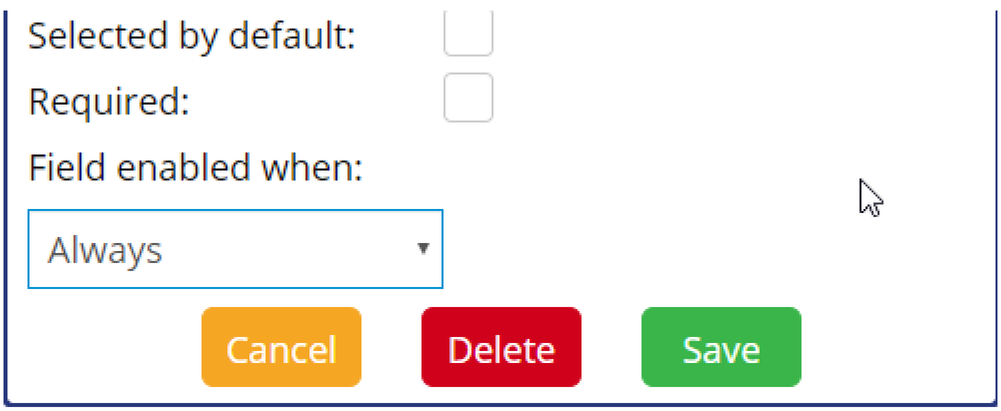
Tech Tip #52: eDOCSignature Dependencies

*****These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.*****

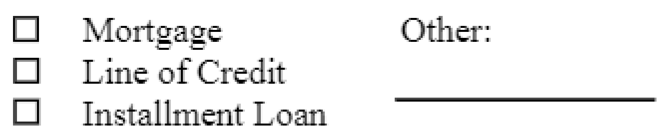
eDOCSignature offers a quick and easy way to generate documents for eSign that contain fillable elements such as a signature, date, and many other elements. There are some "hidden" features such as **dependencies** that can make the member signing experience even easier and more clear when set up.

Dependencies refers to the section at the bottom of the field settings indicated by the "Field enabled when" section. To avoid confusion, the default setting is **Always**, meaning that this field will *always* appear on the document for the member to complete.



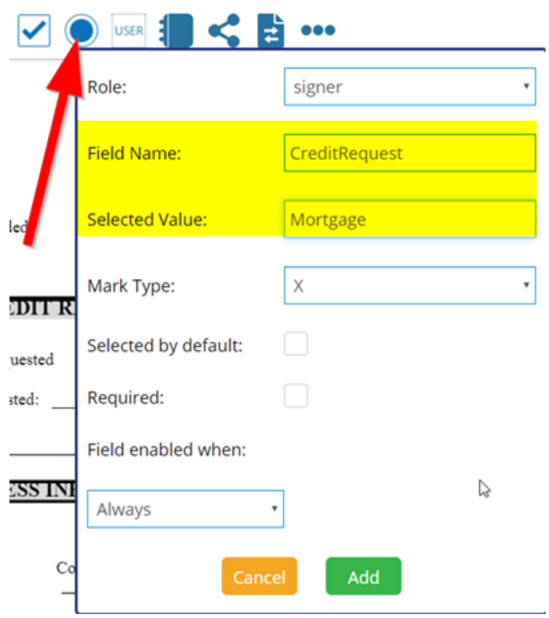
The overall purpose of this feature is to allow certain boxes to toggle the visibility/requirement of a field depending on the previous options selected by the member.

For example, let’s look at a business loan application. There is a field for the type of credit being requested. There is a list of options: Mortgage, Line of Credit, Installment Loan, and Other. If the "Other" field is selected, there is a section below for the member to enter more information. However, this field is **not** necessary if one of the former three options are selected. Therefore, you can use dependencies to make this as clear as possible for the member.


☐ Mortgage
☐ Line of Credit
☐ Installment Loan

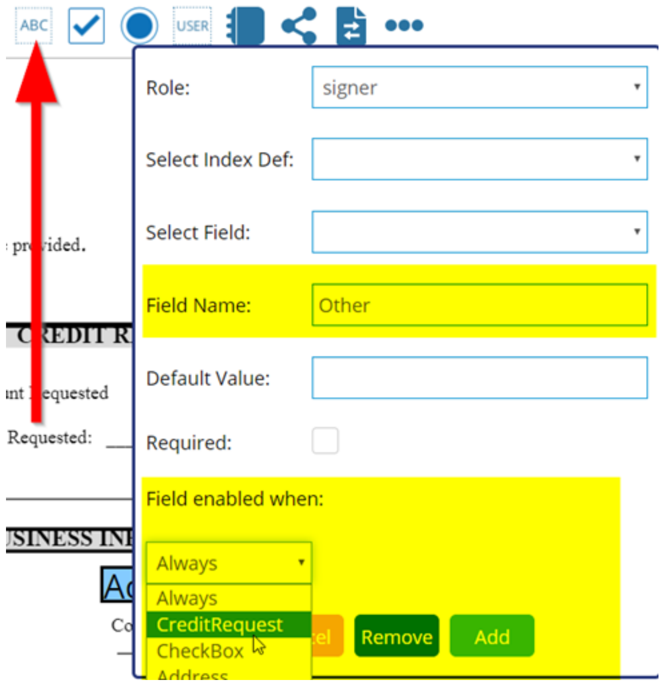
Other: ______________

Start by creating a set of four **Radio Boxes** for these questions. They will all need the same **Field Name**; in this case, we will use the field name "CreditRequest." The **Selected Value** will differ for each radio box being set up, corresponding with which of the four options the member can pick.

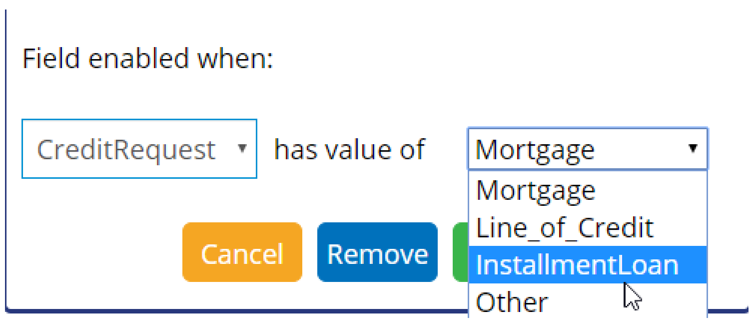


Now we need to create a text field using the **ABC Text Box option**. We will enter "Other" in the **Field Name** to indicate the purpose of this field. From here, we use the "Field enabled when" drop-down list to see a list of the different fields we can use as a trigger.

For this example, we want to use the set of **Radio Boxes** created with the **Field Name** "CreditRequest."



Selecting "CreditRequest" will open another set of options. These options show us each of the **Radio Boxes** we set up; we want to select "Other." Lastly, we need to click "Save" to save the changes.



When signing, the member will not see this section unless they press on "Other." This prevents the member from accidentally filling it out if they are not reading carefully.

There are several ways to utilize dependencies. See what you can create on your own. If you have any questions about a specific setup, you can always reach our support team for help and guidance.