

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

		Bank Forms
0	*	Forms
		Forms
	ſ	FGB Rate Sheet
		Funds Availability
		New Form
		New Form
		Online Banking Sign Up form Privacy Notice
		View Form Copy Form New Form
		() \$



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

in Details		
Name: FGB Rate Sheet		
a Entry Editor		
Page 1	Add New Page	
Rate Sheet		
Internet False & #FV* the Deser NoTe! the Search Nameurs NoTe! (20.6		
10.5 K 00.000.00 8.70% 0.10% 31.60.00 K 30.600.00 8.70% 0.10% 32.60.00 K 30.000.00 8.70% 0.10% 32.60.00 K 30.00 K 3		
1.4 0 0.1% 0.1% 1.5 0.0 0.0% 0.0% 0.0% 0.1 0.0 0.0% 0.0% 0.0% 0.1 0.0 0.0% 0.0% 0.0% 0.1 0.0 0.0% 0.0% 0.0% 0.1 0.0 0.0% 0.0% 0.0%		
Inclusion Large Aurona Datase 1 (19) Generalized Family 1 (19) Generalized Family 1 (19)	-	
21 Manute 29 Manute 21 Man		
1944 794 (20:99) 1949 (20:99) 1		
Alfred Lafe, Lafe, Ribert Lafe, Lafe, Ribert Lafe, Lafe, Ribert Lafe, Ribert Lafe,		
1079 Janual Personinger Vali		
Title Hold		
Static page.		

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

NuReint Courses	munt Canada Destant Designer M				
Summary Form Designer	Opline Backing Sign Up form X Fun	Analability X EGB Pate Sheet X			
Form Details Page - 1 X		a wrandoniny w Tradition Singer w			_
Available Fields 4	Visual Designer				ą
Reset Docking Layout	🗄 😰 Zoom: 150 % 🔹 🏚				
Category		6 MONTINS	U.15%	0.15%	^
Common		12 Months	0.25%	0.25%	
E DDA/SAV Fields		18 Months	0.35%	0.35%	
TDA Fields		24 Months	0.50%	0.50%	
SDB Fields CRD Fields		36 Months	0.70%	0.70%	
		48 Months	0.90%	0.90%	
		60 Months	1.14%	1.15%	
	1	*APY-Annual Percentage Yie Rates subject to change at b Penalty may be imposed for	eld ank's discretion. Fees may reduc early withdrawal. The the the the the the the the the the t	e earnings on accounts. As of 01/07/2013	
< >	No Fields No selected fields Zoom: 150%				



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

k	Select All	Ctrl+A	
	Add Field		
	Paste Field	Ctrl+V	

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

DDN	0	0		
Test Value	Test Value			<u> </u>
Font				
Name	IDAutomat	ionC39S		~
Size	10.00	Bold	T Italic	
Location a	nd Size			
Left	106	Тор	975	
Width	_100	Calcula	te Width	

DDN	0 ~
Test Value	Test Value
Font	
Name	IDAutomationC39S
Size	Microsoft Sans Serif Courier New
Location a Left	Times New Roman If Anal Tahoma IDAutomationC39S
Width	_100 Calculate Width

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.

Bank Forms
Forms
Forms
TX Pady Account Selection Form
FGB Rate Sheet
Funds Availability

DDN	Form Description					
Test Value	Application 7	DDN V	Name			
Fant		-6319	Form Barcode Page 19			
Name		-6302	Form Barcode Page 2			
manie		-6320	Form Barcode Page 20			
Size		-6321	Form Barcode Page 2			
1.12		-6322	Form Barcode Page 22			
Location ar		-6323	Form Barcode Page 23			
Left		-6324	Form Barcode Page 24			
WARE		-6325	Form Barcode Page 28			
TTIGET		-6326	Form Barcode Page 28			
		-6327	Form Barcode Page 2			
		-6328	Form Barcode Page 28			
		-6329	Form Barcode Page 25			
	Common	-6303	Form Barcode Page 3			
		-6330	Form Barcode Page 30			
		-6304	Form Barcode Page 4			
		-6305	Form Barcode Page 5			
		-6306	Form Barcode Page 6			
		-6307	Form Barcode Page 7			
		-6308	Form Barcode Page 8			
		-6309	Form Barcode Page 9			
		-6201	Form Barcode Text			
		-6200	Form Barcode Value			
		-6002	Form Class			
		-6003	Form Description			

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."

-		-6201 Form Barcode Text
Edit Field: 1		-6200 Form Barcode Value
		-6002 Form Class
DDN	Form Description	-6003 Form Description
Test Value	FGB Rate Sheet	
Font	k	8
Name	Times New Roman ~	
Size	10.00 Bold E talc	
Location a	and Size	
Left	138 Top 966	*APY-Annual Percentage Yield
Width	_100 Calculate Width	Rates subject to change at bank's discretion. Fees may reduce earnings c
	OK Carr	
		EDUL HOUSING



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.

NuPoint Canvas	New Account Consc	Products			
Actions Refresh Lookup Session Start Nelk-Session All NuFund Sessions	() *	Add Product	Products CAdd Nisio Print Form	Product> on eChecking	hecking - 933005991 he/Address Style d/Remove Form>
Associated Forms				Available Forms	
Name		Туре		Name	
FGB Rate Sheet		Available		Card Application	
			<	FGB Rate Sheet Funds Vailability	
				Multi-Purpose Signature Card - KY	



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

Options	Branch			
Workstation Settings	Select a Branch *	0001 - Main Branch		~
Print Blank Form	Printers (Optional)			
	Printer Group	Printer Name		
	Platform	eSign Printer		1
	eSign	Snagit 2020 OneNote for Windows 10 OneNote (Desktop) NUL Microsoft XPS Document Mriter		~
		Microsoft Print to PDF		J
		eSign Printer		¥
		OK	Cano	cel

- 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

Updating CSI New Account Console Custom Forms Revised on 11/23/2021 ©2021 IMM All rights reserved Page 6 of 8



m 🖸

6. 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.



7. 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



Edit	
Delete	

8. 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

Delete Document Type Definition		×
You are about to delete document type definition		
bo you want to proceed:		
	🗊 Delete	imes Cancel

9. 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.

- 10. Click Save
- 11. 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.

Updating CSI New Account Console Custom Forms Revised on 11/23/2021 ©2021 IMM All rights reserved Page 7 of 8



Define Document

μοχ ά

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.

DDN	Account Information Signer 1 Name	
Test Value	Test Value	
Font		
Name	Times New Roman	~
Size	11.00 T Bold T Italic	
Location a	nd Size	
Left	89 Top 78	
Width	_351 Calculate Width	1

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.

