

ProDOC

In-Person Signing

TM



edoclogic.com 800.425.7766
1197 Exchange St. Middlebury, VT 05753



TRADEMARKS

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PRODUCT OVERVIEW

Welcome to ProDOC, eDOC Innovations' solution to capture, scan, create and save documents that are then stored in the DocLogic database.

IN PERSON SIGNING

ProDOC lets you send documents from your computer to an iPad or tablet for easy in person signing. You are given an URL to use on a mobile device. Log into it using your eDOCSignature user name or a device key, depending on your business setup. The mobile device will remain logged in until you close the browser or until mid-night of that day. Documents are sent from your computer to a queue on this URL—ready for the signer.



Access In Person Signing

Package users can access In Person Signing from the eDOCSignature Manage Package screen or the ProDOC Packages Manager.

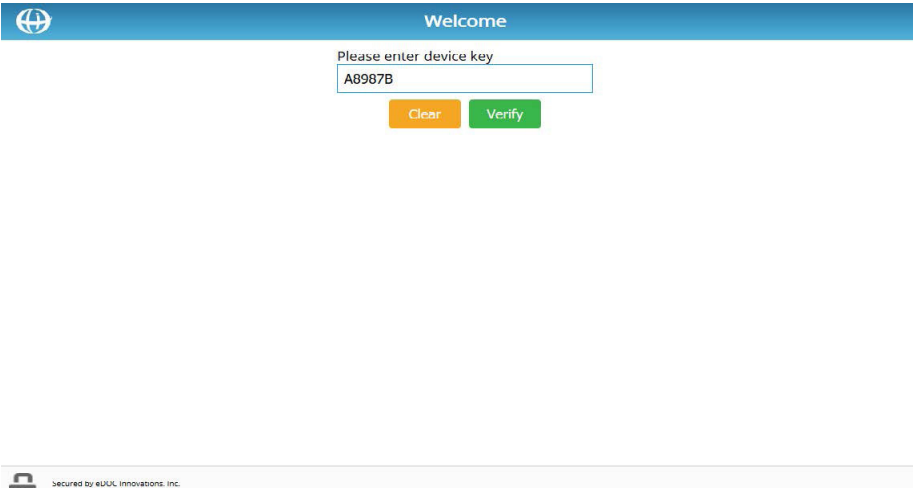
Package Name	Status	Created	Modified	Created By	
Erin Application Summer 06102019	Ready To Sign	06/10/2019	06/10/2019	LWEEKES@REED	Edit
Karl Testing Application Summer 0519 2019	Waiting for Doc	05/19/2019	05/19/2019	LWEEKES@REED	Edit
Tim Wright 2019 Application 05152019	Documents Signed	05/15/2019	05/15/2019	LWEEKES@REED	Edit
Wright Tim Application Summer 0515 2019	Ready To Sign	05/15/2019	05/15/2019	LWEEKES@REED	Edit
Angela Application 05082019	Waiting for Doc	05/08/2019	05/08/2019	LWEEKES@REED	Edit
Susan Spring Application 05062019	Ready To Sign	05/06/2019	05/06/2019	LWEEKES@REED	Edit

- Setup...
- Upload...
- Reload Form Definitions
- Create...
- Scan...
- Load Pending...
- Packages...**
- Saved Documents...
- Change Password...
- Edit Users and Groups...
- About ProDOC...
- Log off CSHAW...
- Exit

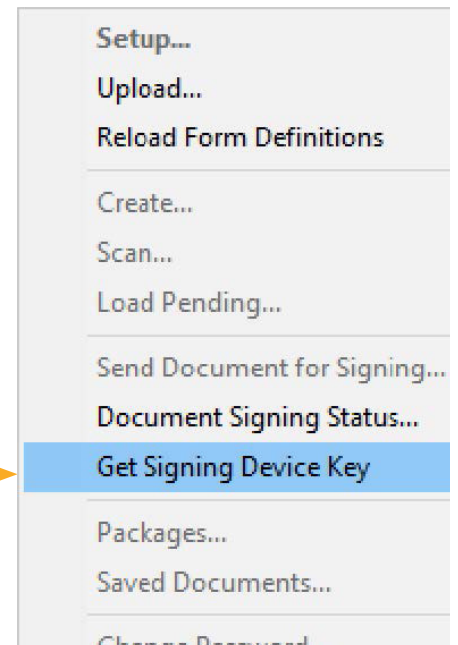
EDOCSIGNATURE MANAGE PACKAGES

iPad or Tablet Login

On the iPad or tablet, use the assigned URL to log in with your email or device key.

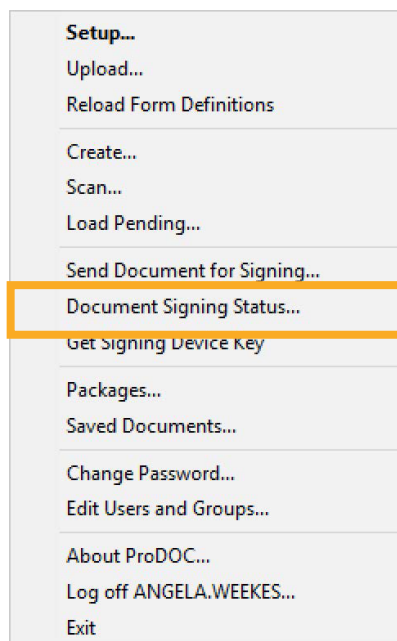


Find your device key from the ProDOC Main Menu. Click Get Signing Device Key. Type this key into the iPad or Tablet login.



In ProDOC

Click **Document Signing Status**.



Click **Edit** on the desired package.

The screenshot shows the 'Package Results' page with a table of packages. The 'QC testing' package is highlighted, and its 'Edit' button is circled in orange.

Package Name	Status	Created	Modified	Created By	Next
4 Test Package GUpGINILow	Ready To Sign	08/19/2019	08/19/2019	SELENIUMTEST@QC	Edit
1 QC testing	Completed	08/16/2019	08/16/2019	KJOHNSON@QC	Edit
1 Karl TEsting with new iSweep	Completed	08/16/2019	08/16/2019	KJOHNSON@QC	Edit
1 Application 08-16-2019	Out For eSign	08/16/2019	08/16/2019	ELATHROP@QC	Edit
1 Application 622019	Out For eSign	07/30/2019	08/16/2019	ELATHROP@QC	Edit
1 Application 08-16-2019	Out For eSign	08/16/2019	08/16/2019	ELATHROP@QC	Edit
1 VisaApplication 08-16-2019	Completed	08/16/2019	08/16/2019	ELATHROP@QC	Edit
2 Development Status and Review Minutes 07-26-2019	Ready To Sign	07/26/2019	08/16/2019	ELATHROP@QC	Edit
1 test Keith2	Out For eSign	08/15/2019	08/15/2019	KKRAMER@QC	Edit
1 Loan AP_KKRAMER_20190815_104105	Completed	08/15/2019	08/15/2019	KKRAMER@QC	Edit

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GODADDY VERIFIED & SECURED VERIFY SECURITY

Click the **Sign** icon next to the in person signer. This will put the document into the signing queue.

The screenshot shows the 'Manage Package' form with the 'Sign' icon highlighted for the signer 'Susan Spring'.

Manage Package

Name: New Application Test

Notification Name: Angela Weekes QC

Notification Email: angela.w.weekes@gmail.com

Actions: Delete Reset Close

Signers: Force signers to use the names below as signatures

Signer Name	Email Address	Msg Type	Auth Code	ID	Group	Resend	Sign
Susan Spring	sspring@gmail.com	Public		<input type="checkbox"/>	1		
William Winter	will.winter@edoc	Public		<input type="checkbox"/>	1		

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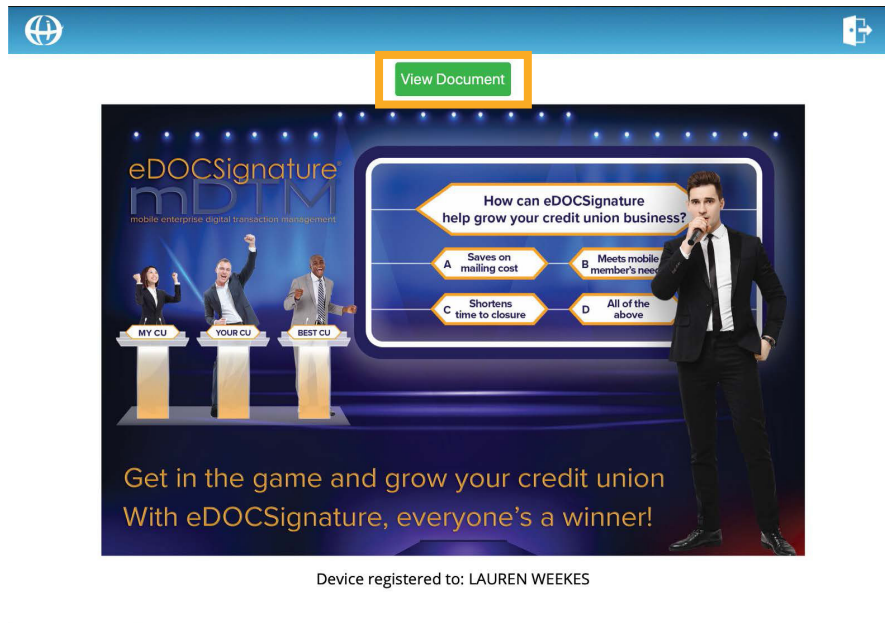
GODADDY VERIFIED & SECURED VERIFY SECURITY

Only one signer's documents can be in the signing queue at a time. If there are multiple in person signers, wait until the first signer is finished, then click the **Sign** icon for the next signer.

Signing Documents

Hand the mobile device to the signer, where they click **View Document** and follow the signing prompts.

This is a one-time access per signer. Once the signer exits the signing process, access is closed. If additional access is needed, you can resend the documents to the queue.



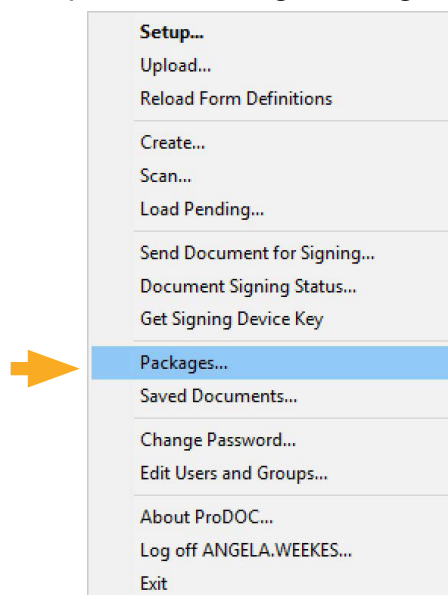
PRODOC PACKAGE MANAGER

On iPad or Tablet Login

On the iPad or tablet, use the assigned URL to log in with your email or device key.

In ProDOC

From the Main Menu, open the Package Manager.



Open the desired package and create the document. Click **eSign**.

ProDOC - Signature Capture(ANGELA.WEEKES)

Form Name: New Member Application

Account: 1239784
SSN: 000-00-0000
First Name: Sally
Last Name: Summer
Other:
*Required

Page 1 of 1 | Scan Page | Scan Options... | Add Fillable Field | Import File

My Application

34 Seasons Dr. Summerville, VT, 54032
Phone: (123) 456-7890 Fax: (123) 456-7865
SeasonsCU.org

Personal Information

My Name: SSN: Birth Date:
Street: City: State: Zip:
My Phone Numbers - Home: Work: Cell:
My Employer is: My Email Address:
Mother's Maiden Name: Security Password:

I Want These Accounts and These Services

Savings Account (\$10 minimum balance) I want Direct Deposit
 Checking Account (totally free) I want a Debit/Check/ATM card
 Debit Account I want Online Banking & eStatements
 Certificate of Deposit I don't want Overdraft Protection
 Individual Retirement Account (IRA) I don't want Courtesy Pay
 Money Market I want eDeposit

Add this document to package:
 Active AI Current User All Refresh

User | Print | Pending | **eSign** | Save | Cancel

Fill in the signer information. Click **Ready for Sign Now**.

Signer Information

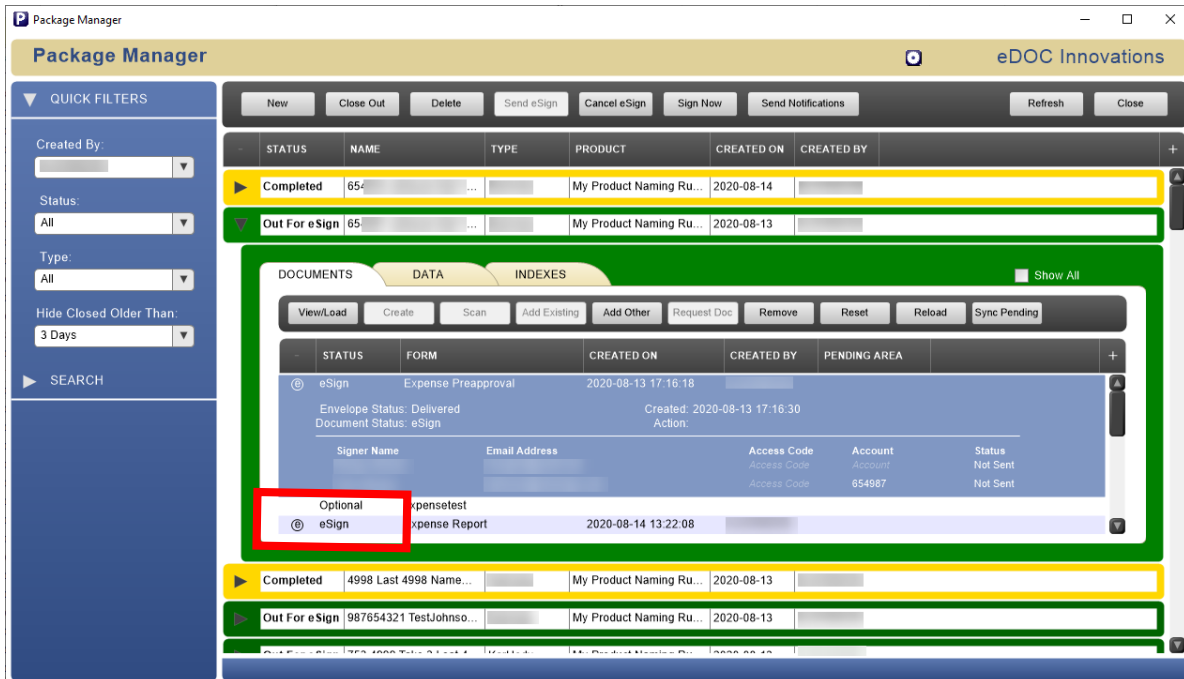
Include eDOC Signer Use personal data verification

Role: eDOC Signer Name: Sally Summer
 Auth Code: eMail: ssummer@seasons.com

Signature boxes to include:
 Applicant Signature
 Applicant Date

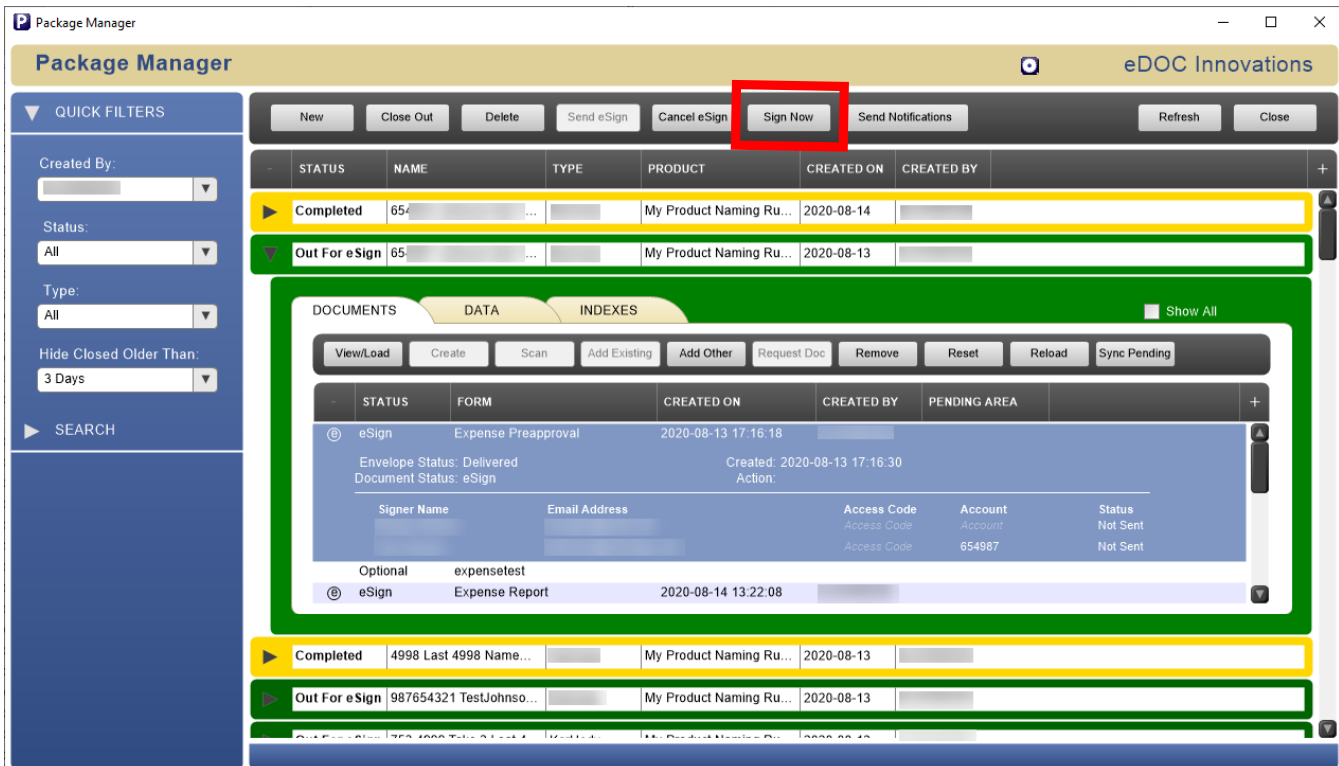
 Ready for Sign Now Done Cancel

The document in your package is placed into an **eSign** status.

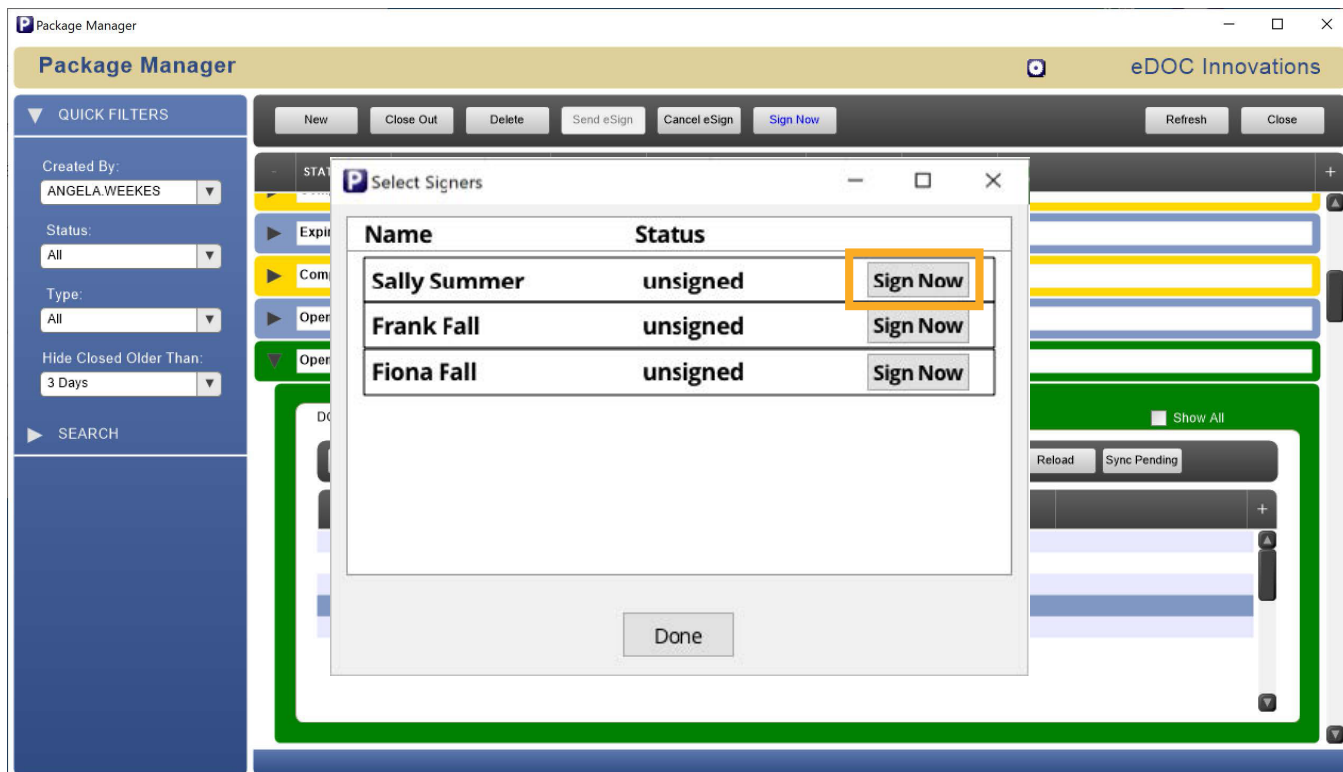


In the Package Manager, select the **Sign Now** button.

Note: If you would rather send an email notification to a signer containing a link to complete the signing process, you can click **Send Notifications**.



In the window that appears, click **Sign Now** next to the desired in-person signer. The Status will then change from “Unsigned” to “Sent to Device.”



Hand the iPad or tablet to the signer, where they click **View Documents** and follow the signing prompts.

The icon, brand colors and marketing image on this landing page can be customized for your business. This feature is available for Enterprise level users. Contact eDOC’s sales team for more information.

