

Signature Block Override: Simplicity Runtime Training Support Guide for Document Library 2021.101

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About This Training Guide

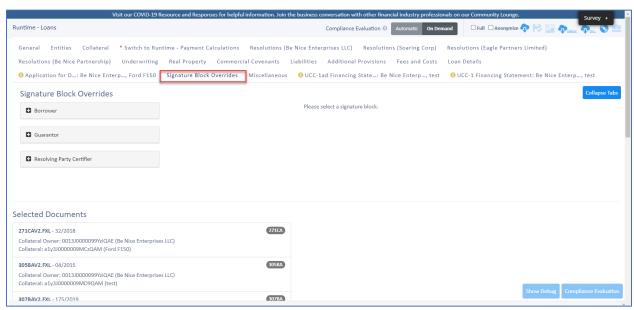
This training guide covers the Signature Block Override feature in Simplicity Runtime that lets you configure how a signature block for an entity should appear. The features outlined in this guide are available for users who are on the 20201.101 document library version or newer. If you are using document library 2020.359, please review *Signature Block Override Training Guide 2020.359* for an accurate description of available functionality.

For a complete description of the Signature Block Override Feature, please see the Release Notes for CHANGE-3689.



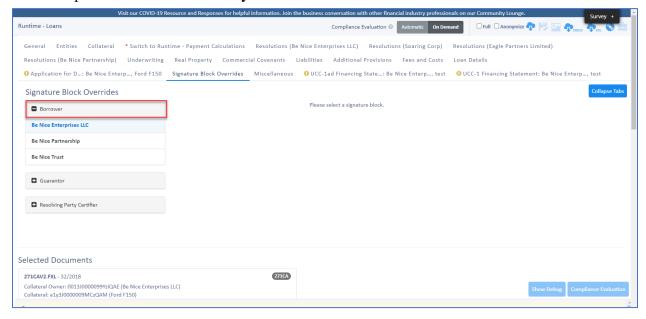
Invoking the Signature Block Override

1. To invoke the Signature Block Override Feature on Commercial Loans, click on the **Signature Block Overrides** tab in Simplicity Runtime.



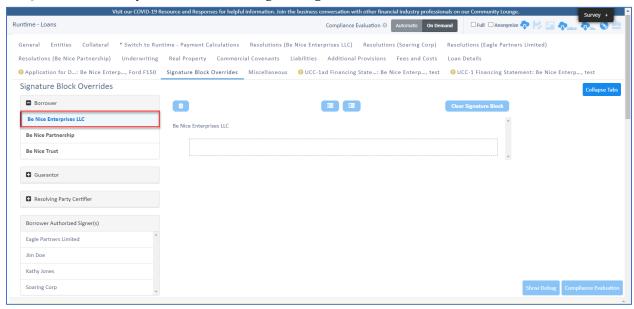
Signing structures may be configured for **Main Entities** of Borrower, Guarantor or Hypothecator.

2. Expand one of the **Main Entity** Sections.

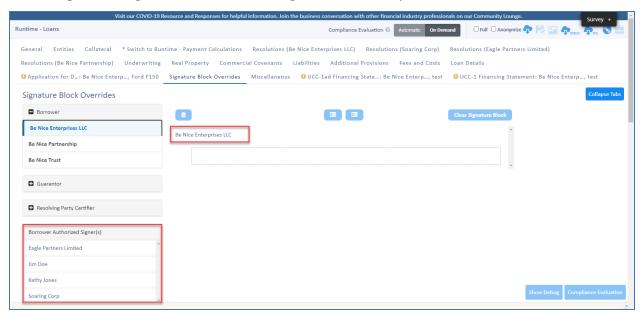




3. Select an entity from the list to configure a signature block.

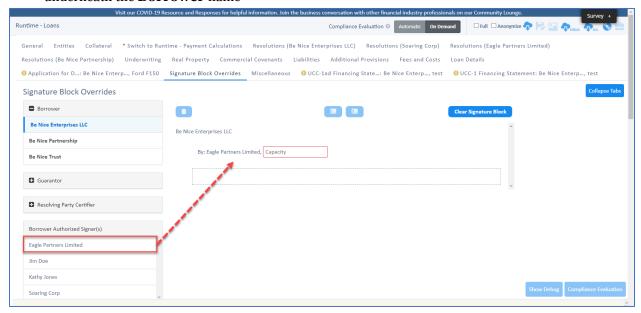


4. After you click on the **Entity Name**, the **Borrower Authorized Signer(s)** list will display all entities that have been assigned the **Role of Borrower Authorized Signer** and have been linked to the **Borrower**. The **Borrower** name will display on the right of the panel to visually represent a signature block will be configured for this entity.

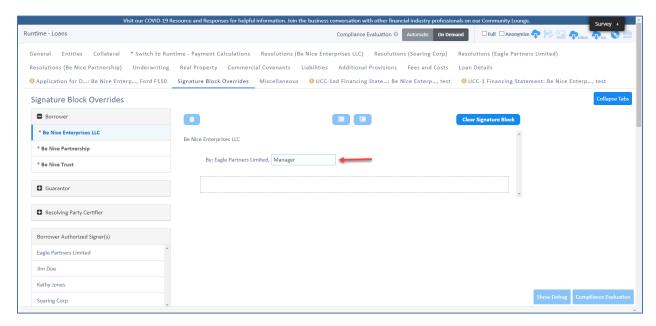




5. From the **Borrower Authorized Signer(s)** list, drag the entity who will be signing on behalf of the **Borrower**. The **Borrower Authorized Signer** will automatically be indented directly underneath the **Borrower** name

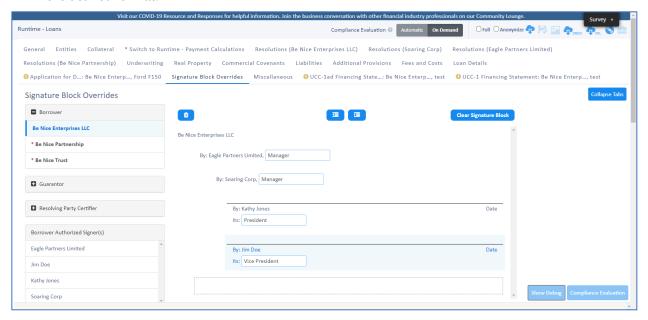


6. Enter the capacity description for the **Borrower Authorized Signer** in the *Capacity* field.

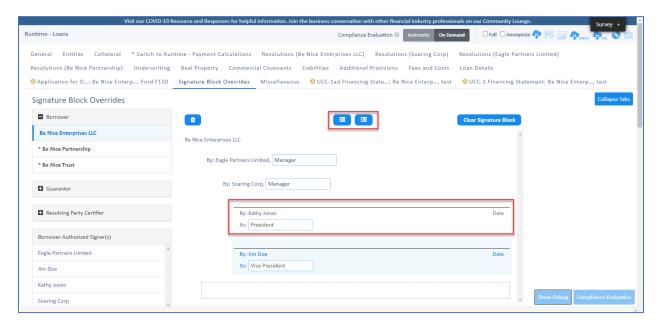




7. Continue to drag and drop the **Borrower Authorized Signer(s)** until the signature block is in the desired format.



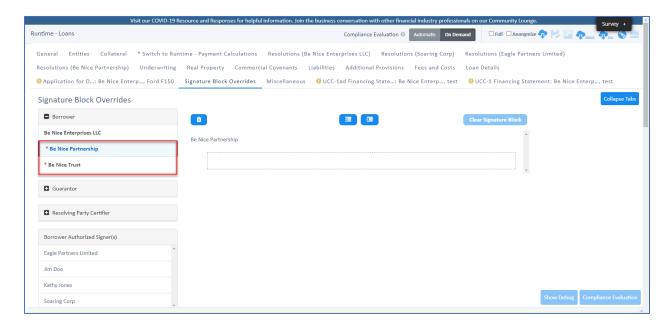
8. To indent a signing entity, highlight it and click on the *Right Indent* or *Left Indent* icon. The current maximum indent level is 7.



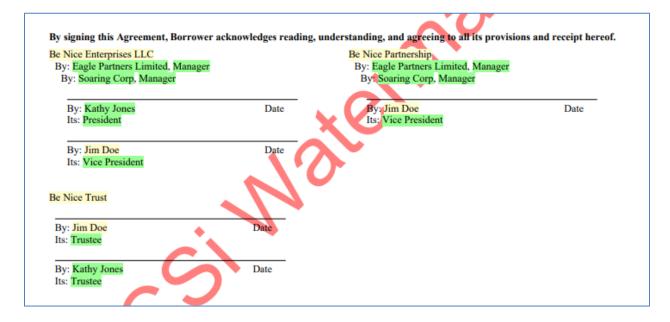
9. Continue to configure signature blocks for all remaining entities with the role of **Borrower**.



Note: If you configure a signature block for a Main Entity, any remaining Non-Individual Entities with that same role will require a signature block to be configured. This is indicated by a red asterisk to the left of the Entity Name.



10. When you have completed your signature block configuration for all required entities, you may preview your documents.

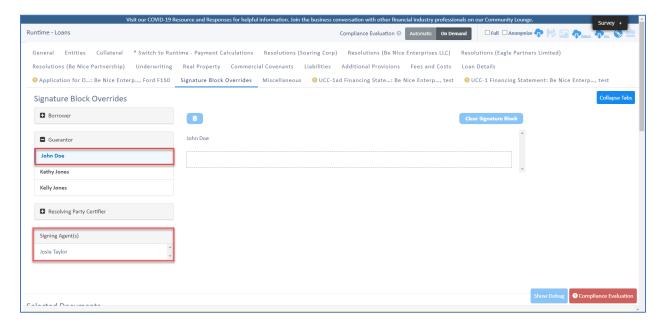




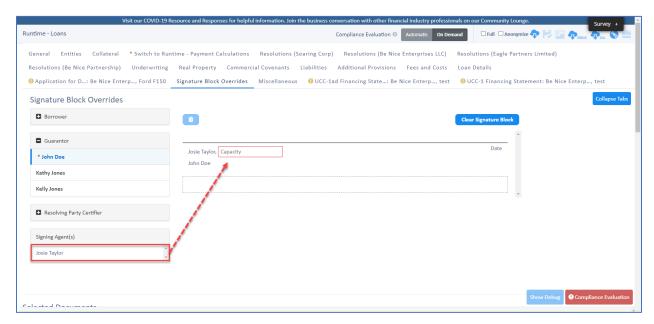
Configuring a Signing Agent Signature Block

An Individual Main Entity with a Signing Agent is supported in the Signature Block Override feature.

1. Click on an individual Main Entity. Entities that have been assigned the role of **Signing Agent** will appear in the **Signing Agent(s)** section.

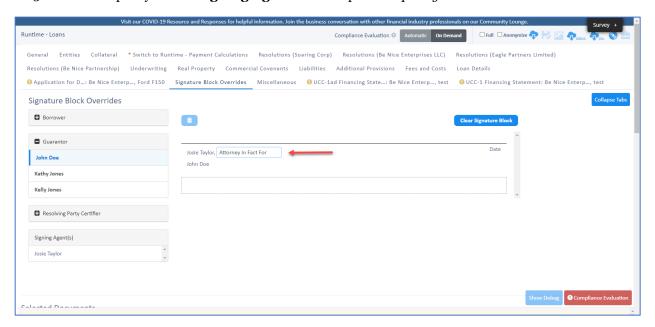


2. From the **Signing Agent(s)** list, drag the entity who will be signing on behalf of the **Guarantor**. The **Signing Agent** will automatically be indented directly underneath the **Guarantor** name.





3. Enter a capacity for the **Signing Agent** in the required *Capacity* field.



4. When you have completed your signature block configuration for all required entities, you may preview your documents.

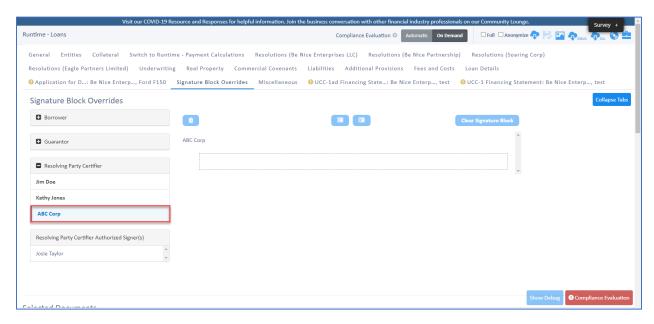
By signing this Guaranty, Guarantor acknowledges reading, understanding, and agreeing to all its provisions.	
Josie Taylor, Attorney In Fact For John Doe	Date



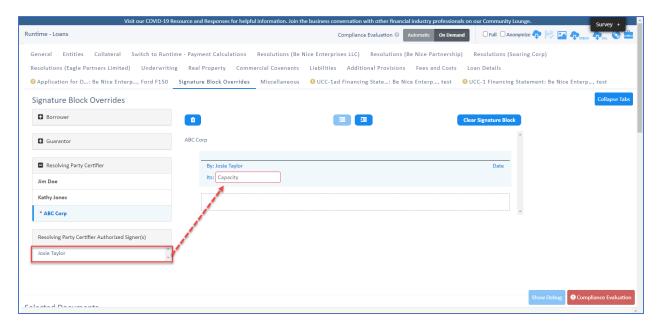
Resolving Party Certifier

Non-individual Resolving Party Certifier entities are supported in the Signature Block Override Feature.

1. Select on a non-individual **Resolving Party Certifier** from the list.

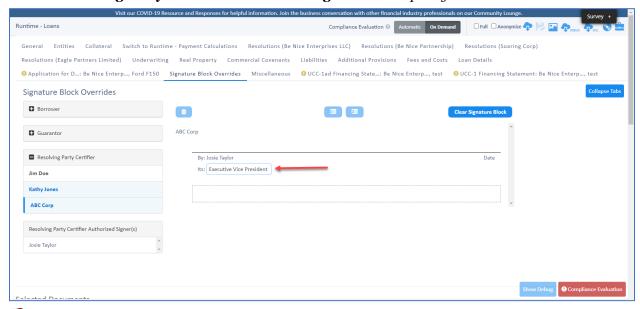


2. The **Resolving Party Certifier Authorized Signer(s)** list will appear with a list of entities who have been assigned the role of **Resolving Party Certifier Authorized Signer**. Select the **Resolving Party Authorized Signer** and drag to the right of the screen directly underneath the **Resolving Party Certifier**.



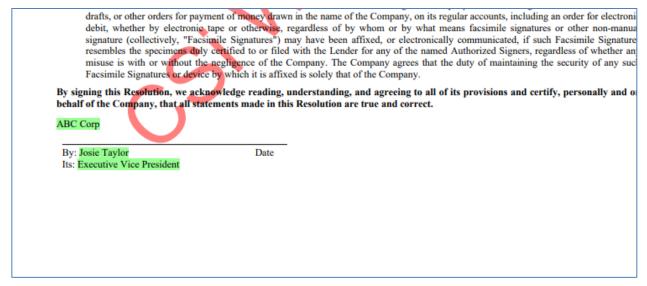


3. The selected **Resolving Party Certifier Authorized Signer** will automatically be indented directly underneath the **Resolving Party Certifier**. Enter a capacity description for the **Resolving Party Certifier Authorized Signer** in the *Capacity* field



Note: If a signature block on one non-individual **Resolving Party Certifier** is configured, signature blocks must also be configured for any remaining non-individual **Resolving Party**Certifiers.

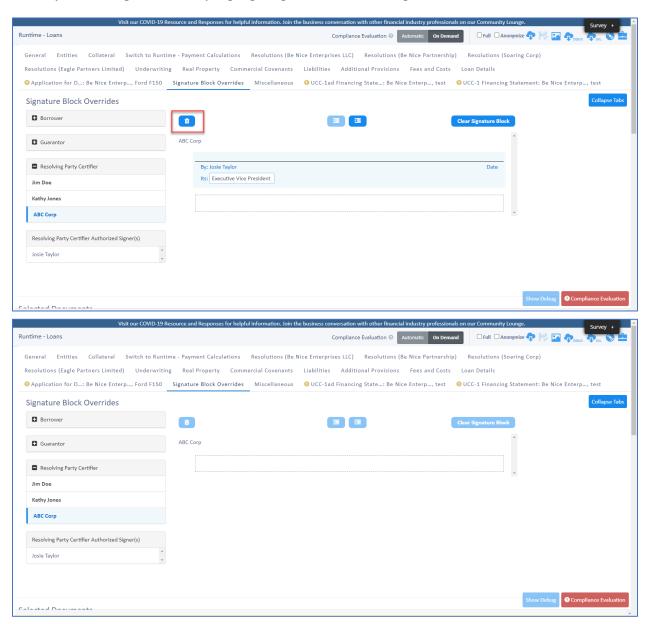
4. When you have completed your signature block configuration for all required entities, you may preview your documents.





Deleting a Line

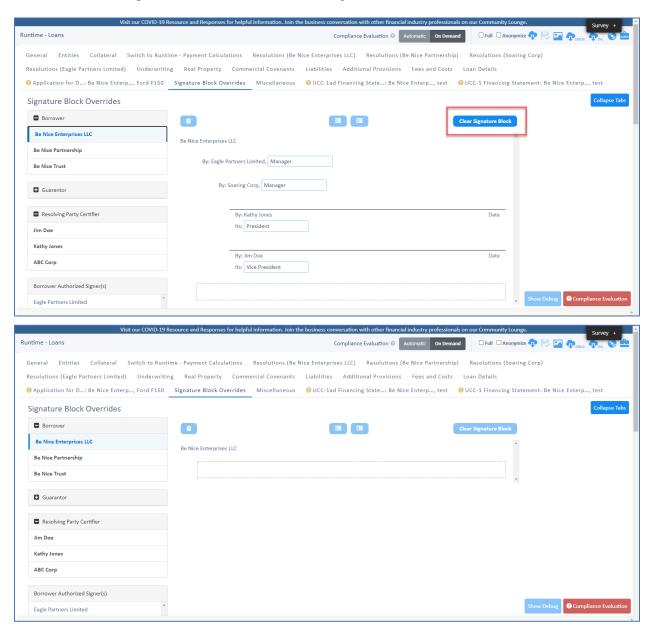
You may delete a signature row by highlighting the row and clicking the *Delete* icon.





Clearing the Signature Block

To delete an entire signature block, click on the Clear Signature Block icon.



Any configurations you make will be saved and available in subsequent sessions for this same loan.



Frequently Asked Questions

Q: If you don't configure a signature block for any of the entities, will the signature block default to what is linked on the Entities Panel?

A: Yes, the Signature Block Override is optional. If you do not configure a signature block for any of the entities in the transaction, it will default to the standard signature blocks generated from role assignment and links reflected on the **Entities** tab within Simplicity Runtime.

Q: What if you have 3 entities but you only need to configure one of them?

A: If you have 3 non-individual entities but only need to configure one of them, you must configure the remaining non-individual entities with the same role.

Q: What documents will use the configured signature blocks?

A: Any configured signature blocks will apply to all commercial lending documents that use the multidepth signature functionality for the main entities of Borrower, Guarantor, Hypothecator and Resolving Party Certifier.

Q: Will it be in a certain library when it becomes available or will it be available to everyone?

A: Yes, the Signature Block Override feature will be available in document library versions 2020.359 and greater. It also requires Simplicity Runtime version 2.99 or greater.

Q: Will entities that are assigned the role of Borrower Authorized Signer in both the platform system and Runtime come through to the Signature Block Override tab?

A: Yes, any entity that is assigned the role of Borrower Authorized Signer will be displayed on the **Signature Block Override** tab under the Borrower Authorized Signer(s) section when an entity is selected.

Q: If I use the Signature Block Override feature, will any required linking on the Entities Panel be resolved?

A: No, you must still resolve any required linking on the **Entities** panel. This will be addressed in the next phase of development.

Q: Am I able to turn off the Signature Block Override functionality in Runtime?

A: Yes, you can hide the Signature Block Override tab in Simplicity Runtime.

Q: If I leverage the Signature Block Override and leave my session, will my changes be available in subsequent sessions

A: Any configurations you make will be saved and available in subsequent sessions for this same loan.



Q: Are there any known limitations I should keep in mind?

A: Yes, there are some known limitations outlined below. Compliance Systems is in the process of addressing these issues in an existing Change Record (CR-3913), with modifications to be available in a future release.

- When an individual entity is assigned multiple roles (Main and Related), such as Guarantor,
 Resolving Party Authorized Signer ad Resolving Party Certified Authorized Signer, and the
 Signature Block Override tab is invoked to use the individual entity as a Resolving Party Certified
 Authorized Signer, the Resolution document is not displaying the configured signature line.
- 2. Configuring a signature block does not resolve or clear any entity-related required linking.