

# Document Pricing Guidelines

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## Objective

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The Document Pricing Guidelines provide an itemized list for the types of document/template creations, including base prices and details for all optional services and customizations.

Pricing details are available for following IMM products:

- eSign XML
- eSign Add-ons: Starter Checks and Loan Coupons
- eSign Remote
- eSign RTS
- eChecks
- eReceipts

## eSign XML

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### Document Pricing for New Installations

Special document pricing<sup>1\*</sup> of \$100/page (capped at \$400/document) is available for documents identified by name and itemized on the "Initial Document List." The list needs to be completed within 10 days of signing the eSign software proposal.

Delays in completing this document list will impact the Project Timeline. Please return the completed list to [AdminOps@immonline.com](mailto:AdminOps@immonline.com) for a proposal to be prepared for your signature and include your Project Manager.

This special pricing excludes the "Loan Estimate" and "Closing Disclosure" documents, which will be priced at \$600/document due to their complexity, and any other documents not identified on the initial list.

All documents must be provided to IMM in an unlocked<sup>2\*</sup> PDF, Word, IFD, or Excel file format (includes third-party vendor documents.)<sup>3\*</sup> Additional charges will apply for documents coming to IMM as a hard copy or in other formats. See "[Proprietary Documents](#)" section.

Refer to the sections, "[Guidelines for Ordering Documents with IMM](#)", "[Guidelines for FI to Create and Maintain Documents](#)", and [eSign Document Professional Services](#) for further important details.

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<sup>1\*</sup> Document base price does not include smart document features and customizations.

<sup>2\*</sup> If we cannot convert the source document that is provided to us, you will be notified of the increase in price and your approval will be required to proceed.

<sup>3\*</sup> Third-party documents MUST be sent to us directly from the vendor to AdminOps@immonline.com to ensure IMM has the latest copy of the document.

## Document Pricing for Existing Installations

Documents received as unlocked<sup>2\*</sup> PDF, Word, IFD, or Excel files will be quoted at \$400<sup>1\*</sup>. Third-party vendor documents<sup>3\*</sup> will be quoted at \$400<sup>1\*</sup>. The exception applies to Loan Estimate and Closing Disclosure documents due to their complexity; they will be priced at \$600/document.

## Proprietary Documents

Proprietary documents received in any file format other than XFM (i.e., hardcopy, locked PDF, Word doc, etc.) will be converted to an XFM and formatted/cleaned-up. Proprietary documents (non-copyrighted) will be quoted from \$400<sup>1\*</sup> to \$600<sup>1\*</sup> based on the complexity. Documents over 3 pages will be charged an additional \$30/page to be cleaned-up as a separate revisions line item.

## Third-Party Document Replacements

A third-party vendor document replacement<sup>3\*</sup> received in an unlocked PDF, Word, IFD, or Excel file format will be quoted at \$110/hour with a 2 hour minimum per document. If the document is not covered under annual maintenance, the document will be priced as listed under the section "[Document Pricing for Existing Installations.](#)"

## Document Conversion Only using FormBridge

Conversion of a PDF, Word, IFD, or Excel document to XFM will be quoted at \$30/page for conversion ONLY. This is PLAIN file format conversion (to XFM), and the price will not include any design clean-up, formatting, or field mapping.

## Document Revisions

Revisions include field mapping, design changes, adding new items/logos to a document, and/or adding blank pages for duplex printing. Document revisions will be quoted at \$110/hour if the document is covered under annual maintenance and \$415/hour for documents not covered under annual maintenance. Please ensure that IMM has the latest source file (XFM) for the document requiring revisions. If documents require extensive automation, the time spent to complete the Data Aware Signatures, JavaScripting for mandatory and/or conditional mandatory fields, and any Design Professional Services that are provided throughout the revision process will be billable and included on the invoice once completed.

## Signature Fields - eSign Remote/In-Person

Mapping signature fields with or without Data Aware signature logic will be quoted at \$110/hour if the document is covered under annual maintenance and \$415/hour for documents not covered under annual maintenance. Please ensure that IMM has the latest source file (XFM) for the document requiring eSign Remote signature fields.

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<sup>2\*</sup> If we cannot convert the source document that is provided to us, you will be notified of the increase in price and your approval will be required to proceed.

<sup>1\*</sup> Document base price does not include smart document features and customizations.

<sup>3\*</sup> Third-party documents MUST be sent to us directly from the vendor to AdminOps@immonline.com to ensure IMM receives the latest copy of the document.

### Smart Document Functionality

Smart document functionality includes adding custom JavaScript to support Data Aware Signature, setting up mandatory fields, and/or adding PDF417 barcodes. Smart document functionality will be quoted at \$110/hour if the document is covered under annual maintenance and \$415/hour for documents not covered under annual maintenance. Please ensure that IMM has the latest source file (XFM) for the document requiring smart document functionality.

IMM does not teach financial institutions how to write custom JavaScript; IMM shares common generic examples. If additional help beyond the examples is required, [eSign Document Professional Services](#) is available.

**Important Note:** IMM eSign will be moving to a browser-agnostic environment. As part of this migration, we will be adding smart document abilities that will replace the vast majority of what was previously performed using JavaScript or expression building. Please contact IMM Support for guidance on how to proceed with your smart documents.

### Custom eSign Style Sheet (FISpecificXSL/Descriptions.txt)

The FISpecificXSL/Descriptions.txt style sheet can hold custom programming and create custom fields based on the availability of data. These custom fields can be used on all documents versus placing custom JavaScript on each document. IMM does not teach financial institutions how to write custom programming for their FISpecificXSL. However, with [eSign Document Professional Services](#) IMM can teach a financial institution how to create and maintain a Descriptions.txt file. The price to create or revise custom fields in the FISpecificXSL style sheet or Descriptions.txt file will be quoted at \$110/hour.

### Creating/Adding New Data Fields for Automation

Creating/adding fields in a host system data dictionary enhances documents by auto-populating data without the need for JavaScripting and Expression Builder. These new fields can be used on all documents. The process to add new XML data fields will require gathering information, development, and testing. All time spent to create/add new fields will be quoted at \$110/hour.

### Barcode Coversheets

Barcode coversheets used to generate PDF417 Barcode and/or Attachment coversheets used for attaching a PDF or scanning an ID to meet on-demand needs will be quoted at \$110/hour with a 2-hour minimum and annual maintenance charged.<sup>4\*</sup>

### Duplicate Documents or Additional Pages

Duplicate documents or additional pages to support unique business needs will be quoted at \$110/hour if the original document is covered under annual maintenance and \$415/hour for documents not covered under annual maintenance. The newly created duplicate document will be added to annual maintenance.<sup>4\*</sup>

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<sup>4\*</sup> Annual maintenance will be billed based on the original price (\$400-\$600.) Refer to the "Annual Maintenance (AM)" section.

## Host System Conversion

If an existing eSign customer is converting their core or loan origination system (LOS), design work needed for the new system will be quoted at \$110/hour for documents covered under annual maintenance and \$415/hour for documents not covered under annual maintenance. IMM's AdminOps Coordinator will provide an "Initial Document List" spreadsheet listing all documents currently covered under annual maintenance. Please add to the list those documents you want to have covered for your new core or LOS and delete those that pertain to your old core or LOS. If there are any additions, please send us the latest source files (XfMs) for our field re-mapping process. Document orders will be invoiced once the revision process has been completed. Additional charges will be assessed for Data Aware Signatures, JavaScripting for mandatory and/or conditional mandatory fields, and any Design Professional Services that are provided throughout the revision process. An additional order will be required for any consultative services that you request to evaluate new business system requirements and/or rewriting criteria conditions to meet expectations of your new system.

## eSign Custom Platform (Dictionary Type)

Adding custom platform (dictionary type) to eSign XML will be quoted at \$415/hour. Upon receipt of the signed proposal, the engagement will be scheduled to perform the installation on your eSign server. The custom dictionary type will allow fill-from-screen type documents to keep a consistent naming convention (i.e., HR documents, Expense Reports, etc.).

## eSign Documents Professional Services

The LiquidOffice Training Class is an essential first step in producing eSign documents for use with your specific business applications and in line with your business practices. However, document design and mapping must take into account many factors, including the FI's internal policies and procedures, the availability and format of data from your business applications, the changing government regulatory environment, and security guidelines.

As a result, if you have questions or have run into issues while designing and mapping specific documents, IMM offers eSign Documents Professional Services. As part of this service, an experienced designer will engage with FI personnel to get a sense of your business needs and understand the challenges that have been encountered. The IMM designer will offer suitable solutions to enable you to go live with your eSign documents.

This consulting service is NOT a replacement for the training class but rather an additional service offered to address your FI's specific challenges. The experienced designer will NOT map a document during this session; they will explain how to map for specific scenarios and share best practices wherever applicable. These scenarios may be related to:

### *Business Procedures and Processes*

- How will my FI's business requirements affect the design and mapping of my eSign documents?

### *Business Applications*

- How will the type and format of data available in the XML affect the use of my eSign documents?
- My FI is changing our core or LOS – how will I need to update my documents to work with the new system?

### *Mapping Reference File (Descriptions.txt)*

- What is a mapping reference file and how does it relate to document design and mapping?

- How to configure field mapping within a session and how does it help to auto-populate data on my eSign documents?
- How can I configure descriptions.txt to take advantage of session-based mapping?  
*Custom JavaScript*
- When should JavaScript be used? (The answer is ONLY for Data Aware Signature.)
- If my documents use custom JavaScript for other purposes, what are some other tools I can use to achieve the same effects?

The eSign Documents Professional Services is scheduled remotely, one-on-one with an experienced designer and no more than two individuals from the Financial Institution. The request can be submitted via email to [AdminOps@immonline.com](mailto:AdminOps@immonline.com) for a proposal to be prepared. The time is billable at \$415/hour in 30-minute increments with a \$210 minimum. An email recap of the items discussed, and the solution(s) provided will be shared with the customer at the end of every call (if used with multiple scheduled engagements.)

For an effective engagement, IMM recommends that you collect all document implementation-related challenges, issues, or questions in advance and list them out in either a Word or Excel file. The experienced designer will go through each challenge, issue, and question and will provide thorough training, explanations, solutions and/or best practices.

## eSign Remote

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### **eSign Remote - Web Form**

Creating a Web Form is billed at \$415/hour and the source file must be provided.

## eSign RTS

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### **RTS Template Creation**

New RTS templates will be priced at \$200 each. Annual maintenance for these templates will be based on the standard \$400/document base fee.

Revisions or replacements will be quoted at \$110/hour if the template is covered under annual maintenance and \$415/hour for templates not covered under annual maintenance. The collection of all source files by your assigned Designer for revision or replacement orders will be included in the hourly billing.

## eSign Add-ons: Starter Checks / Loan Coupons

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### **Starter Checks Templates and Additional Designs**

The new installation of Starter Checks includes one template. The template<sup>1\*</sup> will be added to annual maintenance using a base price of \$500.

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<sup>1\*</sup>Annual maintenance will be calculated at 20% of the base price. Refer to the "Annual Maintenance (AM)" section.

Additional templates<sup>1\*</sup> that are received *during or after* the initial installation will be quoted at \$110/hour with a base price of \$500/template.

Additional customization/revision work will be quoted at \$110/hour.

For details related to Proofing Phase, Delivery and Warranty, see [Checks/Coupons Template Proof, Delivery, and Warranty](#)

### **LoanCoupons**

The new installation of Loan Coupons includes one template. The template<sup>1\*</sup> will be added to annual maintenance using a base price of \$500. Loan Coupons only support one template design.

Additional customization/revision work will be quoted at \$110/hour.

For details related to Proofing Phase, Delivery and Warranty, see [Checks/Coupons Template Proof, Delivery, and Warranty](#)

### **eChecks**

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#### **eChecks Templates and Additional Designs**

The new installation of eChecks includes a standard check template for the following check types (produced from your Core System) - Official/Cashier/Teller, General Ledger/Expense, or Loan. The standard check template<sup>1\*</sup> will be added to annual maintenance using a base price of \$500.

Custom check types<sup>1\*</sup> (Money Order, Audio Response, Batch, Shared Branch, Escrow, or Starter Checks - only if core generates data to print) will be priced at \$500 for each custom check type.

Third-party check templates<sup>1\*</sup> will be quoted at \$1,500.

Additional checks templates<sup>1\*</sup> that are received *during or after* the initial installation will be quoted at \$110/hour with a base price of \$500/template.

Additional customization/revision work will be quoted at \$110/hour.

For details related to Proofing Phase, Delivery and Warranty, see [Checks/Coupons Template Proof, Delivery, and Warranty](#)

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<sup>1\*</sup>Annual maintenance will be calculated at 20% of the base price. Refer to the "Annual Maintenance (AM)" section.



## Checks/Coupons Template Proof, Delivery, and Warranty

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### Template Proofing Phase

The designer will email a proof of each template of Checks/Coupons. The proof is submitted for approval of all text, graphics, and general content. Every effort will be made to create the proof accurately, however, we request that you review the proof carefully to ensure the accuracy of:

- Spelling
- Graphics
- Routing and transit numbers (when applicable)\*
- Account numbers (when applicable)

We will not proceed until we receive an email confirmation of proof approval.

Each template delivery includes a 10-day proofing stage. Corrections will be completed at no additional charge but any revisions beyond the original scope of the request will be billed at the quoted hourly rate. All template revisions will be billed 10 days after delivery of the proof.

### Template Delivery and Rush Fees

Standard delivery time is 30 days from the day the signed proposal is received. Delivery can only be promised if all necessary items have been submitted with the signed proposal (i.e., signature image, account number, data file, and any other information required to complete the revision).

A rush delivery fee will be charged to orders as follows: delivery in one week – 40%, delivery in two weeks – 30%, delivery in three weeks – 20%. Rush charges are calculated based on the total amount of the order.

### Template Warranty Period

The template of Checks/Coupons includes a 45 day warranty period from the live date. Corrections will be completed at no additional charge, but any revisions beyond the original scope of the request will be billed at the quoted hourly rate. A new proposal will be required for all changes/revisions beyond 45 days from the live date.

## eReceipts

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### eReceipts Template Revisions:

Template revisions in eReceipts 7+ will be quoted at \$110/hour.

### eReceipts Logo

Logo and name changes can be performed without IMM's involvement. If IMM's assistance is requested, a proposal will be quoted at \$110/hour.

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\* MICR gauge required to confirm proper alignment.

### IMM eReceipts Logo Specifications

The following Logo specification should be used when adding a logo:

Spec Name	Spec Detail
File Name	TeRLogo1.jpg and TeRLogo2.jpg
File Size	317 x 152 pixels with Resolution 203 dpi
Bit Depth	24
Color/Tone	Grayscale
Server File Location	\\IMMeReceiptsServer

## FI's Logo/Name Change Impact on IMM's Software Products

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If your FI undergoes a logo and/or name change and IMM's assistance is required, please email [AdminOps@immonline.com](mailto:AdminOps@immonline.com) to start the process.

Logos should be provided in a high-quality TIFF or PCX format (JPEG is also acceptable only if TIFF or PCX are not available.)

- eSign Documents: If your FI is maintaining their own documents but would like to contract the work out to IMM, please provide a list of the documents you would like updated along with the current XFM. If IMM maintains your documents, we will provide you with a list of your active documents and request your confirmation of which documents require updating.
- Starter Checks/Loan Coupons (eSign Add-ons): IMM will provide a proposal for updating your active templates based on their annual maintenance status.
- eChecks: IMM will provide a proposal for updating your active packages based on their annual maintenance status.
- eReceipts: See "[eReceipts Logo](#)" above.

## Guidelines for Ordering Documents with IMM

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### Third-Party Copyrighted vs. Proprietary Documents

IMM follows two different processes for creating LiquidOffice files depending on whether the source files are created by a third-party vendor or by your FI. The IMM term for FI-created documents is “proprietary documents.”

- Third-party, copyrighted files are imported into LiquidOffice using the “New Form from PDF” feature within LiquidOffice to create an XFM. The document layout is imported as a background image and the document designer places fillable fields on top of that image.

The text on such XFM files remains un-editable, which prohibits any changes to the layout of the document. This method prevents anyone with access to the XFM file from unknowingly violating the text of the third-party’s copyrighted document.

- Proprietary documents are created using the FormBridge Conversion Tool or can be created from scratch in LiquidOffice. The conversion tool can convert PDF, Word, IFD, and Excel files to the LiquidOffice file format (XFM). The IMM designer edits, cleans, and arranges the text on the XFM to match the source file as closely as possible. The text on these XFM files remains editable which allows for text or design changes.

This method allows the FI to build a library of editable source files in one format (XFM), rather than having multiple copies of documents saved in various formats (PDF, Word, IFD, Excel, etc.) which must be maintained along with any XFMs.

### Expectations of Documents Created by IMM

IMM’s designers map all the fields according to their knowledge of your business application. Each designer finds field mapping using the field data dictionary.

However, the mapping of certain fields is unique to the FI’s business requirements and default system values which can only be configured during the testing/revision process.

When a document is tested in the FI’s environment, the document MAY not auto-populate with all expected information. In those cases, IMM will work with your FI to complete/fix the mapping.

### Approval Process of Delivered Documents

Delivered documents may need additional revisions depending on business requirements, (see [“Expectations of Documents Created by IMM”](#)). The approval process is completed in three stages and requires collaboration between the FI and the IMM designer:

#### Stage One: Document Testing by the FI

1. FI to upload documents in eSign under appropriate dictionary type.
2. FI’s document tester should test the document(s) using the appropriate business application (i.e., LOS or Core).
3. All testing feedback is to be documented using the “Document Testing Template” provided in the initial order email.
4. Once the document has been tested, feedback should be emailed to the IMM designer.

**Stage Two: Document Revision by the IMM Designer**

1. IMM designer will review feedback received and will set up a call if necessary to collect or clarify the information.
2. IMM designer will either make the requested revises and provide an updated PDF or will provide another solution to accommodate request.

**Stage Three: Testing of Updated Documents and Order Approval**

1. FI implements the solution(s) provided by the IMM designer, including updating system files and/or testing any updated PDFs provided.
2. FI approves the documents or provides additional feedback to IMM if needed.

Keeping this revision process in mind, the FI must set two dates when placing an order.

1. **Expected Delivery Date** – this is the date that the FI expects the IMM designer to complete the initial design work and deliver the documents.
2. **Expected Approval Date** – this is the date that the FI expects to begin using the documents in production.

This date should take into account:

- The time and resources needed to test at the FI and provide feedback to IMM.
- The time needed for IMM to complete any requested revisions.

Please allow a minimum of 1-2 weeks to complete the revision process when determining the “Expected Approval Date”.

Larger orders and/or more complex documents may require additional time for both testing and revisions to be completed. In those cases, IMM will work with the FI to set reasonable expectations.

Weekly meetings can be scheduled to review and troubleshoot document mapping. The FI and IMM designer will work together to establish an “Expected Approval Date” and plan to work towards that date.

**Collecting Documents to Place an Order**

The latest version of all third-party vendor (copyrighted) documents MUST be sent to [AdminOps@immonline.com](mailto:AdminOps@immonline.com) directly from the vendor. Review the documents in advance with your third-party vendor to ensure the accuracy of the content as well as the default information that should auto-populate into the appropriate document fields. Source files for proprietary documents (non-copyrighted) should be provided directly from the FI.

Ensure IMM has the latest version of your FI's logo and any other information that the documents should contain.

eSign allows you to process more than one document on-demand. It also allows you to create document sets (packages of documents) in advance that will then be automatically selected based on product type, transaction type, or other business rules. IMM does not create these document sets, but your system administrator will be trained on how to create them during the installation training. If you are a current user and do not understand how to create document sets, please contact our Support Department for assistance.

Please check your document list to ensure that you have not placed an order for documents where different documents have been merged/packaged as one document or the same document is listed multiple times.

### **Changes Requested on Documents that are In-Process or Delivered**

If you want changes made to the design of your documents during the proofing stage that were not included in the original specifications of the job, additional charges may apply.

If the document work is in process or has been completed according to the proposal and you decide to cancel the request, all time accrued is billable.

### **Standard Delivery and Rush Fees**

Standard delivery time is 45 to 90 days for documents from the day the signed proposal is received.

A rush delivery fee will be charged to orders as follows: delivery in one week – 40%, delivery in two weeks – 30%, delivery in three weeks – 20%. Rush charges are calculated based on the total amount of the order. The acceptance of a rush request is dependent on the volume of orders currently in queue.

Delivery can only be promised if all the necessary items have been submitted with the signed proposal. Documents delivered may need additional revisions depending on the business requirements, see [Expectations of Documents Created by IMM](#).

### **Warranty Period**

Existing Customers: 45 days from Delivery Date

New Customers OR Conversions: 45 days from Live date

The warranty period only covers document field mapping or modifications within the original scope of the order. Any corrections or modifications to the source document, including changes from your forms vendor, that fall outside of the original scope of the order will not be covered under warranty and a new proposal will be required.

### **Annual Maintenance (AM)**

AM can be part of your disaster recovery plan. In the event of a disaster, IMM will provide document replacement via e-mail or FTP link for download.

AM also provides for document revisions, workflow enhancements, and changes/replacements required by your third-party vendor and/or data processor at the reduced annual maintenance rate of \$110/hour. The non-annual maintenance hourly rate is \$415. You are also eligible for unlimited telephone support during normal business hours.

AM is calculated at 20% of a document's base price, which can range from \$400 to \$600 depending on the document. AM is non-refundable.

### **Adding Documents on Annual Maintenance**

When the volume of documents or availability of resources make it difficult for a FI to keep up with document updates, adding documents to AM can offer a solution.

Updates to documents may be required due to:

- Changing business requirements
- Rebranding (logo or name changes)
- eSign document updates due to eSign upgrade
- Regulatory changes that affect document design, layout, and/or content
- Core or LOS conversion

Documents can be added to AM at any time. The annual fee will be calculated at 20% of a document's base price, which can range from \$400 to \$600 depending on the document and will be charged for the full calendar year.

To place documents on AM, email [AdminOps@immonline.com](mailto:AdminOps@immonline.com) and a spreadsheet will be sent to collect the required information on your documents.

FI should:

1. Complete the spreadsheet, including the current file name (according to the file name of the uploaded PDF within eSign). The FI should review the list to only keep in-use documents to avoid duplication.
2. Provide XFM and PDF using the current file name. The FI should make every effort to locate the latest XFM/PDF files - To locate the XFMs on the FI Employees workstation, login with the FI employee's workstation and search the C or E drive. Also search any preferred network locations where XFMs could be saved. Be aware of the following if the FI is unable to locate the XFM file.
  - a. The FI should update the spreadsheet so appropriate methods can be followed to collect the source files depending on third-party or proprietary documents.
  - b. IMM may have to create it as a new document and will be priced accordingly. See "[Document Pricing for Existing Installations](#)" for additional details.
  - c. The FI should provide the latest PDF from the eSign server's Inetpub\wwwroot\TeAASPFiles\FI2\SourcePDFs folder, so it can be used as a reference point for mapping.
3. Each XFM/PDF should be filed in a folder according to their dictionary type. Create a zip file of each folder and email to [AdminOps@immonline.com](mailto:AdminOps@immonline.com) along with the completed spreadsheet.

## [Guidelines for FI to Create and Maintain Documents](#)

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### **LiquidOffice Form Designer - Document Preparation Training Class**

A virtual four half-day training class is available and strongly recommended for any FI that is interested in designing and maintaining their documents. The class will include training on creating documents in LiquidOffice Form Designer with attendees designing and mapping documents, including best practices for customizing and building document design concepts.

Setting up dynamic, intuitive document sets, map signature fields for in-branch and remote signatures, add eSign objects, add default script and mandatory fields using the JavaScript Code Generator, and import pre-existing PDFs will also be covered. A demonstration of document conversion and the "JavaScript Lab," which shows attendees how to use the Expression Builder/JavaScript will also be covered.

Attendees will have the ability to download expressions and JavaScript examples of practical applications that existing FIs have used to streamline document processing. The entire training

class is hands-on and features a technical and operational “How-To” which is a necessity for FI personnel who plan on creating or maintaining documents for eSign and/or eSign Remote.

The cost is \$1,800.

### **LiquidOffice Form Designer Software**

LiquidOffice Form Designer Software is \$1,500/workstation with an additional \$300 mandatory annual maintenance fee for the first year.

Beginning in the second year, the FI will be notified and invoiced the \$300 annual maintenance fee to keep their software license current. Annual maintenance includes support directly from the vendor pertaining to service packs, point releases, and upgrades.

It is strongly recommended that you keep your license current on annual maintenance to be eligible to receive software updates as they are released.

### **JavaScript Code Generator(JSCG)**

A license is required for each workstation running the JSCG software. The initial software license fee is \$150 and all upgrades, including upgrading your existing license to support a multi-host environment, will be billed at \$50/license.

JSCG gives you the ability to generate the JavaScript code required for eSign documents.

JSCG Features are:

1. Duplicate Fields – allows fields that appear multiple times to carry over data to all related fields throughout the document.
2. Repeated Fields – allows you to identify identical field names before generating the JavaScript code.
3. Mandatory Fields – allows you to set required fields within your documents.

**Important Note:** IMM eSign will be moving to a browser-agnostic environment. As part of this migration, we will be adding smart document abilities that will replace the vast majority of what was previously performed with JavaScript or expression building. Please contact IMM Support for guidance on how to proceed with your smart documents.

### **LiquidOffice Form Designer Training Manual – Annual Subscription**

The LiquidOffice Form Designer Training Manual is a proprietary document, created and copyrighted<sup>2\*</sup> by IMM to teach the basics of LiquidOffice, eSign form design, and provides all critical information that impacts the eSign solution.

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<sup>2\*</sup> The training manual is the sole property of IMM and is considered IMM Confidential under the terms of our Software License, Services, and/or License Agreement. Additional copies must be purchased from IMM and cannot be reproduced or distributed without IMM's explicit consent.



The manual is continuously updated to provide the latest information and offers:

- General information about supported objects of LiquidOffice
- Step-by-step instructions for basic form design
- Best practices for creating/maintaining eSign documents
- Interactive Learning Exercises along with example XFM/PDFs
- Information about using the latest version of eSign feature and its impact on eSign documents
- Information about using older supported versions of eSign
- Guidelines for updating/maintaining Descriptions.txt
- Instructions for using JSCG using exercises
- Instructions for writing criteria and widely used examples
- JavaScript Training for Data Aware Signatures and Manually Editing JavaScript along with XFM/PDF examples
- Information on configuring locked/unlocked fields for Remote or In-Person Signing

IMM highly encourages a FI to subscribe for the LiquidOffice Form Designer Manual Program and in doing so will have access to the latest information about eSign and document design practices which will save the FI time and ensure resources are being utilized efficiently during the eSign implementation. The FI can also use the manual for internal cross training of other employees at the FI.

The manual also includes document design guidance and how documents can be mapped for eSign using Field Data Dictionary and various features of eSign. Without access to the information in the manual, the FI may have to rely on eSign Document Professional Services which is an additional charge based on the time spent with one of the IMM's experienced designer.

- The annual subscription will entitle you to receive major and minor updates of the training manual throughout the year, as updates are made available. The annual subscription fee of \$125 is billed every October for the upcoming calendar year. You may choose to subscribe at any time and the annual fee will be pro-rated accordingly.
- The annual subscription provides 1 copy only. Additional copies can be purchased at any time for \$50/copy.
- Purchasing the manual without joining the annual program is \$195/copy.

Please complete the order form on our website (Browse to Resources – LiquidOffice) to receive your initial invoice and FTP link. For all releases, an email will be sent containing a FTP link to download the current manual.