

## Tech Tip #9: Assign who receives internal notification emails in eDOCSignature.

Internal notification emails are the emails that come back to the credit union once the member is finished signing or uploading requested documents. In the past, notification emails always defaulted to the user who created the Package. Now your front-line processors can assign packages to back office closers. For example, if your loan officer is going on vacation, they can assign the completion notification to a specific user or group. This can be done in multiple places anytime during your esign transaction.

1. When sending documents for the first time
2. After the document has been sent
3. When creating templates
4. When managing templates

1. When sending documents for the first time.

The screenshot displays the 'Review Document Information' screen. At the top, there is a navigation bar with a globe icon, the title 'Review Document Information', a help icon, and a share icon. Below the navigation bar are buttons for 'Back', 'Cancel', 'Save', 'Send', and 'Sign Now'. The main content area is divided into several sections: 'Signing Document Name' (ChangeofAddress), 'Signers' (Tim Wright), 'Sharing', 'Index Data', 'Email Me', and 'Document Passcode'. The 'Notification Name' and 'Notification Email' fields are highlighted with orange boxes. The footer contains the text 'Secured by eDOC Innovations, Inc. | Terms and Conditions' and a 'GOODOY VERIFIED & SECURED' logo.

2. After the document has been sent.

Name:

Notification Name:

Notification Email:

Actions: Delete Close Out Send

Signers:  Force signers to use the names below as signatures

Signer Name	Email Address	Msg Type	Auth Code	Group	Resend	Sign
<input type="text" value="Tim Wright"/>	<input type="text" value="twright@edologic."/>	<input type="text" value="Public"/> ▾	<input type="text"/>	<input type="text" value="0"/>		

3. When creating templates.

**Review and Create Template**

Back Cancel Save

Template Name:

Notification Name:  Notification Email:

Signing Document Name	Roles
<input type="text" value="Template Test"/>	

Roles:

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4. When managing templates.

Edit Roles

Cancel

Save

Template Name:

Notification Name:

Notification Email:

Roles

Role	Default Name	Default Email	Required
<input type="checkbox"/> Signer	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Member	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> CoMember	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>



 < Add Role