

# ProDOC

## In-Person Signing

TM



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## 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.



- Setup...
- Upload...
- Reload Form Definitions
- Create...
- Scan...
- Load Pending...
- Send Document for Signing...
- Document Signing Status...
- Get Signing Device Key**
- Packages...
- Saved Documents...
- Change Password...

### In ProDOC

Click **Document Signing Status**.

- Setup...
- Upload...
- Reload Form Definitions
- Create...
- Scan...
- Load Pending...
- Send Document for Signing...
- Document Signing Status...**
- Get Signing Device Key
- Packages...
- Saved Documents...
- Change Password...
- Edit Users and Groups...
- About ProDOC...
- Log off ANGELA.WEEKES...
- Exit

Click **Edit** on the desired package.

The screenshot shows the 'Package Results' page with a table of packages. The 'Edit' button for the 'QC testing' package is highlighted with an orange box. The table has columns for Package Name, Status, Created, Modified, and Created By. A 'Next' button is visible at the end of each row.

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

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. The 'Sign' icon for the signer 'Susan Spring' is highlighted with an orange box. The form includes fields for Name, Notification Name, and Notification Email, along with a table of signers.

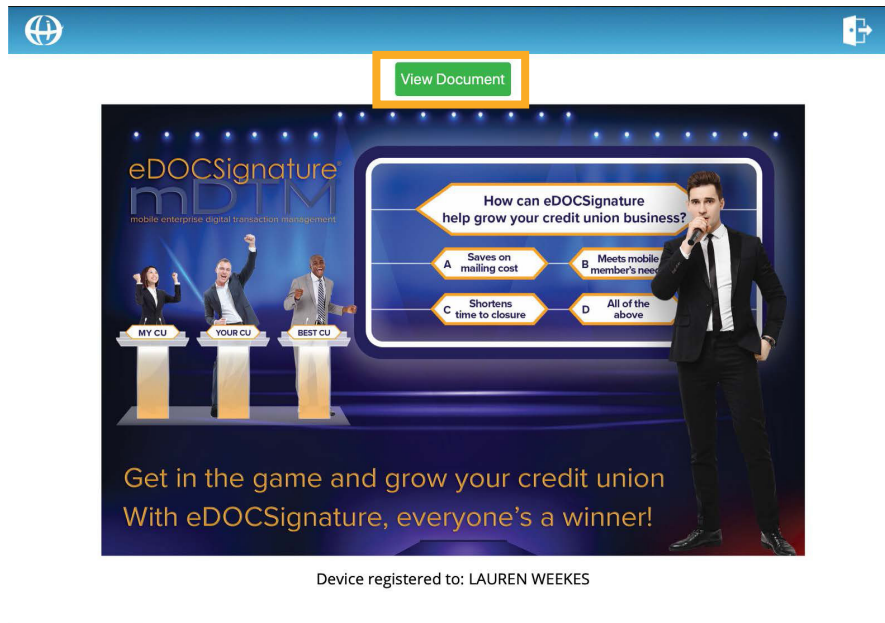
Signer Name	Email Address	Msg Type	Auth Code	ID	Group	Resend	Sign
Susan Spring	sspring@gmail.com	Public		<input type="checkbox"/>	1		
William Winter	will.winter@edoc	Public		<input type="checkbox"/>	1		

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.



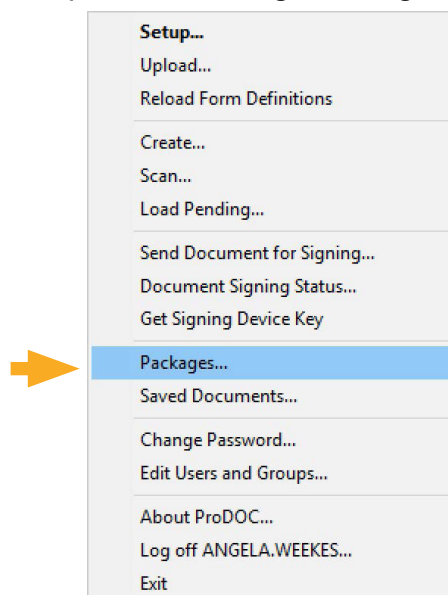
## PRODOC PACKAGE MANAGER

### 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.



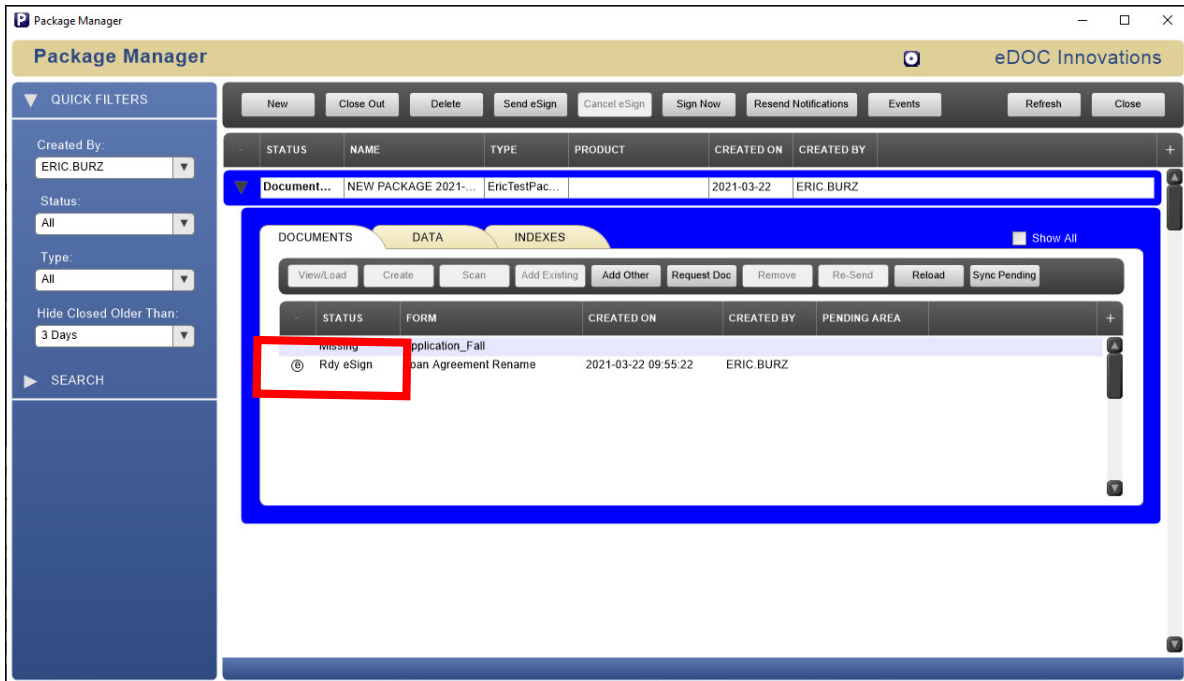
Open the desired package and create the document. Click **eSign**.

The screenshot shows the ProDOC Signature Capture interface. On the left, there's a sidebar with form details: Form Name: New Member Application, Account: 1239784, SSN: 000-00-0000, First Name: Sally, Last Name: Summer, and an 'Other' field. The main area displays the 'My Application' form for Seasons Credit Union, with contact information and a 'Personal Information' section containing fields for name, SSN, birth date, street, city, state, zip, phone numbers, employer, email, and mother's maiden name. Below this is a section titled 'I Want These Accounts and These Services' with various radio button options. At the bottom right, the 'eSign' button is highlighted in orange.

Fill in the signer information. Click **Done**.

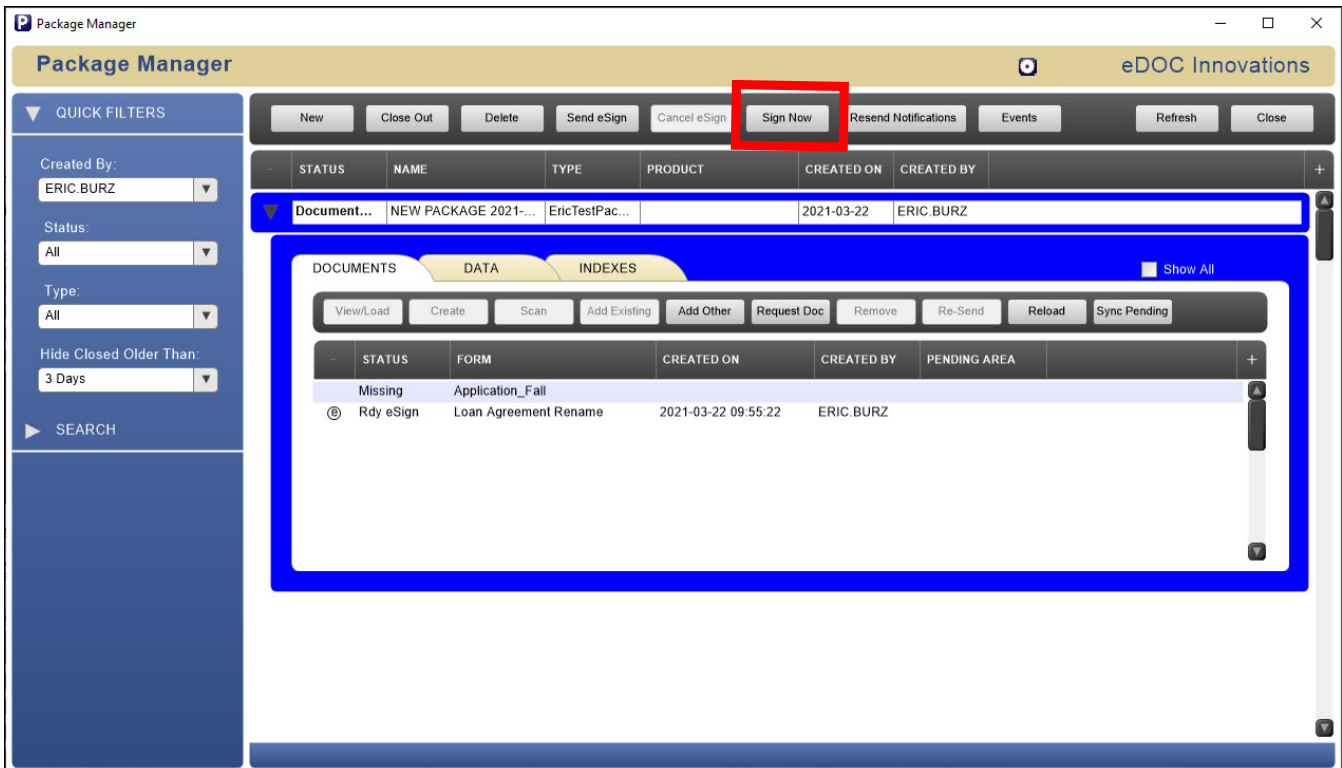
The 'Signer Information' dialog box is shown. It has two main sections. The first section includes checkboxes for 'Include eDOC Signer' (checked) and 'Use personal data verification' (unchecked). Below these are fields for 'Role' (eDOC Signer), 'Name' (Sally Summer), 'Auth Code', and 'eMail' (ssummer@seasons.com). The 'Notification Type' is set to 'Email'. The second section, 'Signature boxes to include', has checkboxes for 'Applicant Signature' and 'Applicant Date', both of which are checked. At the bottom, there is a 'Generate Authorization Codes' button and a 'Done' button highlighted in orange.

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



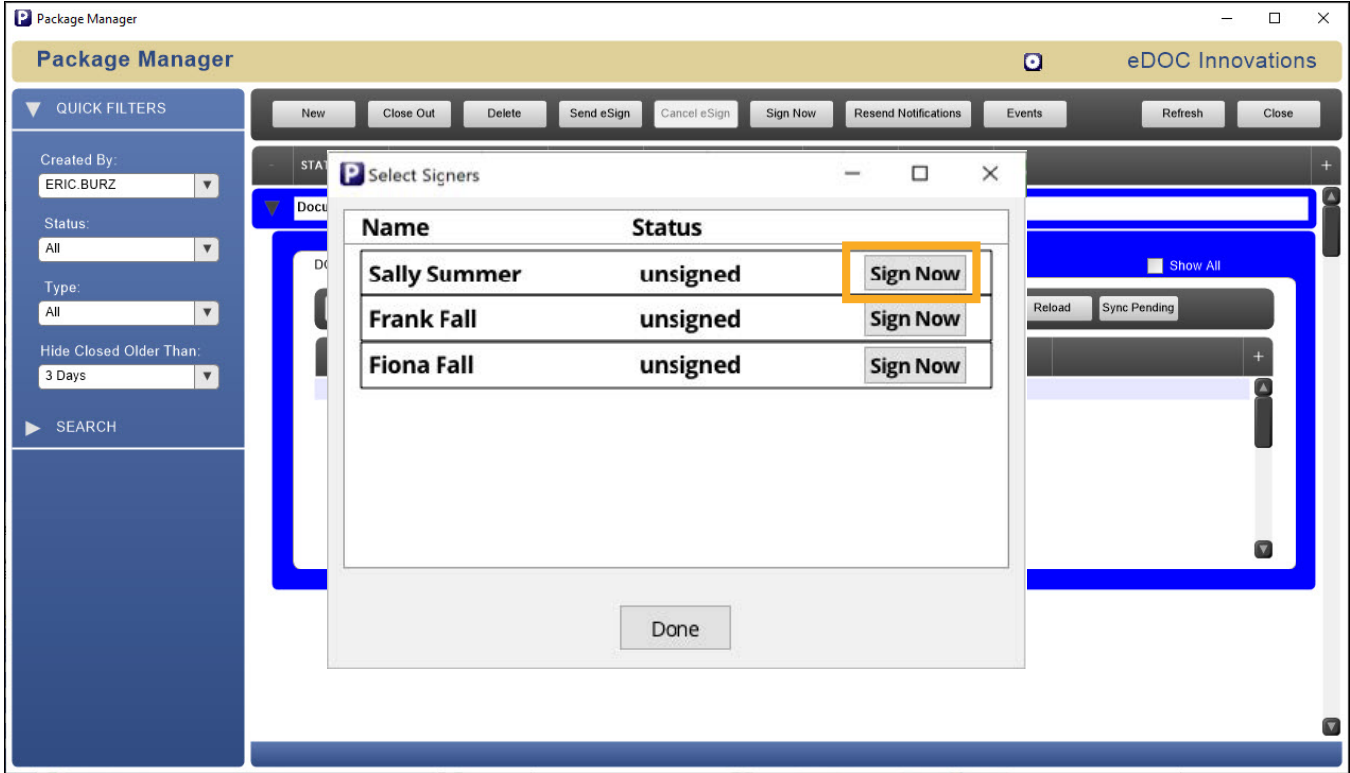
In the Package Manager, select the **Sign Now** button.

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





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.

