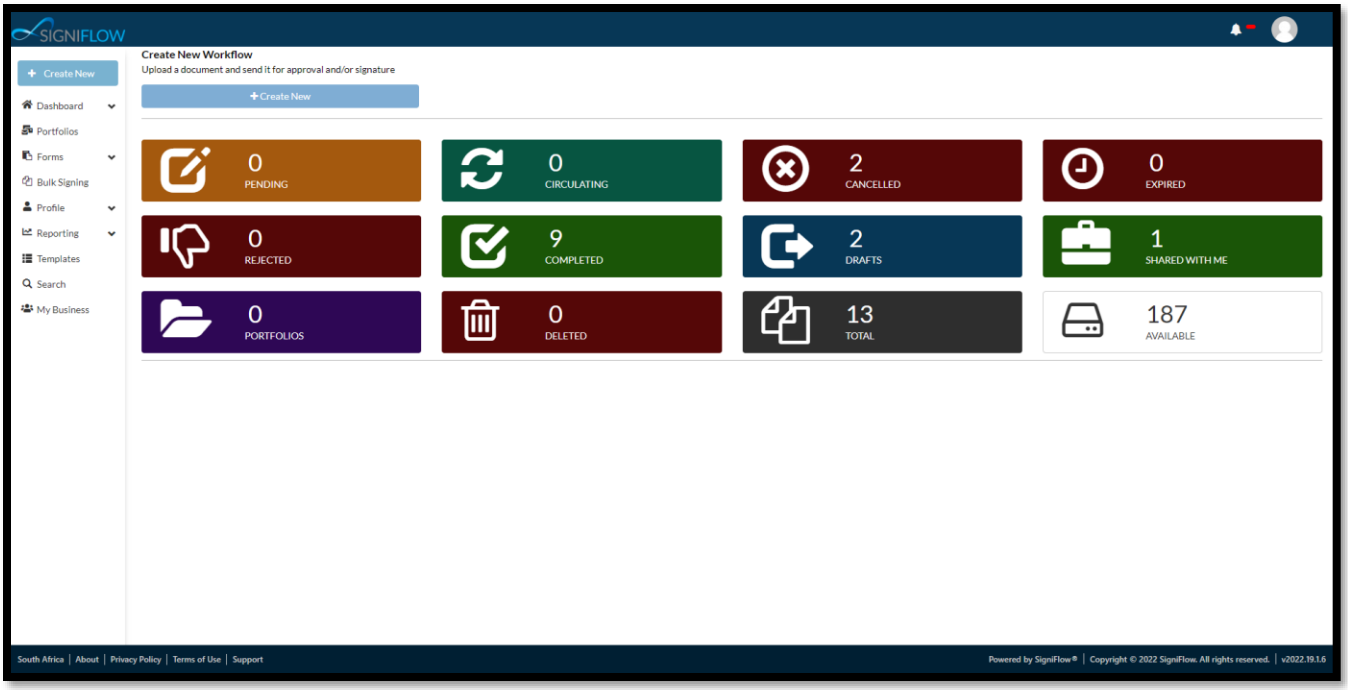
NEW FEATURES / ENHANCEMENTS (SYSTEM FRONT END)

New user interface for Dashboard

Old Interface



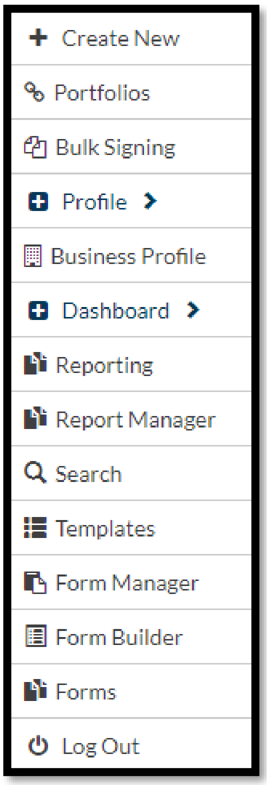
New Interface



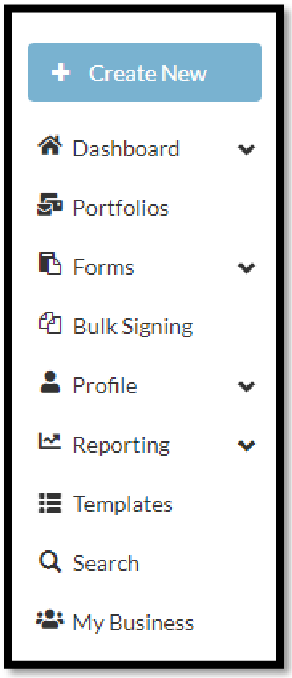
NEW FEATURES / ENHANCEMENTS (FRONT END)

- New ribbon-menu design.
- Menu items have been rearranged so that items with higher general usage are ranked higher up on the menu.
- Depending on the user's role, the menu items may display differently than on the illustration.
- Items that a user does not have access to, will not display on the menu.
- Throughout the Create Workflow screens, all buttons that indicate a 'Next' action, are now coloured light blue – as per the '+Create New' button indicated below:

Old Design



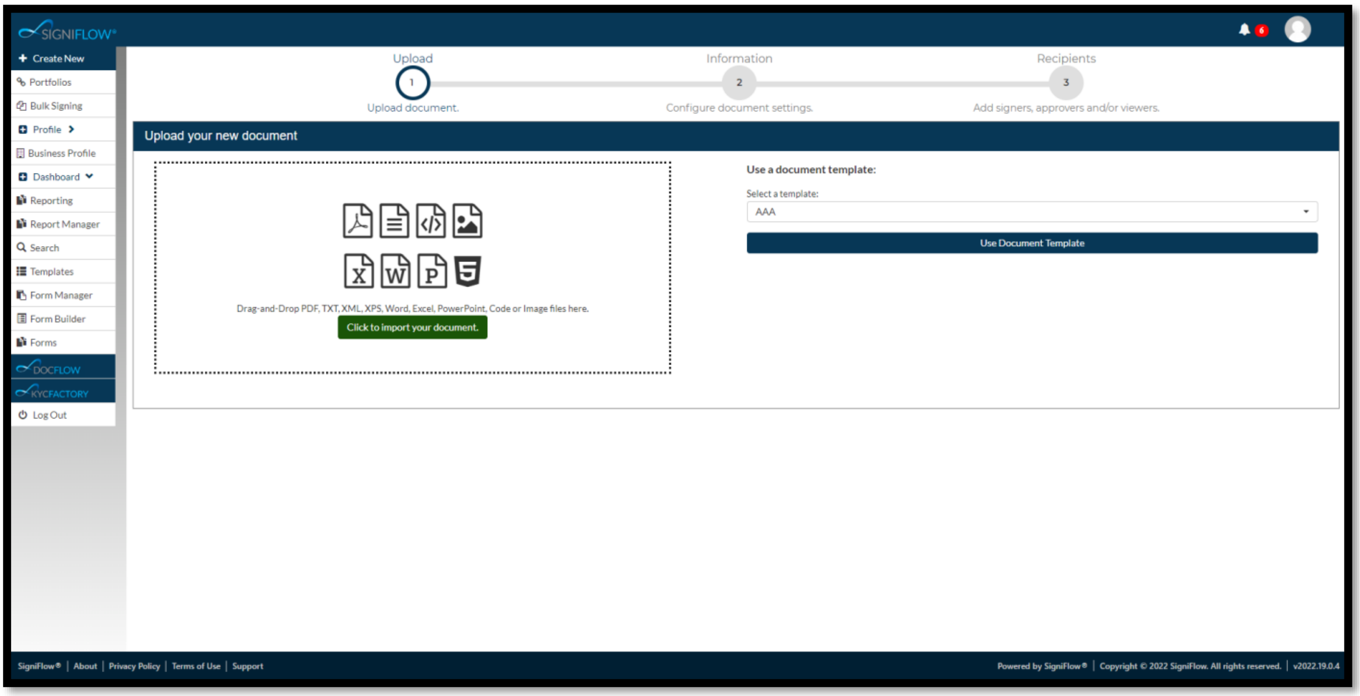
New Design



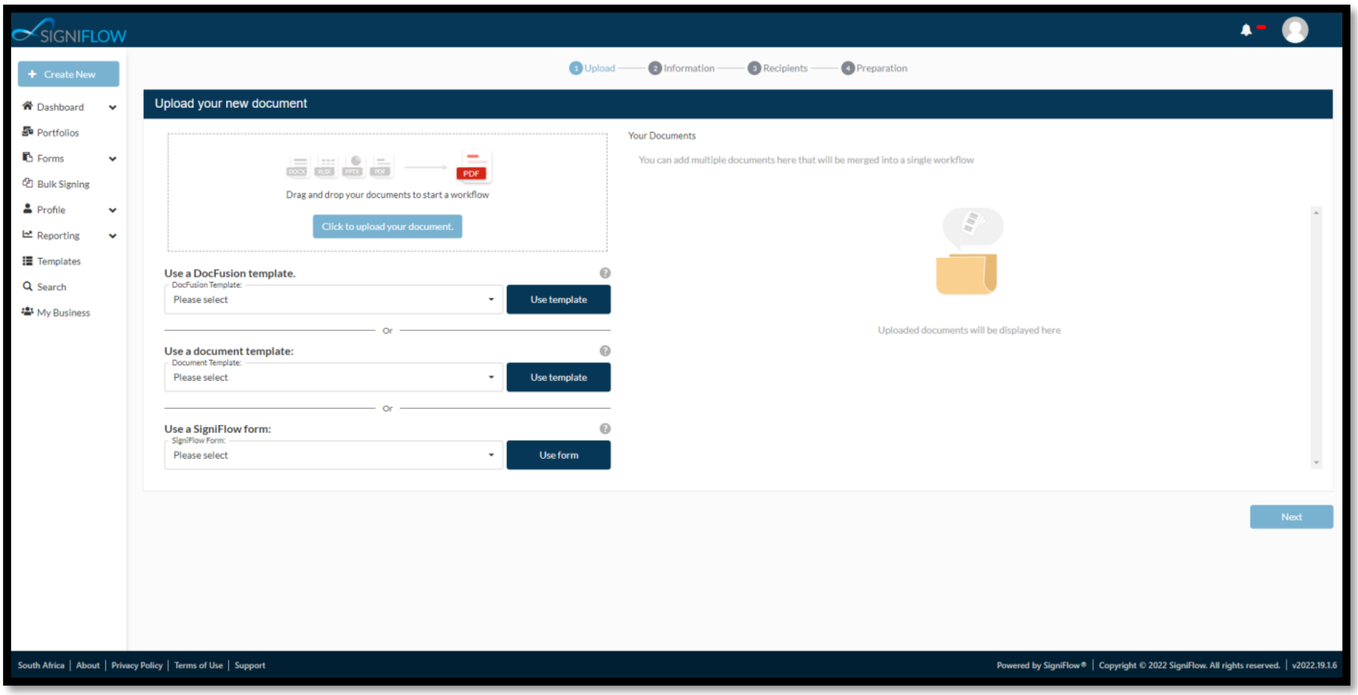
NEW FEATURES / ENHANCEMENTS (FRONT END)

New Create workflow user interface

Old Design



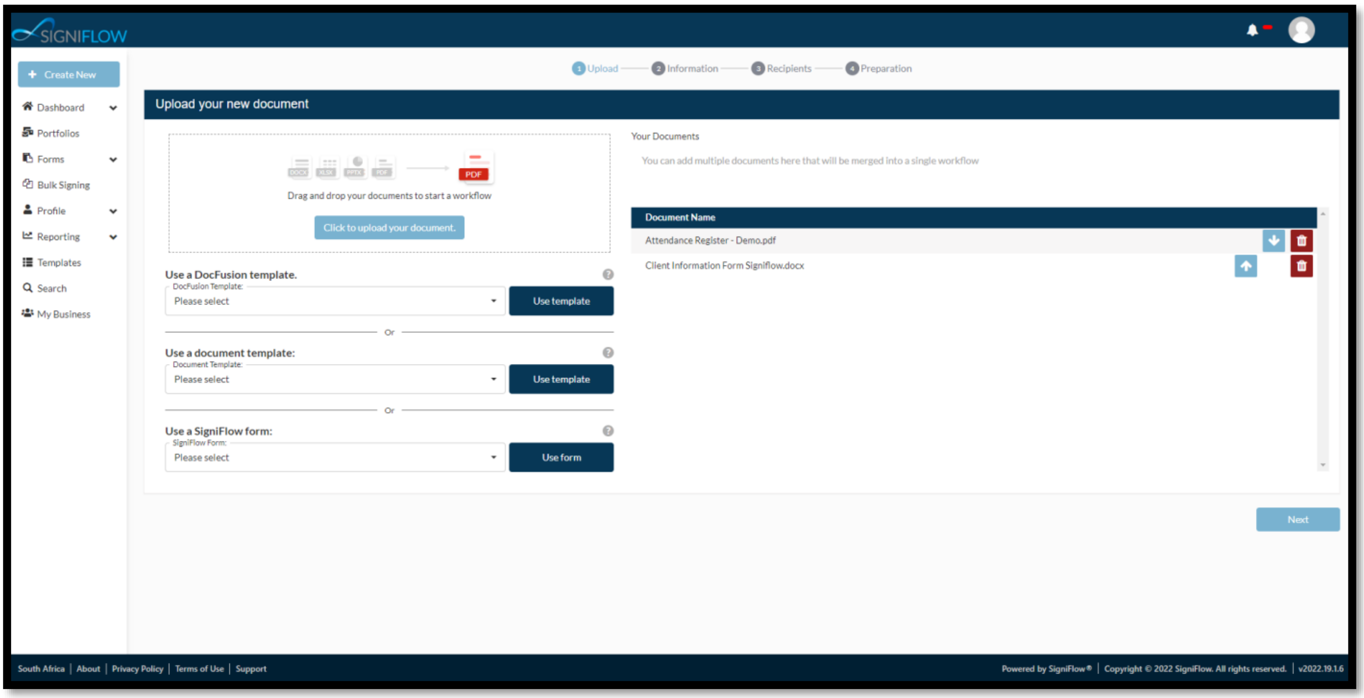
New Design



NEW FEATURES / ENHANCEMENTS (FRONT END)

- New progress indicator:
  - A fourth step indicator – 'Preparation' - was added to enhance progress view of where a user is during the creation of a new workflow.
- Drag-and-drop area was enhanced:
  - Better mobile responsiveness.
  - 'Click to upload your document(s)' button can now be used to add multiple documents from your local document folders on your hard drive, or from linked folders on your network drive(s) to add the documents one by one to the workflow.
- Use DocFusion template:
  - This is only visible to users with an active DocFusion for SigniFlow connector and license.
  - The dropdown menu will display all DocFusion templates linked to the user's SigniFlow account.
  - A user can add one DocFusion template to a SigniFlow workflow.
  - Once the template is selected, a form will appear, requesting that the user complete the dynamic fields drawn from the DocFusion template.
  - By completing and submitting the form, the data captured in the form will automatically be merged with the document as per the DocFusion configurations for that document.
- Use a document template:
  - Visible to all users.
  - The dropdown menu will display only the documents that are available to the user from the SigniFlow template library.
  - Access to documents saved in the SigniFlow template library is configured by the system administrator.
  - A user can add one, or multiple template documents to a single workflow
  - Once a template is selected from the dropdown, choose 'Use template'. To add a second document, select another document from the template library and choose 'Use Template'
  - Repeat until done.
- Use a SigniFlow Form:
  - Visible to all users.
  - The dropdown menu will display only the forms that are available to the user from the forms library.
  - Access to forms saved in the SigniFlow forms library is configured by the system administrator, or by the forms administrator.
  - Once a form is selected, the user will be redirected to the 'View Form' interface, where the form can be completed and submitted to workflow.
- Ability to upload multiple documents in a single workflow:
  - A new 'Your Documents' section has been added to the screen. This section is visible either to the right of the upload section (large screen size), or underneath the upload section (smaller screen sizes and mobile screens).
  - Multiple documents or document templates can be added to a workflow. These documents must be added one-by-one and will be chronologically displayed in the 'Your Documents' section, as indicated below.
  - A user can change the sequence of the documents before they are merged into a single document by choosing the light blue up and down arrows.
  - The system will automatically assume the name of the document on top, as the collective name of the document(s) uploaded. This can be edited on the screen that follows.
  - A document can be deleted from the workflow by choosing the red dustbin button next to the document name.

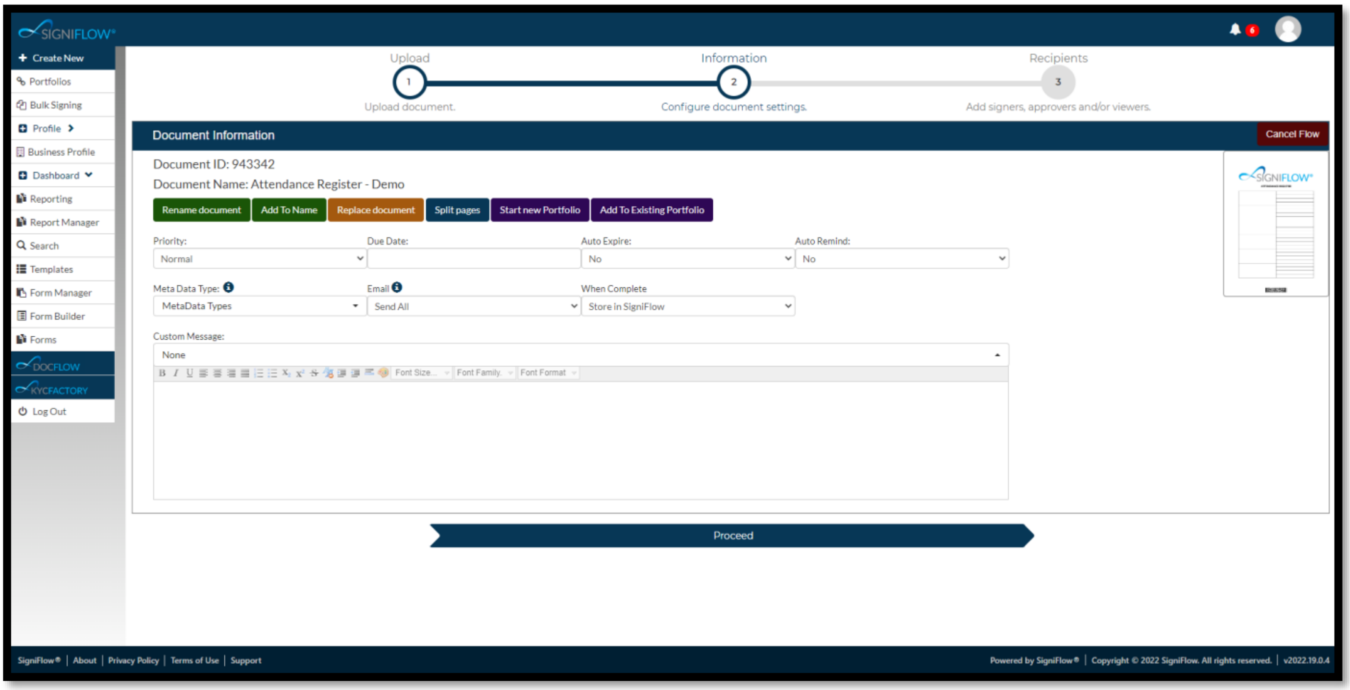
- Once the document(s) is uploaded, choose the 'Next' button to proceed to the next screen.



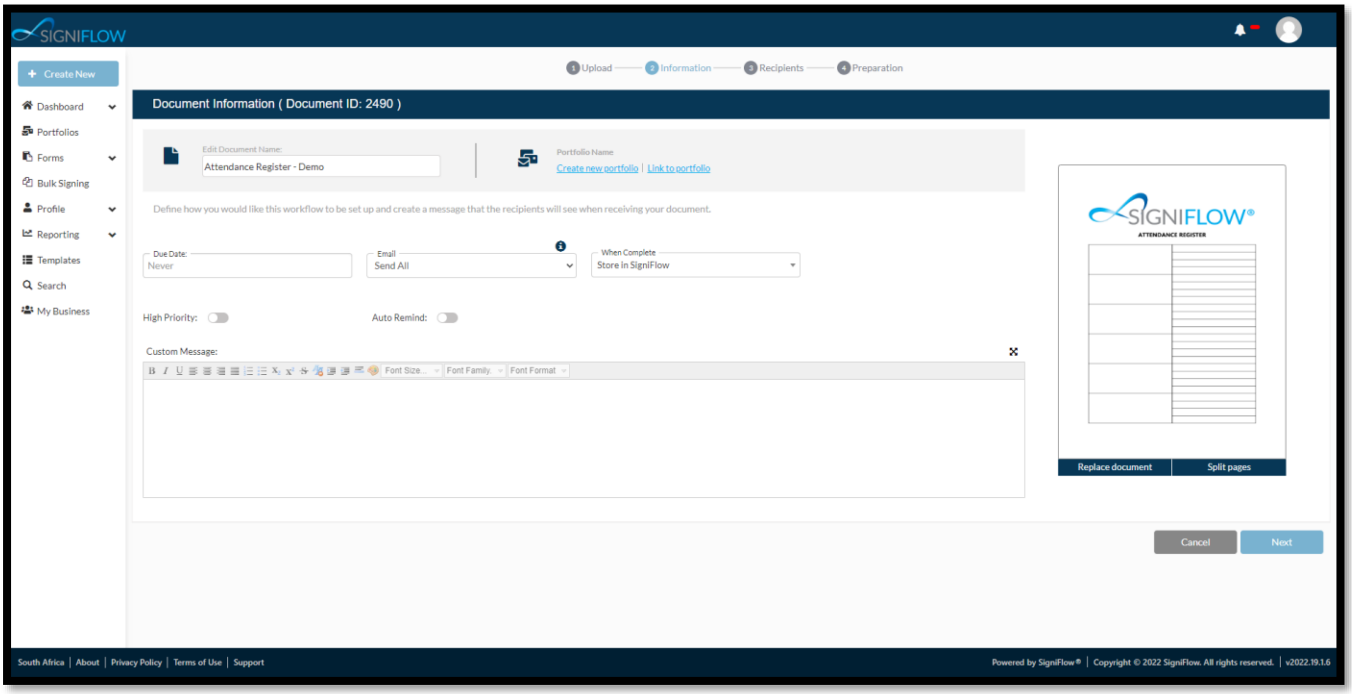
NEW FEATURES / ENHANCEMENTS (SYSTEM FRONT END)

New Document Information User Interface

Old Design



New Design



Edit Document Name:

- Users can now edit the name of the document by simply clicking in the text box and renaming or editing the name.
- The system will automatically save the name in the text field when proceeding to the next step.
- If parts – or all the document name – is not editable, it means the systems administrator is prohibiting certain changes.

Portfolio Name

- Create new portfolio:
    - By choosing 'Create new portfolio', a modal will pop up where the user needs to enter a name for the new portfolio, then choose 'Create Portfolio' to save the new portfolio name, or choose 'Close' to close the modal and stop creating a new portfolio.
    - The document(s) uploaded will form the first document in the newly created portfolio and will be available after the workflow has been released in the Portfolio section.
- Link to portfolio:
    - By choosing 'Link to portfolio', a modal will pop up where the user can choose an existing portfolio to link the uploaded document to.
    - To link the document to a portfolio, choose 'Link'.
    - A 'Success' message will appear, choose 'Close' to dismiss.
- Due Date:
    - Choose a date from the date picker which will appear when a user clicks in the Due Date text box.
    - The selected date will be sent to the recipient(s) as a calendar invite in the notification email.
    - If a date picker is not available, then the 'Enable Expire Period Lists' is enabled by the system administrator.
- Email (dropdown) – New style, no functional change from previous version:
    - 'Send All' (default) will send an email notification to all recipients in the workflow.
    - 'Skip All' will skip sending out an email notification to all recipients in the workflow.
    - 'Skip First' will only skip the first recipient in the workflow and send out notifications to all other recipients in the workflow.
- When Complete – New style, no functional change from previous version.
- High Priority:
    - This new function replaces the previous 'Priority' dropdown that had three options, Low, Normal and High.
    - Low priority is no longer an option.
    - The new toggle switch, switches between Normal Priority (default / off) and High Priority (on).
- Auto Remind:
    - This new function replaces the previous 'Auto Remind' dropdown that had two options, No (default) and Yes.
    - The new toggle switch, switches between the Auto Reminder being off (default) or on.
    - If on, the recipient(s) will receive an email notification every 24 hours to remind them to take action.
- Custom message:
    - The symbol to the right of the message box, has been added to maximise the message box size to accommodate ease of writing longer messages.
    - All previous version message settings were preserved.
- New thumbnail viewer:
    - The thumbnail viewer was enlarged so users can easily identify the first page of the document without having to click on the small thumbnail.
    - Users still have the ability to open a large modal to view the first page of the document, by clicking anywhere in the thumbnail.
- Replace document (dark blue button, directly underneath the thumbnail):
    - If the button is visible: It means the user is able to click and replace the document by uploading a replacement document.
    - If the button is not visible: It means the user is not able to replace the document with another document. This can be because:

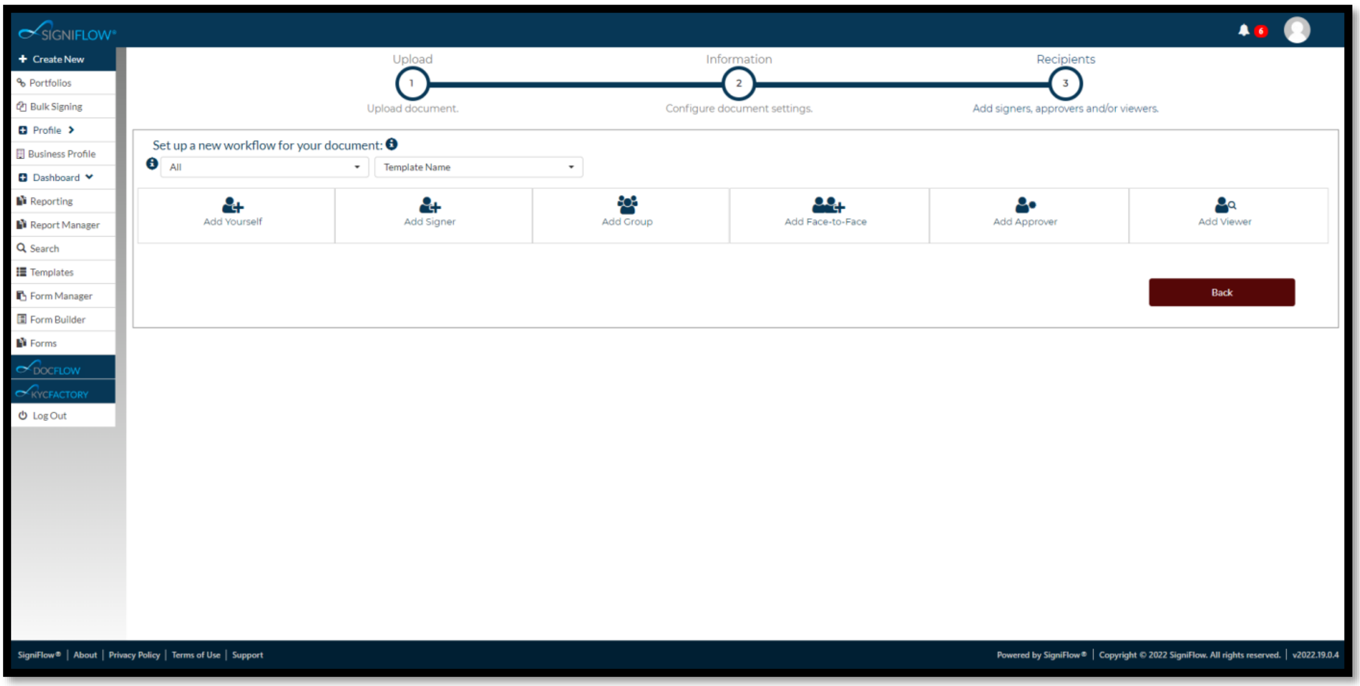
- The document is linked to a Portfolio – In this case, use the 'Unlink from Portfolio' function, then replace the document.
    - There were multiple documents uploaded – In this case, to replace the documents, the workflow needs to be cancelled and restarted.
  - Please note:
    - If the user used Templates, then a replacement template cannot be uploaded from here. For the user to replace a template, they need to cancel the workflow by choosing 'Cancel' and restart the workflow creation.
- Split Pages (Button directly underneath the thumbnail viewer):
  - New style, no functional changes from the previous version.
- Cancel button:
  - If the button is visible: The user can click to cancel the workflow.
  - If the button is not visible: The document is linked to a Portfolio, the user first needs to use the 'Unlink from Portfolio' function and once unlinked, choose 'Cancel'.

The large 'Proceed' button has been replaced by a light blue 'Next' button. This button will save the current configuration and proceed to the next screen.

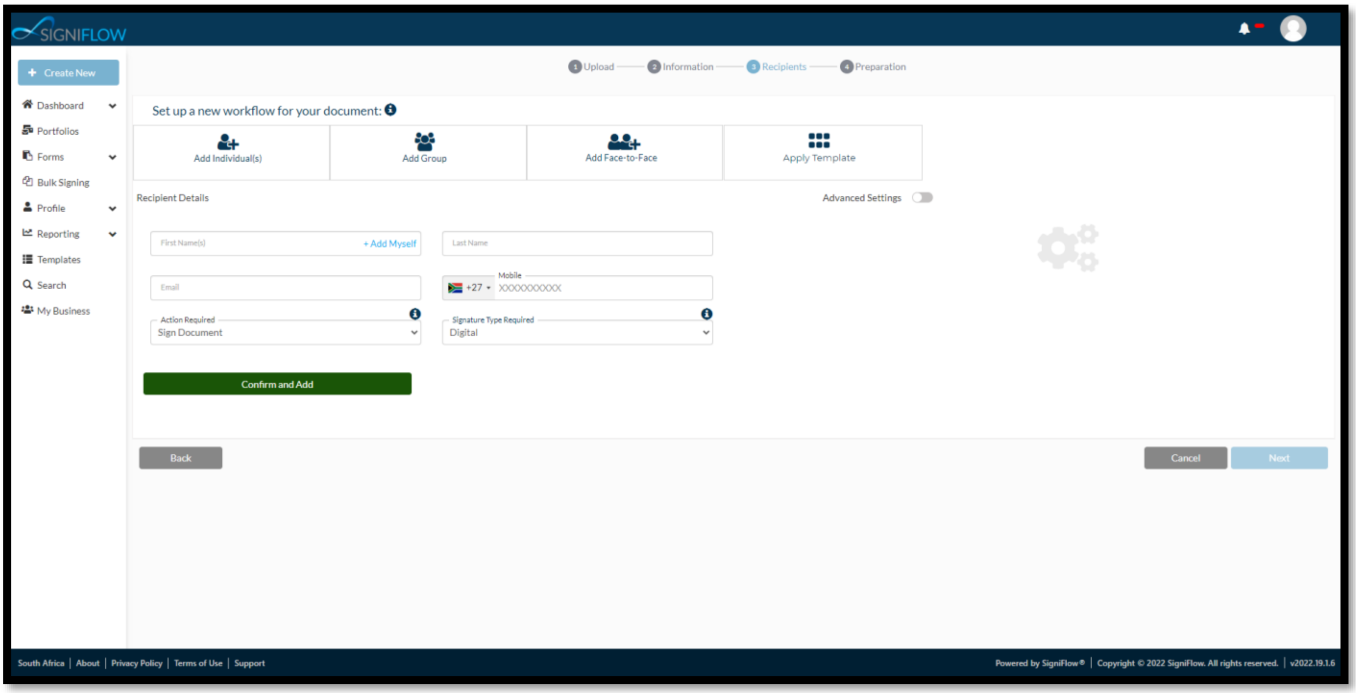
NEW FEATURES / ENHANCEMENTS (FRONT END)

New setup workflow screen

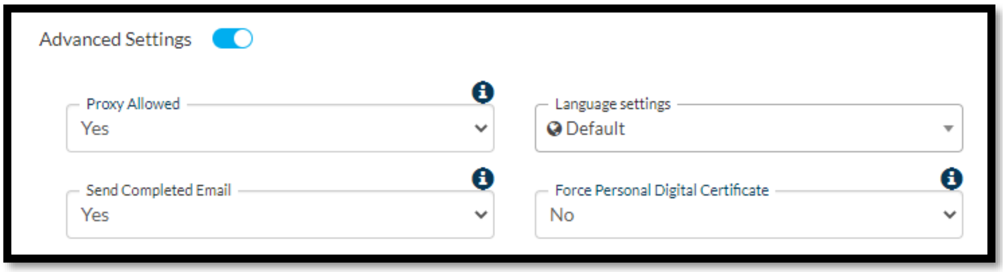
Old Design



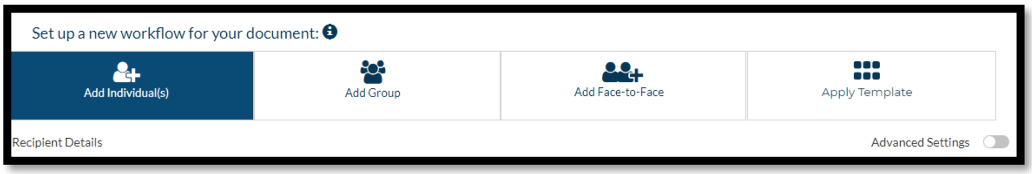
New Design



Advanced Setting can be set if required

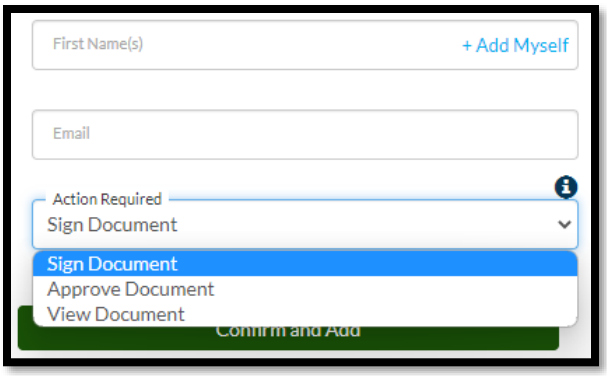


- New setup workflow for your document:

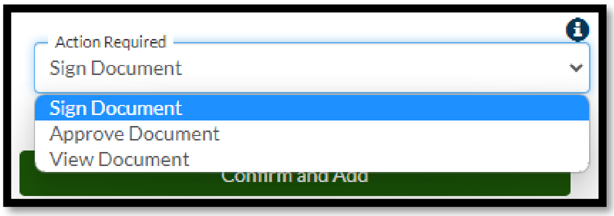


- The function blocks have been redesigned and reduced in accordance with features most used. Enhancements include:
  - 'Add Yourself' block removed.
    - To add yourself, click on 'Add Myself' in the 'First Name' text field.
  - 'Add Signer' block removed.
    - To add a signer, the user can simply start typing the recipient's name in the 'First name' field. If the recipient exists in the user's contacts, their name will appear. Simply click on their name to insert all their details. If the recipient does not exist, enter their First name, Last name, and email address (minimum requirements).
  - 'Add Approver' block removed.
    - To add a recipient as an approver, choose 'Approve Document' from the Actions Required dropdown.

    - All the user's details will automatically load.



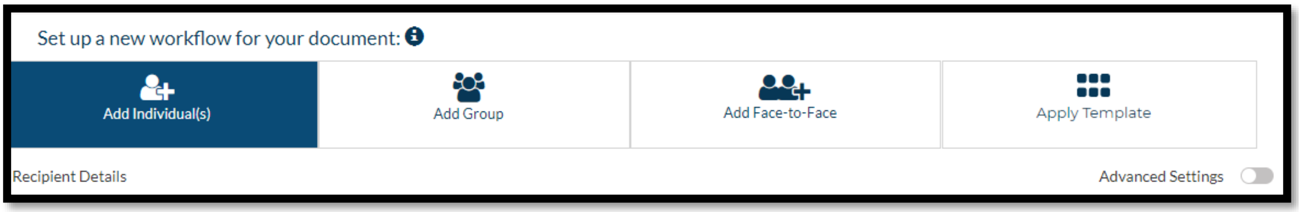
  - Add Viewer block removed:
    - To add a recipient as a viewer, choose 'View Document' from the Actions Required dropdown.



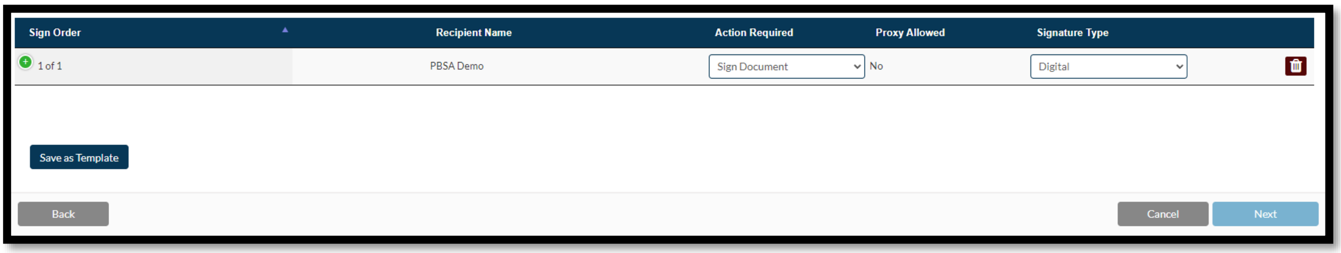
  - Apply Template block added:
    - Choose to apply a predefined, saved workflow template.
    - The newly enhanced dropdown will sort the saved templates under 'Personal' and 'Business'.

        - To apply the template, simply click on it. The system will automatically load the template. Click 'Load' to confirm if correct, or 'Cancel' to cancel loading a template.

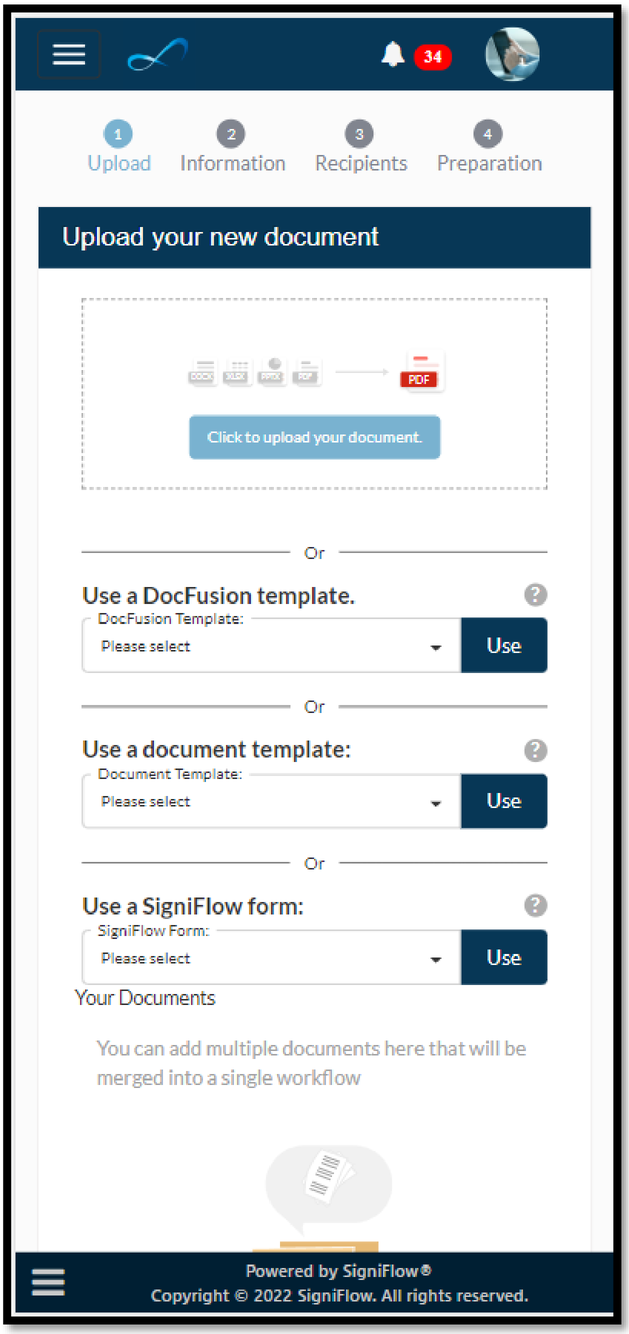
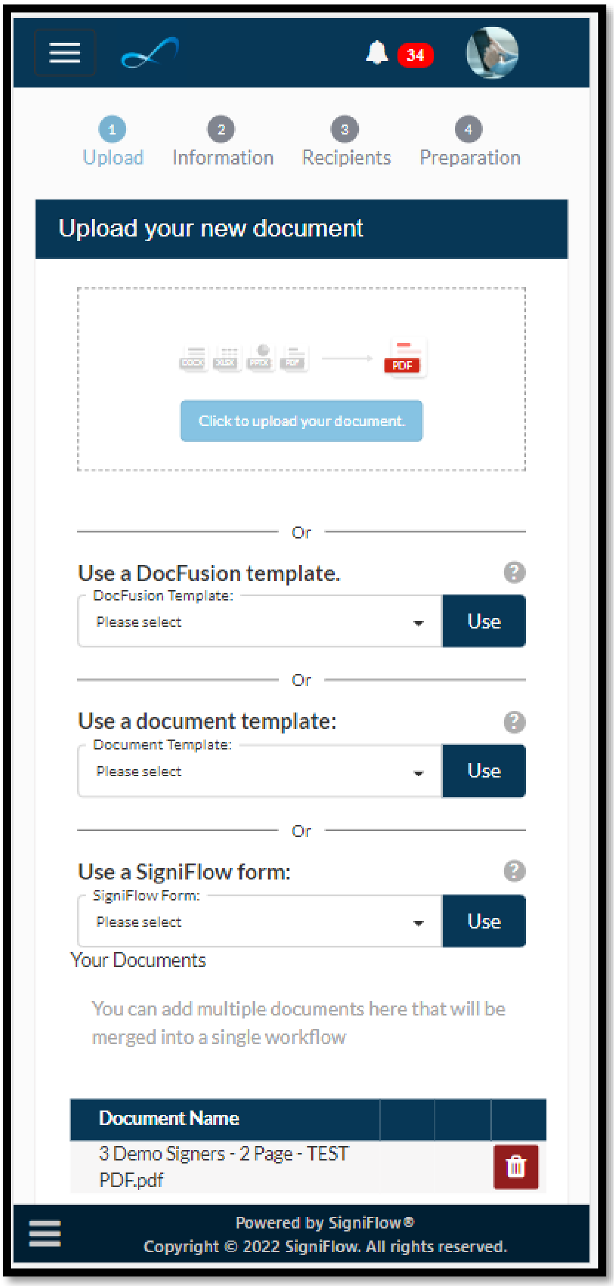
- Advanced Settings

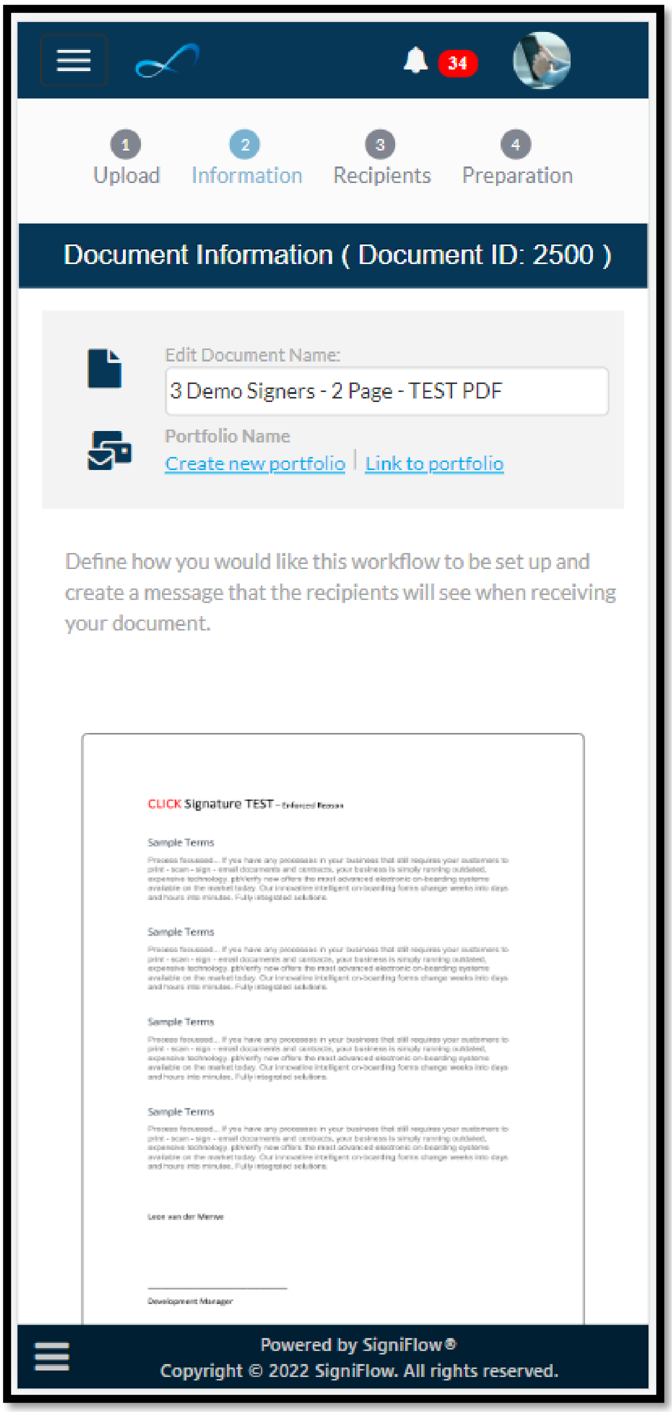


- To improve user experience, some functions are now hidden behind the 'Advanced Settings' toggle switch:
    - These functions are (may vary, depending on Business Administration settings):
        - Proxy Allowed
        - Send Completed Email
        - Language Settings
        - Force Personal Digital certificate
        - FaceSign
    - To display these functions, toggle the switch on.
    - To hide these functions, toggle the switch off.
    - The last used setting will automatically be saved.
- Signature Type Required
    - Choose between Digital or Electronic Signatures.
- Confirm and Add button:
    - Once a recipient is loaded and their settings are configured, the user needs to choose 'Confirm and Add' to add the recipient to the workflow.
    - **Note: Actions Required (Sign Document, Approve Document and View Document), Proxy Allowed and Signature Type (Digital or Electronic)** can be set after 'Confirm and Add' button in the Sign Order section that appears after a recipient is added.
- 'Reset' and 'Collapse' buttons were removed – redundant.



- 'Save Template' button: will only appear after at least one recipient has been loaded in the workflow.
- 'Back' and 'Cancel' buttons are now grey and repositioned for a better user experience.
- 'Go to DocPrepper' button has been replaced by the light blue 'Next' button and moved to the bottom right-hand side of the screen for a better user experience.

NEW FEATURES / ENHANCEMENTS (SYSTEM FRONT-END)	
- Better mobile and small screen responsiveness. - All the screens discussed in this document were redesigned for a better user experience on both large and smaller or mobile screens.	
	


34
1 Upload
2 Information
3 Recipients
4 Preparation
Document Information (Document ID: 2500)
Edit Document Name:
3 Demo Signers - 2 Page - TEST PDF
Portfolio Name
Create new portfolio | Link to portfolio
Define how you would like this workflow to be set up and create a message that the recipients will see when receiving your document.
CLICK Signature TEST
Sample Terms
Sample Terms
Sample Terms
Sample Terms
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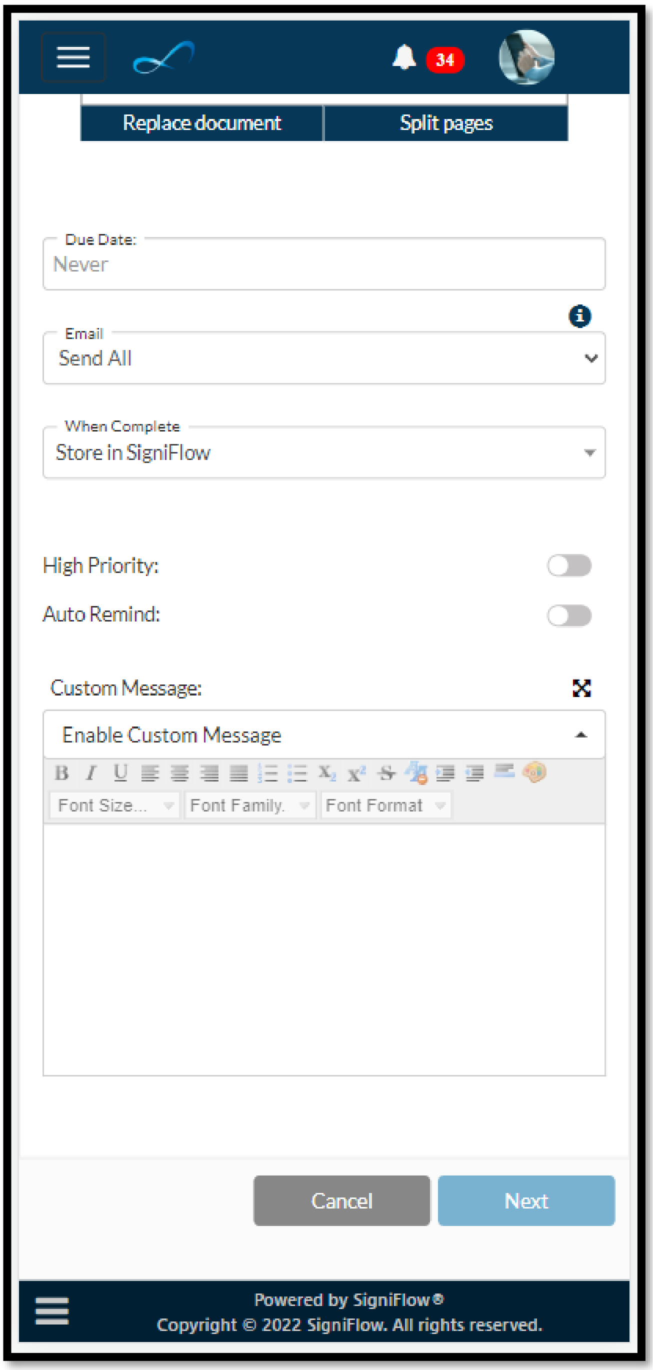
34
Replace document
Split pages
Due Date:
Never
Email
Send All
When Complete
Store in SigniFlow
High Priority:
Auto Remind:
Custom Message:
Enable Custom Message
Font Size...
Font Family.
Font Format
Cancel
Next
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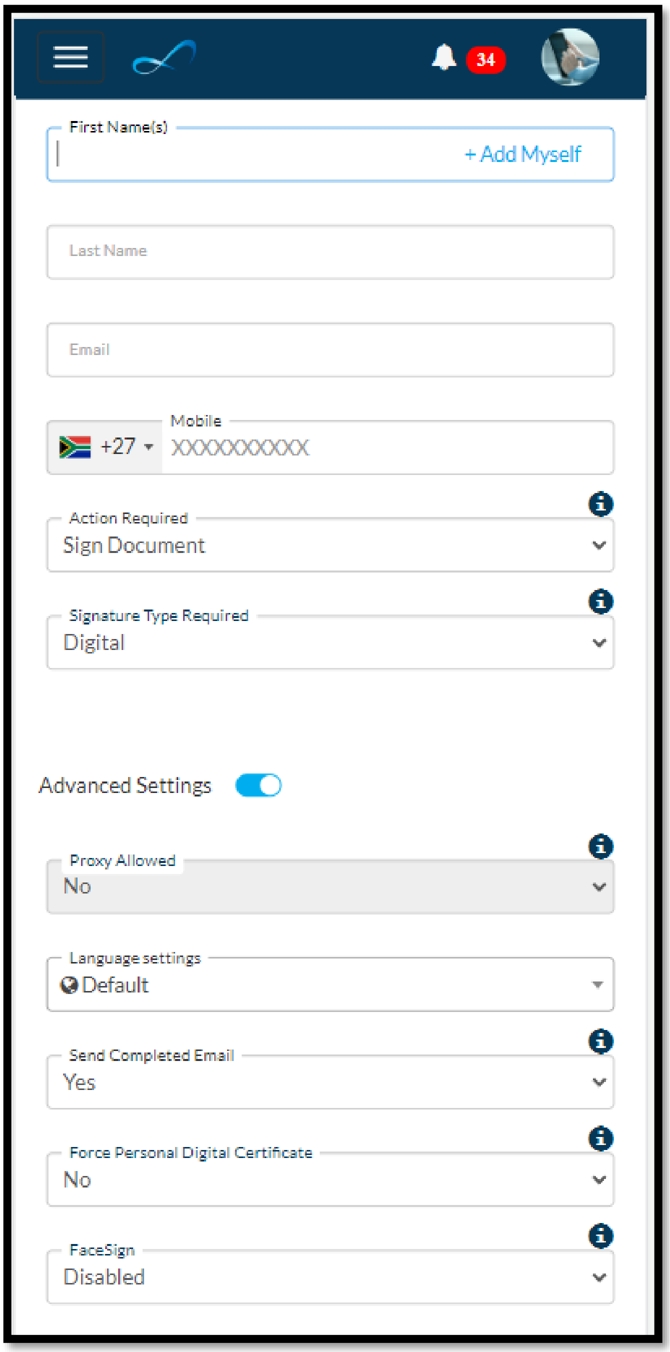

34
First Name(s)
+ Add Myself
Last Name
Email
Mobile
+27
XXXXXXXXXX
Action Required
Sign Document
Signature Type Required
Digital
Advanced Settings
Proxy Allowed
No
Language settings
Default
Send Completed Email
Yes
Force Personal Digital Certificate
No
FaceSign
Disabled

NEW FEATURES / ENHANCEMENTS (SYSTEM FRONT END)

- New Portfolio Template feature (BETA version – Must start with a form).
  - Note – It is possible to start a template from a document (not a form), however this will require training. Please contact your account manager or log a ticket with support [here](#).

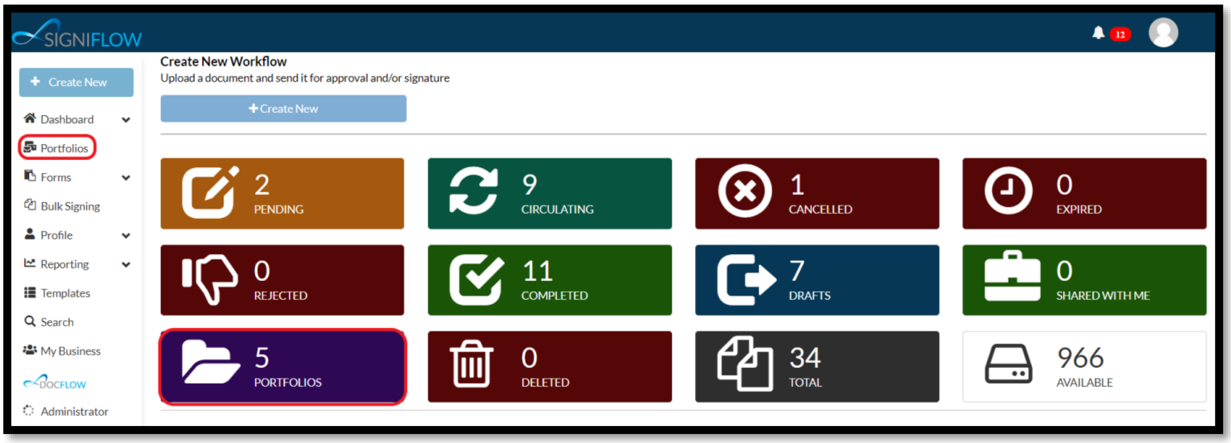
SigniFlow® has added a new feature to Portfolios, in addition to the standard functionality. Users can now create and re-use portfolio templates.

Before setting up a portfolio template, you need to have created the following:

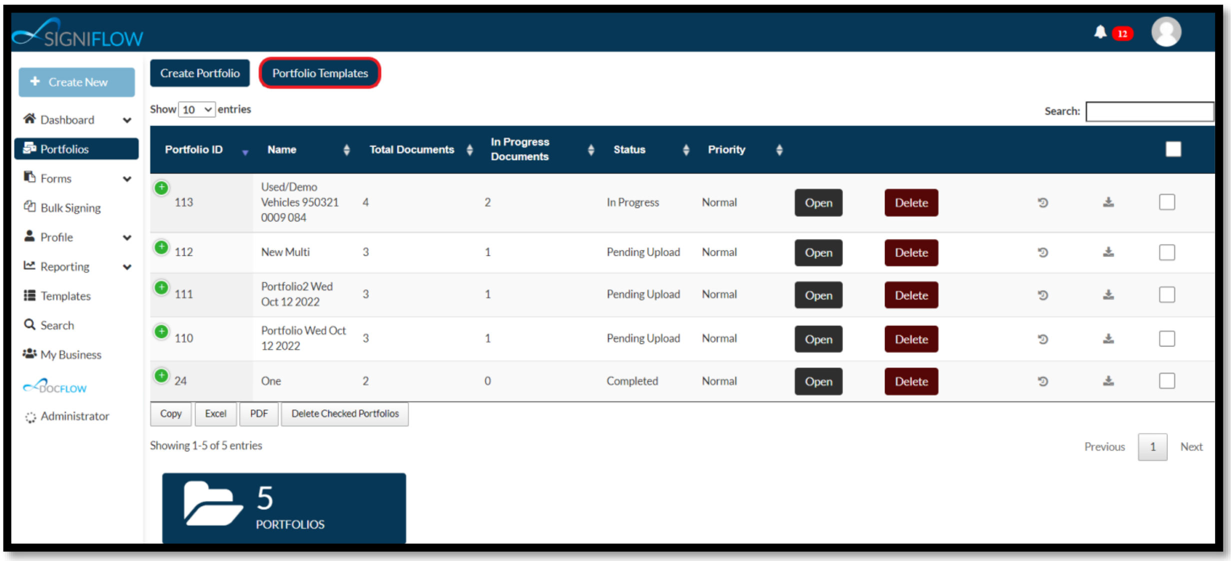
- A created form
- A workflow template
- A DocPrepper template

To create a portfolio template:

Go to the Portfolios basket from your dashboard, or access Portfolios from the left-hand menu.

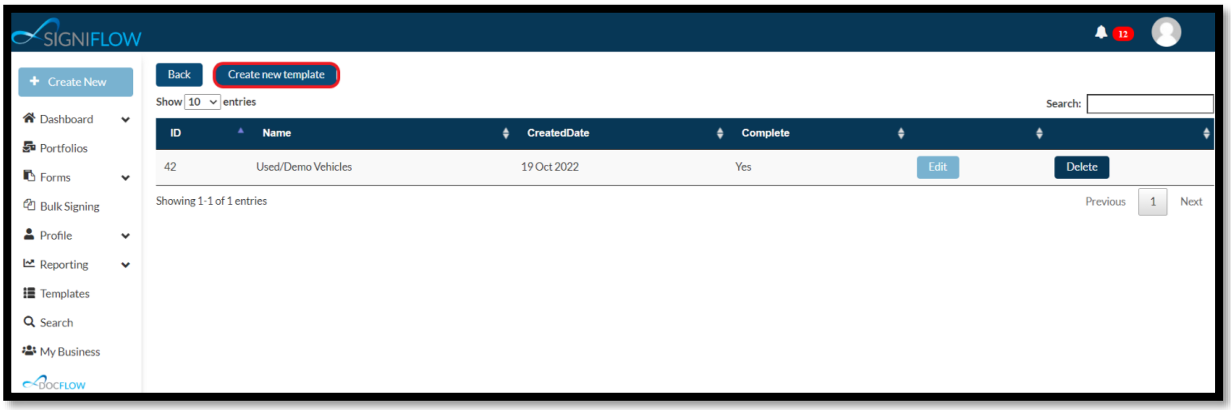


Click on ‘Portfolio Templates’.



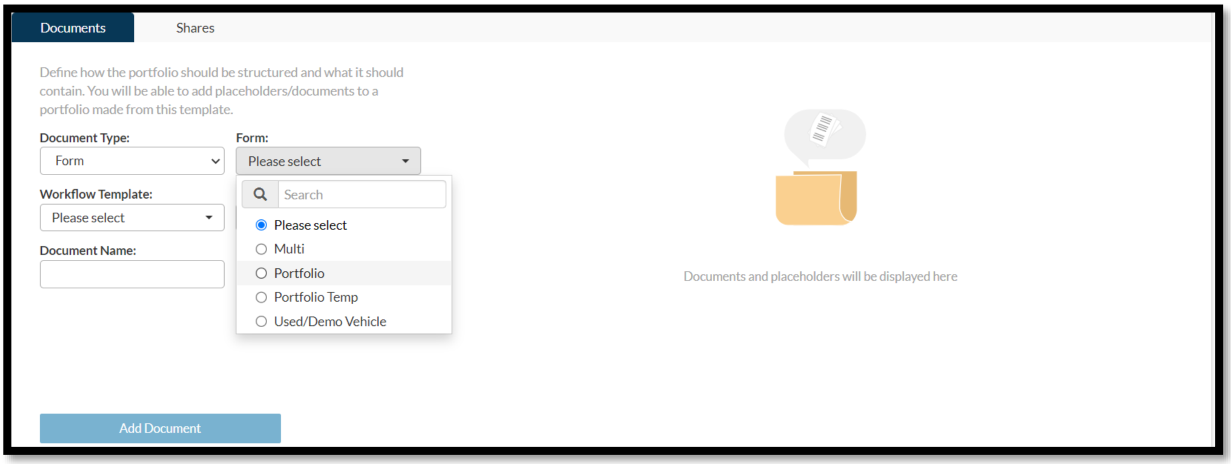
In Portfolio Templates, you can create a new template, edit and delete your existing templates.

Click on 'Create new template'.

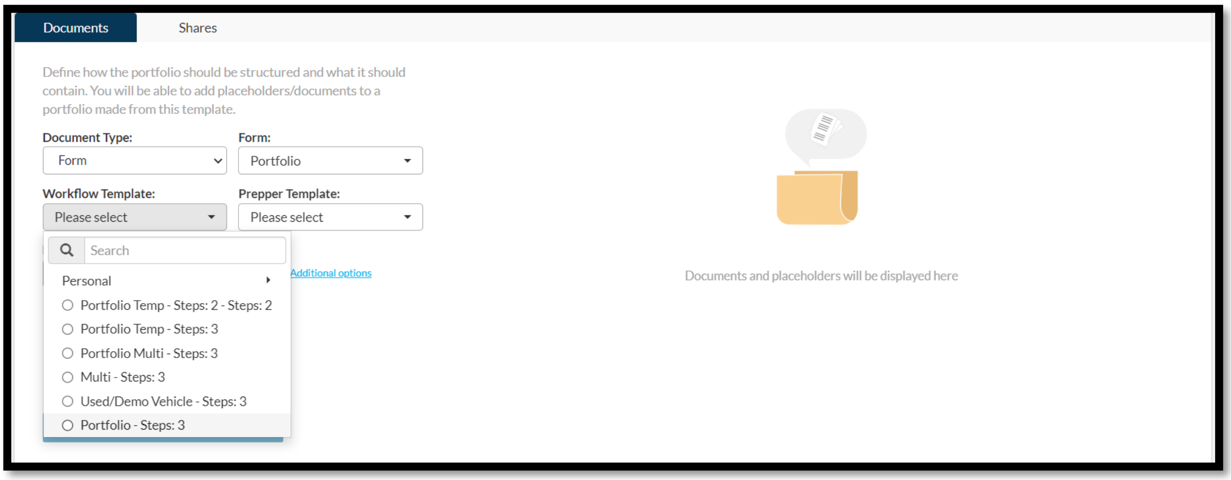


On the screen that follows, give your template a name.

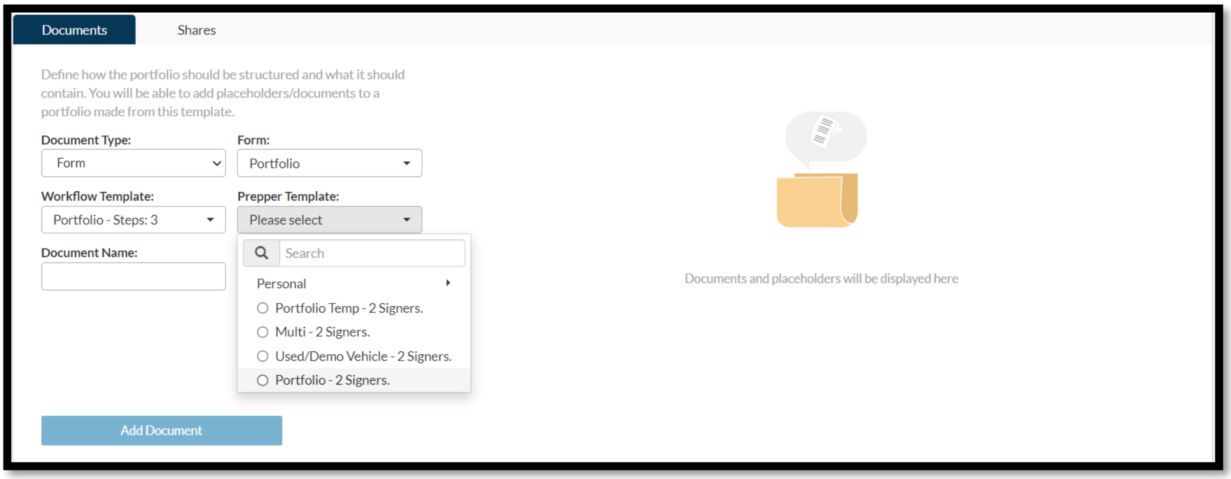
Select a Form.



Select a Workflow Template.



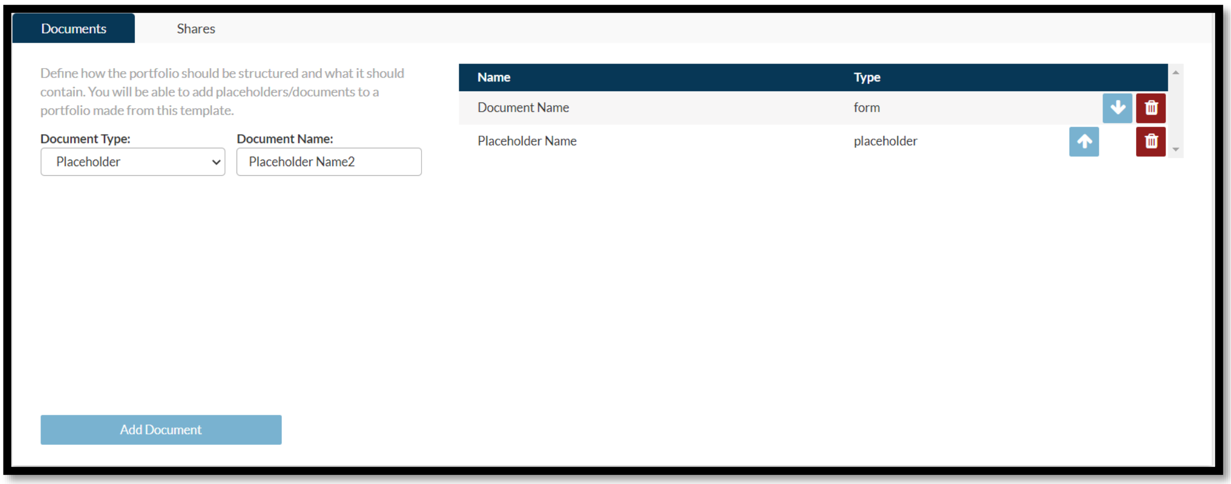
Select a DocPrepper Template.



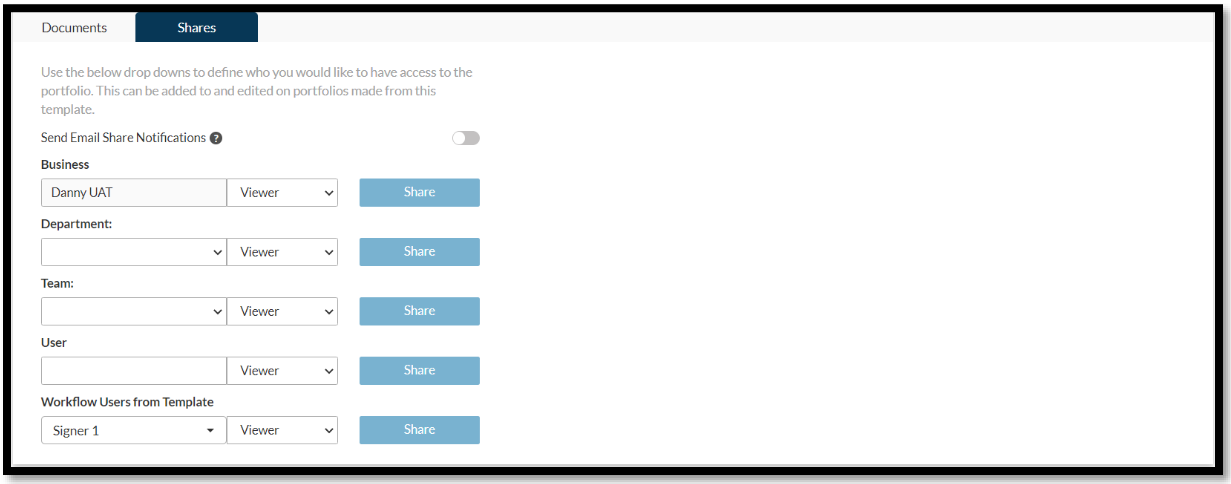
Give your Document a Name and click on 'Add Document'.

Add Some Placeholders to your portfolio and name them.

Every time you would like to add a placeholder to your portfolio, name your placeholder and click on 'Add Document'.

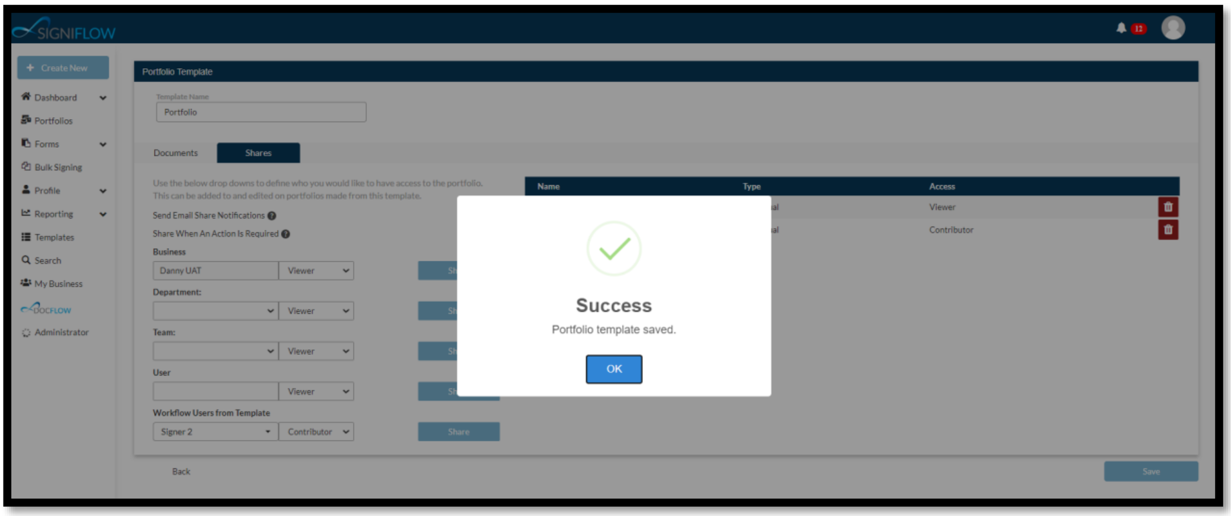


Once all the placeholders have been added to your portfolio template, you can move on to sharing.



Select the users you would like to share your portfolio with and assign their access level. Then click on 'Share' alongside each unit or user.

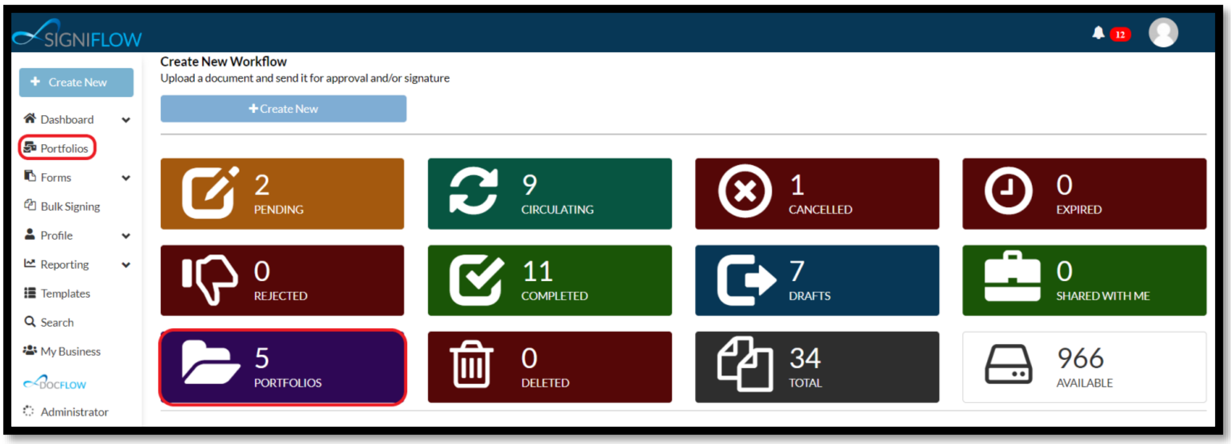
Once the shares have been set up, click on 'Save'.



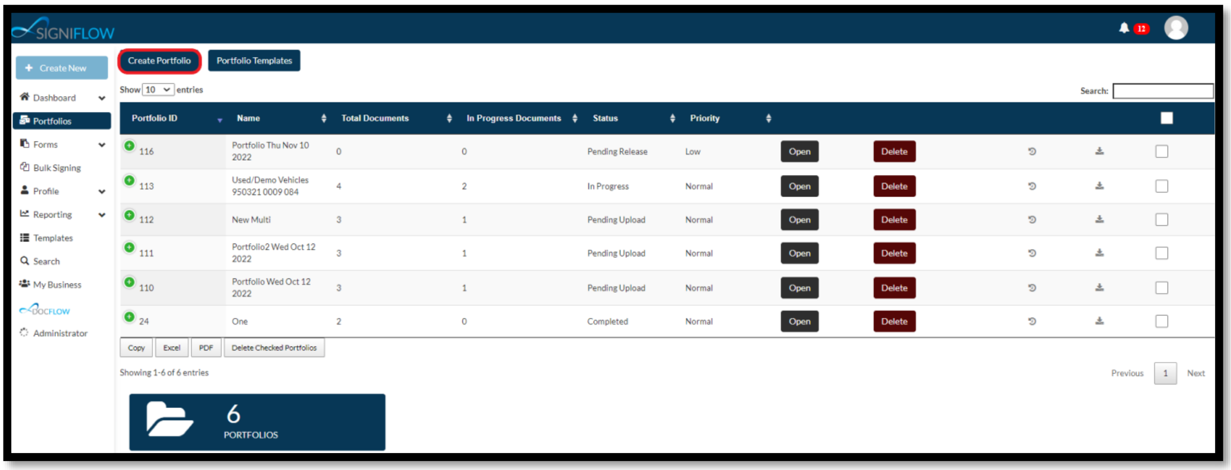
How to use Portfolio Templates

Now that your portfolio template has been created, use it by following the instructions below:

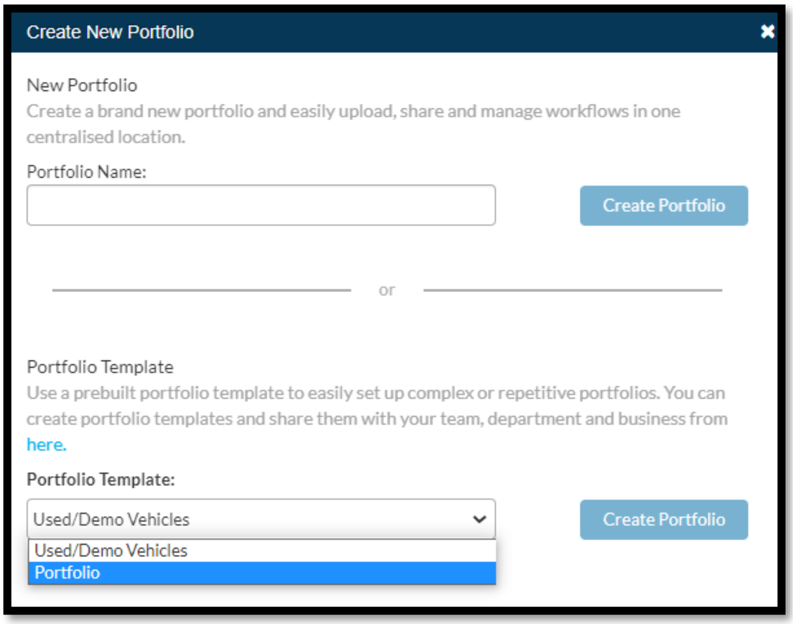
Go to the Portfolios basket on your dashboard, or access Portfolios from the left-hand menu.



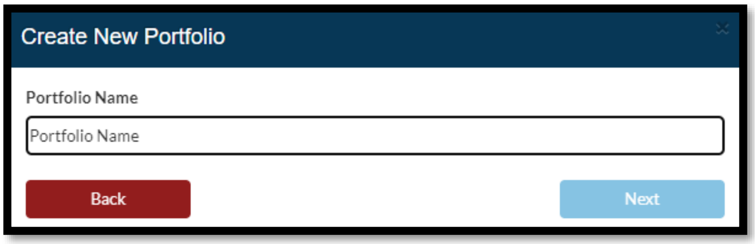
Click on ‘Create Portfolio’.



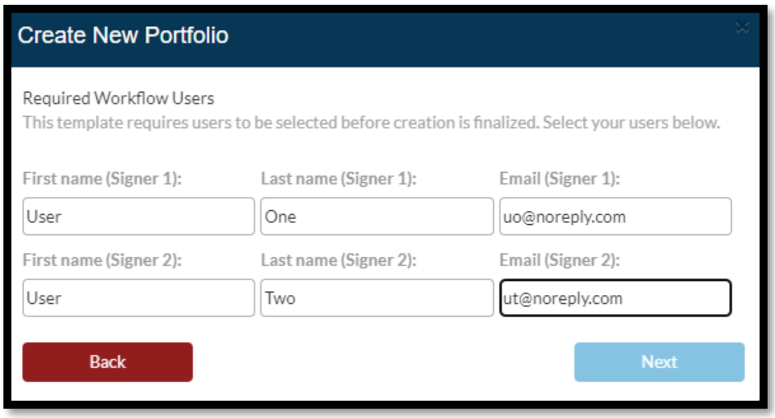
Select the Portfolio Template you would like to use, and then click on 'Create Portfolio'.



Name your portfolio and click on 'Next'.



Confirm or enter your required workflow users and click 'Next'.



Fill in the form and click 'Submit'.

Once the form has been submitted, your portfolio will be created.