

Implementation Customer Profile

Welcome to the IMMesign family. We appreciate your confidence in our company and our eSignature & Digital Transaction solutions and look forward to working with you to power the digital strategies and initiatives you have established for your institution.

This Customer Profile Form helps us gather key information vital both to the implementation process and for the ongoing management of the relationship between IMM and your institution for years to come.

Please complete the form by providing the information requested. The completed form must be returned prior to the scheduling of your kick-off call.

There is a section at the end of the form that will provide guidance on elements that may be confusing. However, if you should have any questions as you work through the form, please do not hesitate to contact your IMM Solutions Consultant or your IMM Implementation Project Manager.

Institution Information

Institution Name

Street Address

City, State & Zip

Asset Size

Website URL

Institution Logo

- PNG File format: 60px tall x 200px wide
- Please email promptly to your IMM Project Manager

Number of Branches

Number of Employees

Product Purchased IMM eSign Cloud Version:
Please complete if known

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Key Institution Personnel & Contacts

Role: Purchaser

Name:

Title:

Phone:

Mobile:

Email:

Role: Project Manager

Name:

Title:

Phone:

Mobile:

Email:

Role: Billing Contact

Name:

Title:

Phone:

Mobile:

Email:

Role: IT

Name:

Title:

Phone:

Mobile:

Email:

Is this a 3rd Party Vendor:

If Yes, Indicate the Company:

Role: Document Administrator

Name:

Title:

Phone:

Mobile:

Email:

Role: Product Administrator

Name:

Title:

Phone:

Mobile:

Email:

Role: Training Resource

Name:

Title:

Phone:

Mobile:

Email:

Role: Financial Platform Project Manager (indicate point of contact for platform vendor)

Name:

Title:

Phone:

Mobile:

Email:

Additional Information

For example, note who will be serving as remote signing (Adobe) portal administrator, etc.

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Primary Business Systems

	Live	Hosted	Use with eSign
Core Financial System			
<hr/>			
Loan Origination System(s)			
<small>(Please name all, See Notes for important information)</small>			
<hr/>			
Account Opening System			
<hr/>			
Mortgage Origination System			
<hr/>			
Imaging/ECM			
<small>(System(s) you use to store Document Images for archival purposes—See Notes for important information)</small>			
If using FiServ Director or Nautilus – have you purchased DIP?			
If using CenterDoc – do you have an SFTP connect?			
<hr/>			
Index/Search Keywords			
<small>(The primary indexes used in the Imaging/ECM system(s) for common searches)</small>			
<hr/>			
Doc Provider			
<small>(If not above, name of separate doc provider for compliance documents if applicable)</small>			
<hr/>			
Additional Systems			
<small>(Other key business systems not listed above)</small>			
<hr/>			
What is the 1st priority Business System or Department for the initial implementation. Please describe the process or activity.			
<hr/>			
<hr/>			
Desired or required go-live date			
<small>(If applicable, please use format mm/dd/yyyy)</small>			

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IT Infrastructure and Environment Information

Workstation Type Standard Windows Desktop PC Thin Client Combination

(Be sure to complete Workstation Information section below)

Number of Workstations for eSign

In-Person Signing Devices

Make:

Model Number

(If applicable/known)

If Yes, Owned or Purchasing

[Additional Information](#)

Relating to your in-person/in-branch signing strategy

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Workstation Information

Installer will need to be logged in to workstation(s) as an Administrator.

Workstation Operating System Include Version if standardized

Internet Browser & Version

Thin Client Information	Citrix:	Version:
	RDP:	OS:
	VMWare Horizon:	Version:

(If applicable/known)

Number Thin Client Servers

Number Thin Client Workstations

Additional Information

Please share any unique details about your workstation environment

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Institution Administrators

Specify two Admins for the Adobe eSign and Microsoft Azure portals. These individuals will have the ability to create remove users and elevate users access. Additional Admins can be created after the eSign training session(s)
Do not enter any confidential password information.

Name

Email

Domain User ID

(DO NOT provide password)

Name

Email

Domain User ID

(DO NOT provide password)

Microsoft Azure Information

IMM eSign Cloud solution utilizes your institution's existing Microsoft Azure AD for authentication. If you are currently utilizing Microsoft Office365 you most likely have existing Azure AD credentials and the connection is very simple. Your IT resource should know who the Global Administrator (GA) is for your Azure AD domain. If you are unsure about any of this, please leave this section blank and we will discuss it during the kick-off call.

Do you currently use Office365?

Currently have MS Azure AD accounts?

If Yes, please provide the following

Azure Active Directory Domain Name

(Active Directory Sync is a sufficient service for this authentication)

Azure Global Administrator (user name only)

(During the eSign installation, IMM will provide a URL for the institution's Azure Global Administrator to consent. This task is only required for the initial consent. IMM eSign will not capture or retain the Global Administrator or user passwords.)

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Additional Information and Notes

The information below is provided to assist you with the completion of the Customer Profile form. If you have further questions, please do not hesitate to contact your IMM Account Representative or your Implementation Project Manager.

Institution Information Section

Institution Logo

Please supply your institution logo in PNG file format: 60 pixels tall x 200 pixels wide by emailing it directly to your IMM Implementation Project Manager

Key Institution Personnel & Contacts

Please use this table to provide the requested information for the individuals at your institution who will fit into each of the various roles identified. If there are additional key personnel, you can enter them and their expected role in one of the open rows. Feel free to provide additional key contact information or other relevant information regarding contacts in the Additional Information field.

Primary Business Systems

Live/Hosted/Use with eSign

Please select Yes or No in these fields for each identified system to indicate whether this system is **Live**, if it is **Hosted** (as opposed to on-premise), and if you intend to **Use it with eSign**.

Please name all Loan Origination systems if you leverage multiple for different loan types (Consumer vs. Commercial, etc).

Note 1: If you are using LaserPro, please remember to acquire the ProSign Export Module for IMMeSign from your Finastra rep.

Loan Origination

Note 2: If you are using Compliance One, please indicate if you are using it for Consumer Lending and/or Mortgage Origination.

Note 3: If your documents are dynamic in format, meaning that the content and location of signature fields can shift from loan to loan based upon specific loan criteria, please indicate so.

Imaging/ECM

What is the system(s) you use to store Document Images for archival purposes that will be interfaced with IMM eSign. If you use multiple systems – please name all and their specific use (i.e. System A: Loans, System B: Deposits).

Note: If you are using Fiserv Nautilus or Director, or Hyland OnBase, please indicate if you have the Document Import Processor (DIP) module. If not – you will need to acquire this module from your Fiserv or Hyland representative.

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IT Infrastructure and Environment Information

Workstation Type Thick clients are simply standard Windows Desktop PCs. If you use Thin Clients, note that there is additional information requested below.

Number of Workstations for eSign What is the estimated number of Institution workstations that would be using IMM eSign.

In-Person Signing Devices Yes/No field – Have you established what devices you will use for in-person/in-branch signing of documents? If so, please indicate what type of device in this field including the Make and Model # as appropriate.

Workstation Information

Number Thin Client Servers If applicable, how many thin-client servers exist in your environment?

Number Thin Client Workstations If applicable, how many thin-client workstations are in your environment?
