

## Updating CSI New Account Console (NAC) Custom Forms

### Adding a text field for Document identification

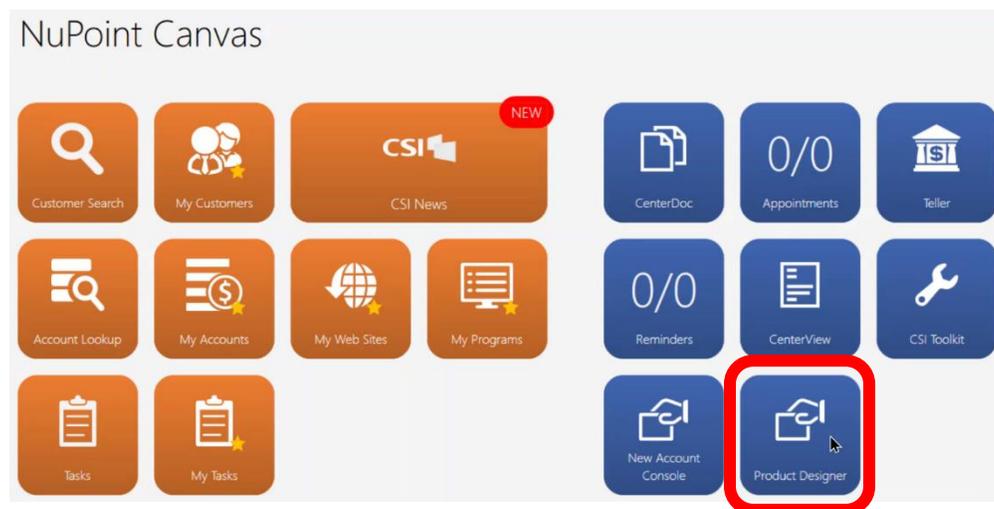
Documents generated from Custom Forms in NAC are “flattened” or image-based PDFs. Only fields added during the generation of new documents from those form templates are text-based.

To facilitate the **identification** of documents by eSign as quickly and accurately as possible, it is recommended that a text-based identifier (e.g., “Form Description”) be added to the Custom Form so that OCR (optical character recognition) is not needed to “read” the document name.

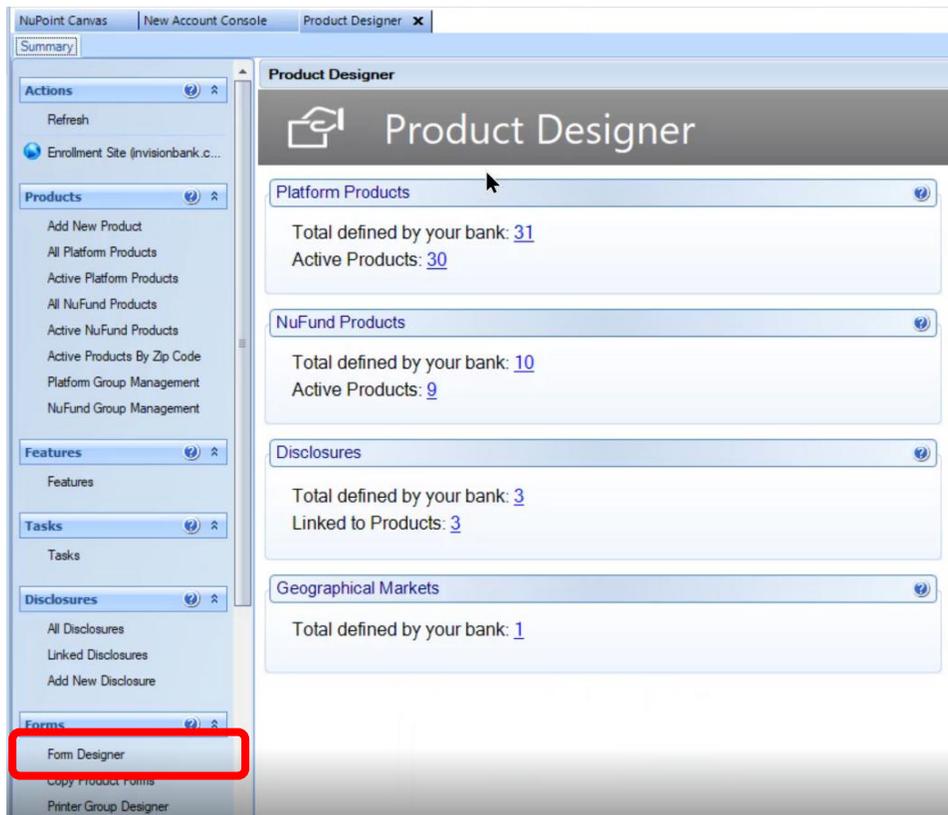
### Updating existing Custom Forms

#### Adding Form Name/Document Name value in text

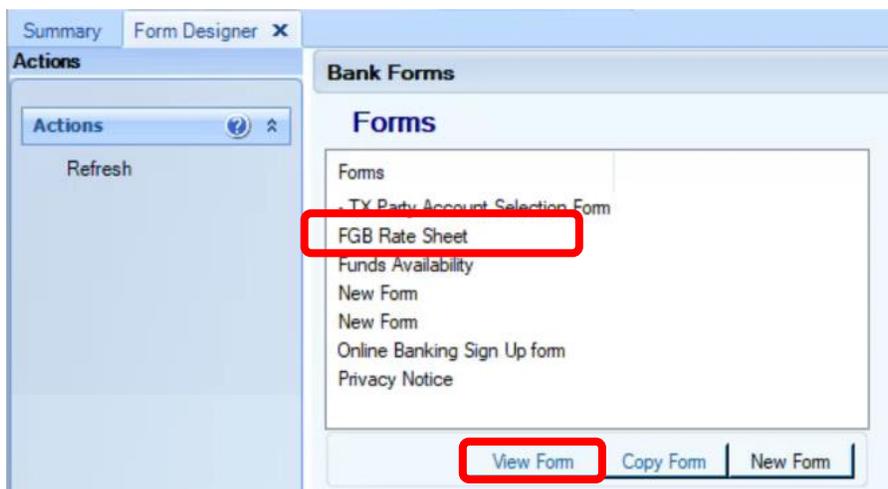
From NuPoint Canvas, click on Product Designer to open.



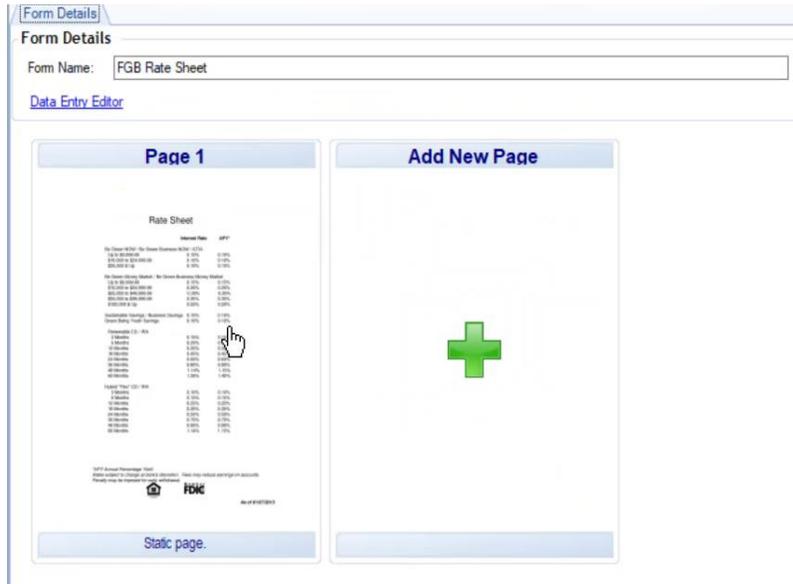
On the Product Designer screen, click on **Form Designer** under forms in the list on the left



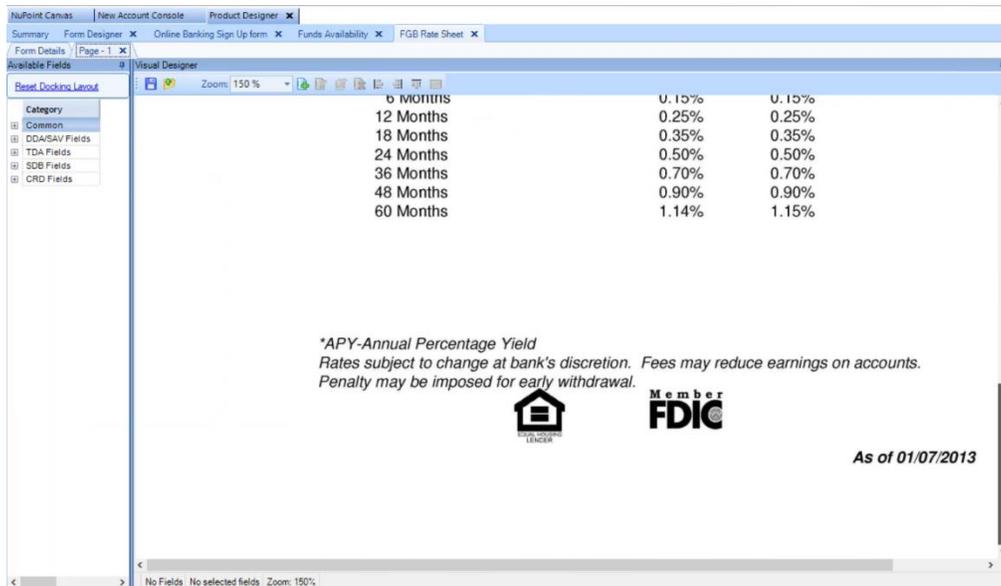
From the list of Forms, click on the form you are going to update and click on the **View Form** button at the bottom of the screen



On the Form Details screen, double click on the first page of the form to open it in the visual designer



Scroll to the location where you will place the Form Name/Document Name field (typically at the bottom left or right)



Right click on the location where you wish to place the field and from the pop-up, select **Add Field**



In the Edit Field dialogue that opens, change the **Font** to Times New Roman

In the **DDN** field, select “Form Description” from the drop-down menu – you can start typing “Form Description” to move to that option quickly.

This will set the value in the field to be the same as the Form name in the forms list.



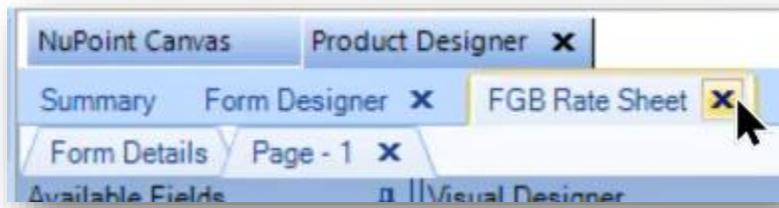
Then type the form name in the **Test Value** field so that you can see what the field will look like. In this example “FGB Rate Sheet.”

*\*APY-Annual Percentage Yield  
Rates subject to change at bank's discretion. Fees may reduce earnings or  
Penalty may be imposed for early withdrawal.*

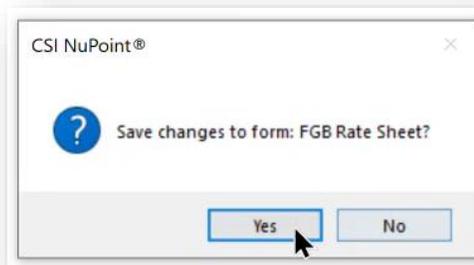
**FGB Rate Sheet**



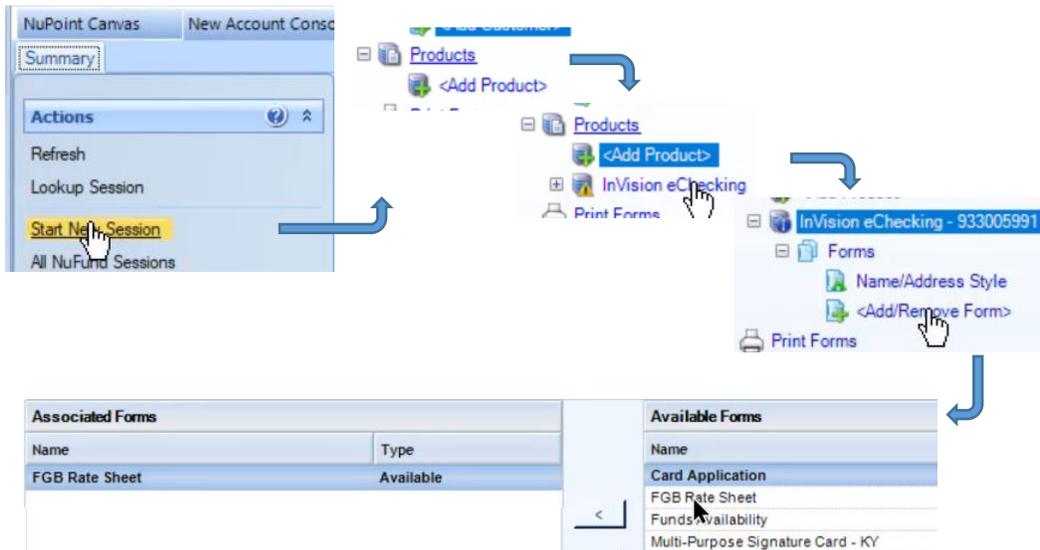

To save, close the document tab using the X at the top.



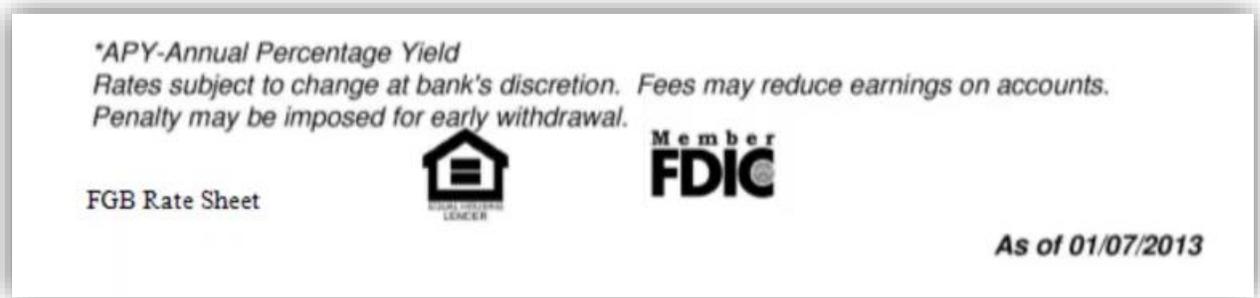
Then save when prompted.



Once you have completed these steps, test the creation of a new document using this form by going to New Account Console and selecting one of the Products that has it assigned.



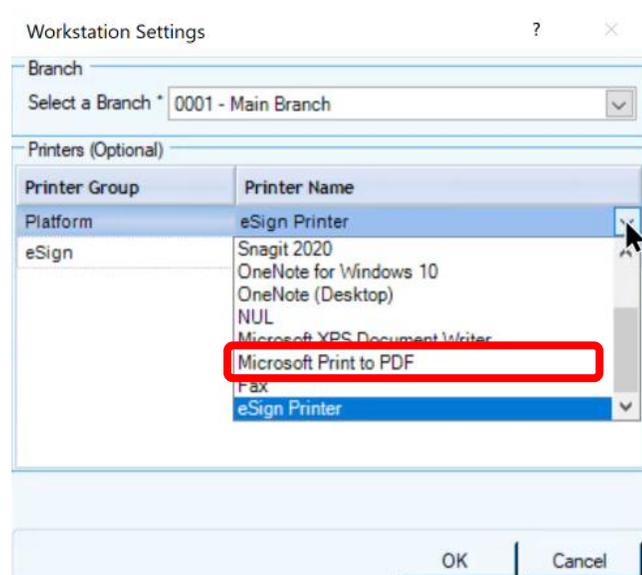
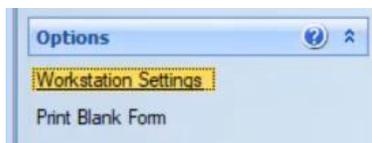
The form should display with the Form Name (aka Document Name) in the location where you placed it.



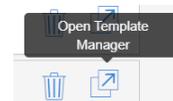
Now you can re-define the Template in eSign to no longer use OCR and utilize this value for the Document identification.

## Updating eSign Template

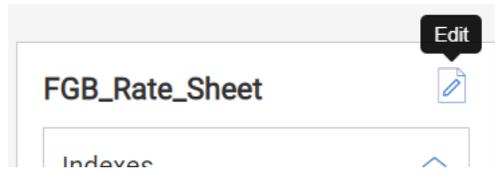
1. Close out of NuPoint and reopen
2. Change the chosen printer in the Workstation Settings to create a PDF



3. Print a document (PDF) using the Custom Form using dummy customer data
4. Go into eSign and launch Documents Maintenance using the Document (RTS) option under the Administration drop down
5. Locate the Document Template you need to update and click the Open Template Manager button



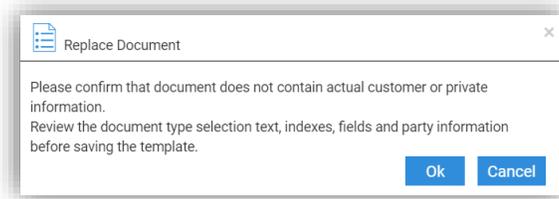
- Open the document definition dialog by clicking Edit next to the Document Template Full name in the upper left of the screen. Take note of the **existing** settings for Short Name, Full Name, Description, etc.



- Use the upload button in the upper right to replace the template document with the new PDF created.



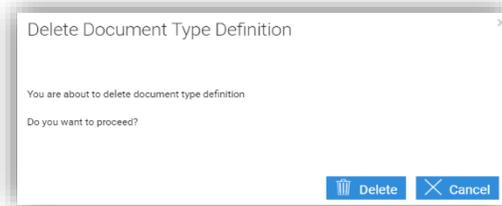
You will see a warning about using a sample document without customer data on it



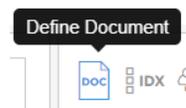
- Delete the document definition in the template by right clicking on the old text used for recognition and selecting Delete.



You will receive a warning about deleting the document type definition



- Scroll down to the new field and use it to redefine the template by first clicking on the Define Document icon. Then draw a box around the new field, and then complete the Define Document dialog.



Since you will need to re-enter the Short Name, Full Name, Description, and any other options, it's a good idea to look at the document definition prior to deleting it (step 6 above). Be sure that you see the Form Name in the Selection Text box and do **not** select Perform OCR.

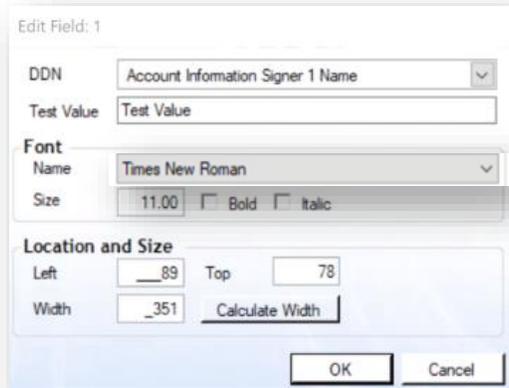
- Click Save

- Return to NuPoint and change the default printer back to eSign and test.

### Adding Owner Name/Signer Name value

In some cases, a Custom Form may have a signature line but not have a field that captures the owner, or signer, name. If this field is missing, you can add it in much the same way we added the Form Name above. Adding this will allow the customer/owner name to be recognized as a party in eSign.

Follow the steps above but when setting the DDN value for the field use the “Account Information Signer 1 Name” value. This will populate the field with the Customer Name. Be sure to choose Times New Roman for the font.



Generate a sample document from NuPoint as above with a value in the Signer Name field and then use that sample PDF to update your template in eSign by uploading the new sample and setting a Party location for extraction.

If you know in advance that you'll be adding both a Form Name and a Signer Name to the Custom form in NAC, you can do both at the same time in Forms Designer and make both changes in eSign at once.