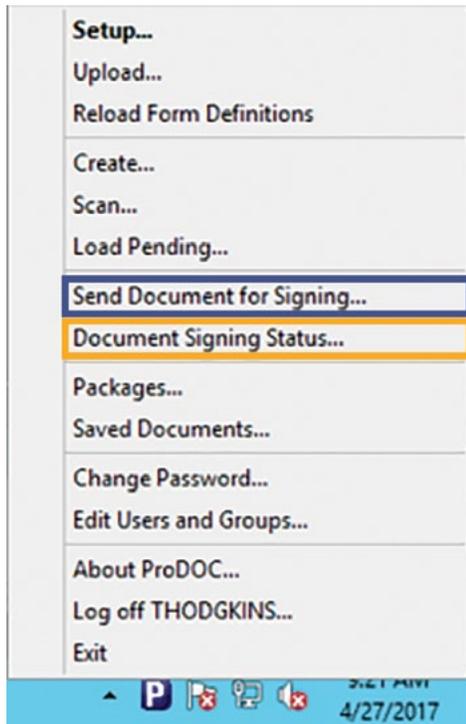


Quick Reference Guide

Using eDOCSignature with ProDOC

ProDOC: New Menu Options



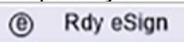
Handoffs to the eDOCSignature website to upload documents that do not originate in ProDOC – this is for your one-off, unique document sends. This is not the place to send documents that are already built into your ProDOC system (forms listed under the “create” menu option).

Handoffs to the eDOCSignature website:

1. The first time you click, it will ask for your email address (twice) and your name – this registers your ProDOC user with eDOCSignature.
2. Subsequent clicks of this button handoffs to the eDOCSignature management page, where you can manage, edit, and review documents out for remote signature.

ProDOC: Package Manager Use

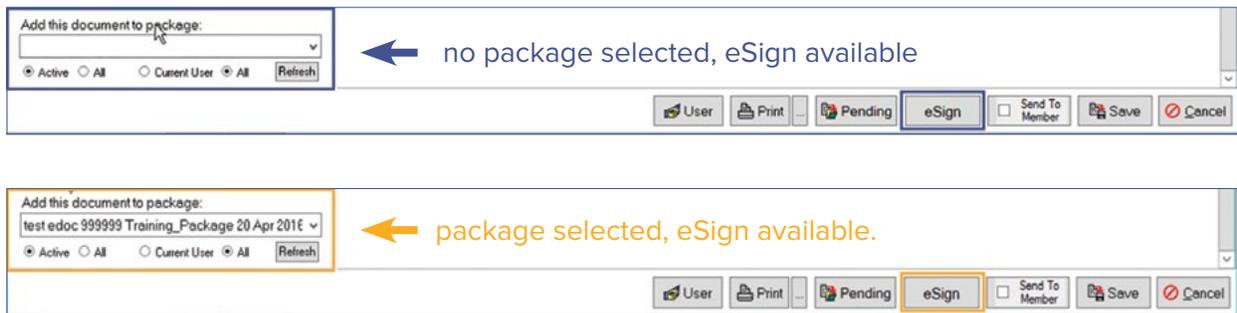
If you used eSign through ProDOC Packages with another eSign provider, there is only one difference.

- Prepare your forms for remote signature by clicking  in ProDOC, which puts them in a  status in Package Manager.
- When you have gathered all of the documents for remote signing, click  at the top of the Package Manager interface.
 - *NEW: Items will send and return every 1 minute, 24 hours a day - no more waiting up to 15 minutes!*
- Proceed communicating with your member to provide instructions, access code, etc.
- When items are signed, they will automatically come back into Package Manager (and your database) as .

ProDOC: You Can Now eSign a Single Form

New: Now send single ProDOC forms out for eSign. No need to *package* to get them to your member's email. You will notice that the  button at the bottom of ProDOC forms will be illuminated even if the item is not in a package.

 Use caution when clicking the  button. If your intent is to send the document in a package, the package must be selected. If a package is not selected, the document will go out independently for remote signing.



no package selected, eSign available

package selected, eSign available.

eDOCSignature Website

As a ProDOC client, you also can go to eDOCSignature directly and sign in with your email address and ProDOC Password.

<https://edocsigadmin/index.php>



Welcome to eDOCSignature	
 Send Documents	Allows you to upload and send documents for remote signing. Note: Intended for documents OUTSIDE of your ProDOC form list. This is where you handoff your "Send Document for Signing" in ProDOC.
 Manage Documents	Allows you to review, edit, re-send, and manage documents. This is where you handoff to your "Document Signing Status" in ProDOC.
 Setup Template	Allows you to configure a document for repetitive-use to reduce the time it takes to send documents out.
 Manage Templates	Allows you to edit and manage your existing templates.
 Settings	Allows you to change your password. Tabs available in Settings depend on permissions. Users with elevated permissions can edit other users and groups, as well as edit indices and disclosures.



CLICK ON THE HELP BUTTON in the upper right corner of any eDOCSignature screen for assistance for the page you are viewing. You also can navigate to other sections of Help through the Help Table of Contents.