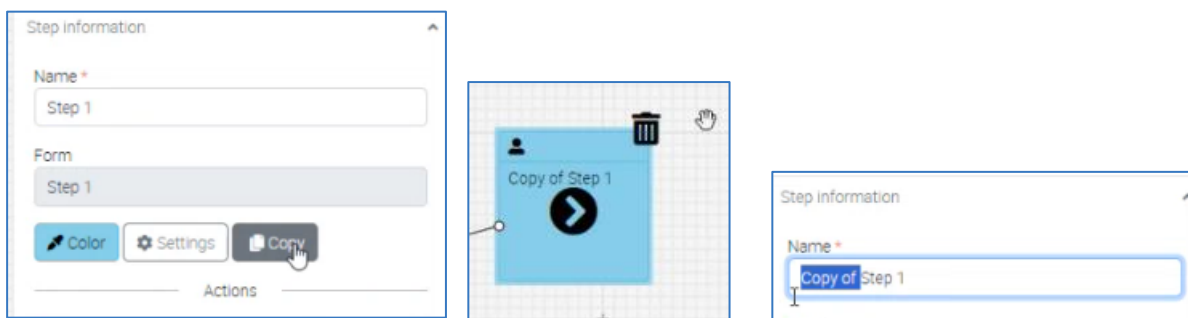


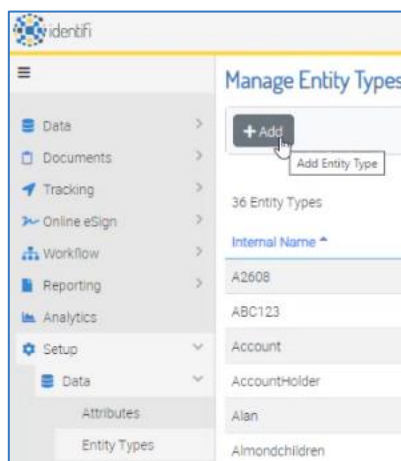
## What's New in Identifi 24.3 (Upgrading from 24.2)

### WORKFLOW

- **Copy a Step Within a Workflow**
  - Within the Designer Canvas, a User now has the ability to copy an existing Workflow step. This feature will copy all of the original step settings, including rules, and create a new version of the step, which can then be renamed. Settings within the new step can also be adjusted if needed under “Settings.”



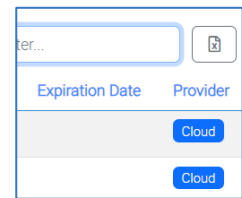
- **Workflow Admin Role Enhanced to allow for Entity creation.**
  - In previous versions, a User needed to have the full Administrator Role in order to create new Entities for Workflows. In 24.3, the Workflow Administrator will also be able to create Entities for Workflow creation.



## ONLINE ESIGN

- **Changes within the OLE Inbox:**

- With transition from On-Prem OLE into the SaaS completed, the **Provider Flag** indicator has been hidden within the Inbox.
- **Create Date** column, indicating when the package was created, has been added to Inbox and is an available option within OLE Package Search.



Sheila's Online eSign Inbox ?

New Package Archive

1 Item

Filter...

ID	Name	Recipients	Status	Profile	Create Date	Last Updated	Expiration Date
3994	Test Lockout	Test User	Sent	A Multi App	2/27/2024 2:17 PM	2/27/2024 2:18 PM	

identifi

Online eSign Package Search ?

Date Range:  Predefined  Custom

Current Month 9/1/2024 - 9/30/2024

Dates based on Last Package Activity Date.

Profiles: A Multi App, Accounts, Accounts - No KBA, Accounts - No KBA SMS Required, Alan

Date to Search on:

- Last Package Activity Date
- Last Package Activity Date
- Created Date**
- Statuses
- Batch Creation Error
- Completed
- Declined
- Declined Error
- Document Processing Error

- **KBA Unlock Feature Re-enabled**

- With the move from Equifax to LexisNexis, the ability to unlock a package, that used KBA as the two-factor authentication method, was removed by the vendor; this has now been updated in their newest release and so once again a KBA package can be unlocked if a recipient fails to answer KBA questions correctly.
- The sender will get an email notification that the Package has been locked, and they can open the Package to unlock the recipient.
- Once unlocked, the displayed status returns to "Not Yet Attempted."

Recipients

+ Add  Enforce Signing Order

Pending

Tricia2

Title

Resend

Authentication

Email

KBA **KBA**

Tricia

KBA **KBA Locked**

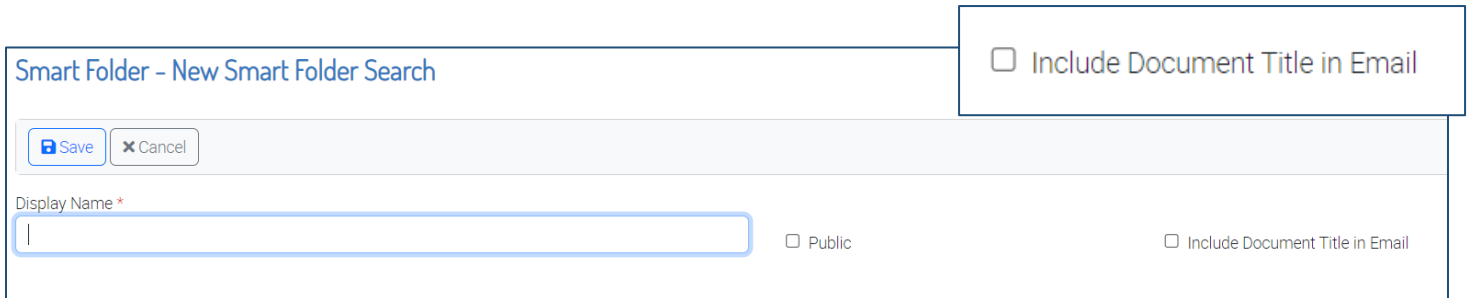
Unlock Signer

KBA **Not Yet Attempted**

Tricia

## SMART FOLDER EMAIL NOTIFICATIONS

When creating/editing a Smart Folder, there is now an option to **show or hide a document's title** within notification emails.

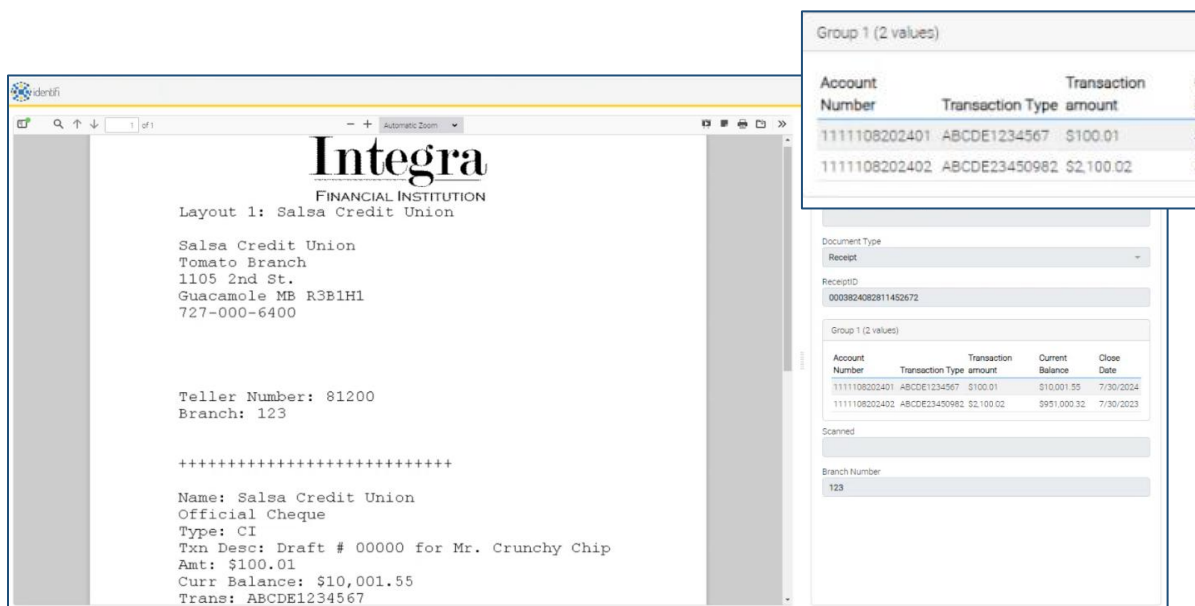


In 24.1, the **Display Name** had been replaced with **Document ID** within Smart Folder email notifications, as this could potentially contain sensitive information. Customer feedback indicated that at times, if no sensitive information is in the title, they would want the Display Name visible, so it is now optional based on the customer's needs for that Smart Folder. **Note:** *the default is to hide them.*

## ERECEIPT

**Multiple Transactions Supported** - Changes have been made to support multi-value transaction types on a single receipt.

- Attributes must be marked as Multi-Value and grouped properly
- No changes to the Receipt Designer, only the 1st value is highlighted
- Change to logic for Exclusions and signature prompt (if any rules are met, prompt for signature)
- Changes to logic for transaction type printing
- Added the ability to show multiple receipt transactions on a Verifast tablet.

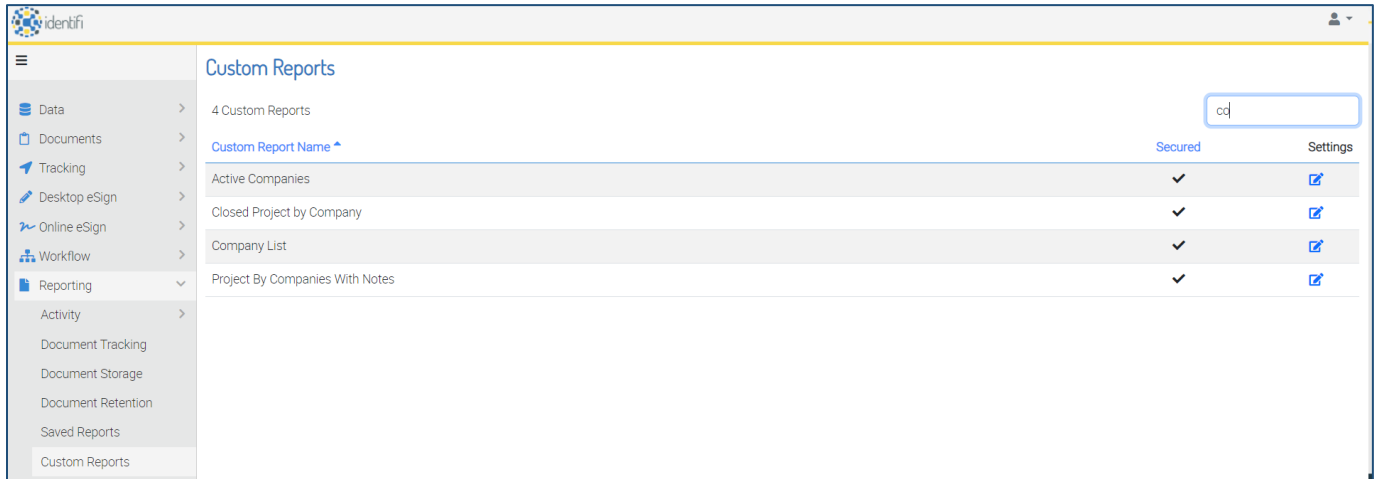


Group 1 (2 values)				
Account Number	Transaction Type	amount	Current Balance	Close Date
1111108202401	ABCDE1234567	\$100.01	\$10,001.55	7/30/2024
1111108202402	ABCDE23450982	\$2,100.02	\$951,000.32	7/30/2023

Document Type: Receipt  
 ReceiptID: 0003824082811452672  
 Branch Number: 123

## CUSTOM REPORTING SOLUTION

With the retirement of Izenda Analytics at the end of 2024, an integration with the Power BI Platform will allow customers who still have custom reports to view them in Identifi with a new menu item under Reporting called “Custom Reports.”



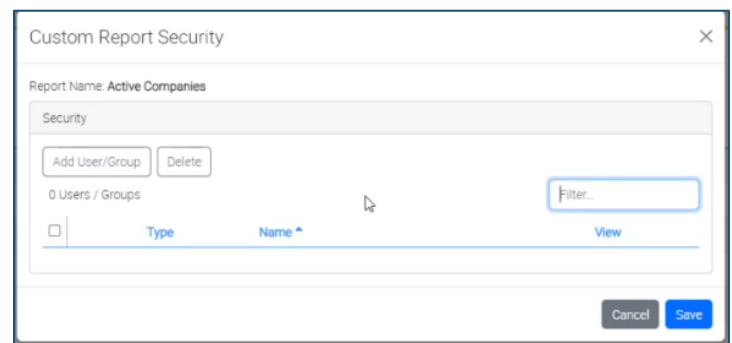
When the user selects the specific report from the report list, the system launches their Power BI workspace and displays that report directly in Identifi.



Security can be configured on Custom Reports using the Edit icon to the right of the report title.



**Note:** If no security is defined, users with the “Report User” Role will be able to view the report.



## OTHER NOTABLE CHANGES

- Optimize Identifi Subscribe to be more efficient
- Removed the additional “identifi.net” from the site URL
- Redis Cache Optimizations to be more efficient
- Refactored how we are getting the Retention Policy text, as it was impacting performance
- Rework the data caching for the Add Document API
- Added barcode format date mask to handle slashes

## Upcoming Highlights

### Changes Coming in Future Identifi Releases

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#### ANALYTICS PHASE OUT

We continue the efforts to phase out Analytics by focusing on custom reporting needs. This process will continue throughout the year as we continue to improve the in-product reporting features and provide customers with other ways to access the data they need to make their business decisions.