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eSign

eSign XML (Product IDs: 8207, 13011, 13505, 13514)

IMM eSign XML is a browser-based document presentment application. All fields that were not populated from the business application can be 'filled from screen' so that the document(s) can be completed electronically. IMM eSign includes an enterprise license with unlimited client access and empowers the financial institution employee to prepare loan or other consumer related documents quickly. Additionally, documents signed or unsigned can be held in a queue for eSignature at a later time and/or location. Documents that require signatures are able to be signed by the consumer by typing their signature, using a signature pad/tablet, iPad, or Windows 8/10 Surface Pro tablet. Document(s) are stored as a 128 bit encrypted, non editable PDF that can be indexed and stored in the financial institution's ECM archival system. The manual filing, storing paper, and/or physical scanning and indexing is eliminated. An additional testing/training server license included for on-premise installations only. Onsite installation, travel expenses, document work, and hardware are not included and are billed additionally.

eSign RTS (Product IDs: 8204, 13507, 13513, 17035)

IMM eSign RTS provides financial institutions with a method to have documents reviewed and signed electronically in-person. Additionally, documents signed or unsigned can be held in a queue for eSignature at a later time and/or location. Documents that require signatures are able to be signed by the consumer by typing their signature, using a signature pad/tablet, iPad, or Windows 8/10 Surface Pro tablet. Completed document(s) and the event audit trail are stored as a 128 bit encrypted, non editable PDF that can be indexed and stored in the financial institution's ECM archival system. An additional testing/training server license included for on-premise installations only. Onsite installation, travel expenses, document template creation, and hardware are not included and are billed additionally.

Professional Services--eSign Plan* (Product ID: 7000-006)

This professional services package provides a comprehensive on boarding of clients which includes the installation of software, configuration of system according to the financial institution's requirements, system testing, system administration training, and end user training performed in a "train-the-trainer" environment. This onboarding package is provided to interface and setup one business system with the expectation that through the onboarding process, the financial institution's staff will be acquainted with all aspects of system setup and will be able to perform additional business system setup to work with IMM eSign as desired.

Additional System Interface (XML OR RTS) (Product ID: 1117, 1121)

Integrates your existing eSign license to an additional business system. Additional document charges may apply.

Additional Server License (XML OR RTS) (Product ID: 13010, 17024)

eSign additional server license provides for additional and/or multiple licensed server(s) for business continuity purposes and/or for a training environment at a financial institution.

* Please note: If you are more than 15 minutes late or a "no show" for a scheduled appointment (i.e., project call, installation, etc.) without providing IMM 24-hour advance notice, the appointment will need to be rescheduled and the original block of time allotted for you will be billed in 4-hr increments at the current published rate.

Host System Conversion (XML OR RTS) (Product ID: 1115)

Connects your new host to your existing eSign software. There will be an additional charge if documents need to be remapped or if document templates need to be created. Please refer to our [Document Pricing Guidelines](#) for additional information. There will also be additional charges for the following: defining permissions on workstations, assisting with the deployment of client components, client installations, backing up or taking snapshots of servers, staff training, and weekend/after-hours dedicated support to bring new systems live.

Optical eSign ConnectIT Interface (Product ID: 1216)

This interface provides for archived eSign documents to have seamless and direct access into the DataSafe Optical imaging platform. Please contact your host system client partner to confirm you have all the requirements for this interface.

Add-ons**Loan Coupon Generator (Product ID: 13040)**

eSign Loan Coupon Generator creates loan coupons on demand using a laser printer and blank perforated paper. Coupons are printed in a special tear-down order for easy collation. eSign Loan Coupon Generator provides coupon books in real time, eliminating the cost of delivery via mail and the convenience of providing the member the coupon book at the time of loan closing.

Starter Checks (Product ID: 13041)

eSign Starter Checks provides personalized temporary/starter checks to new or existing financial institution members on demand via a laser printer. Checks print on blank stock security paper eliminating the risks of storing blank checks.

eSign Remote**eSign Remote (Product IDs: 8202, 8203, 8204, 8207, 13513, 13514)**

IMM eSign Remote provides financial institutions with a safe and secure method to have documents reviewed and signed remotely. Completed documents with signing event audit trails are indexed and archived into the financial institution's imaging/ECM system. The remote signer capability provides financial institutions with a way to have consumers authenticated before being allowed to view and/or sign documents. Authentication can occur via email verification, share secret password authentication, phone/text authentication, knowledge based authentication (KBA), and Government ID verification. Please note that usage charges will be incurred for the phone/text, KBA and Government ID authentication services regardless of whether the recipient succeeds or fails the authentication process.

Additional Remote Channel (Code 13513)

The additional channel provides financial institutions with a safe method to send electronic documents securely via a secure internet connection.

Remote Signing for Lights-Out (Codes 8204, 8207, 13513, 13514)

Lights-Out is IMM's term to give the ability to consumers to sign documents associated with an account opening or loan origination transaction online and in session when a financial institution is closed.

Video/Text Banking Channel Connector (Code 8215)

Video/Text banking collaboration software helps financial institutions connect with their consumers and enable highly-engaged interactions for personalized service opportunities. The Video/Text Banking Channel Connector provides the ability to copy and paste an IMM eSign Remote URL into the user interface delivering eSignatures. This channel provides consumers with the ability to eSign inside the

Video/Text Banking Solution delivering the power and security of IMM eSign in an additional channel. IMM eSign Remote subscription required.

eSignPlus

eSignPlus (Product IDs: 18045, 18048)

IMM eSignPlus allows you to utilize automated workflow to control document and eSignature processes so that they occur in precise accordance with your established business policies and/or regulatory requirements. IMM eSignPlus proactively pushes the right task to the right person at the right point in time to create a highly-optimized and efficient environment in which activities are completed in minutes or hours verses days/weeks. Additionally, IMM eSignPlus gives you expanded control over key processes and tasks to make sure they happen each and every time – without human oversight. Finally, IMM eSignPlus automatically stores completed document sets with their indexes into your imaging/ECM solution without any human intervention. IMM eSignPlus supports 1 Concurrent Workflow Builder and 1 server license.

Block of Hours (Product IDs: 7000-111, 7000-112)

eSignPlus block of hours (20 or 40) can be used for analysis of eform/eworkflow requirements, implementation of eform/eworkflow and required business logic, testing of eform/eworkflow and training of eform/eworkflow logic.

eSignPlus 5-pack User License (Product IDs: 18007)

Additional concurrent licenses (sold in packs of 5). Requires IMM eSignPlus base software.

Web Forms to Workflow (Product ID: 18053)

Web Forms are web-hosted eForms that are easily created and placed on a financial institution's website where consumers can "on-demand" complete, sign, and submit forms to the financial institution for processing. Once a form is submitted to the financial institution, it is automatically placed into the designated IMM eSign workflow to route and manage the appropriate business processes as defined within the financial institution's eSign workflow parameters. Web Forms to Workflow includes remote installation, creation of one Web Form to Workflow solution and training on how to build web forms and workflows. The installation and training includes up to three remote days of professional services. Requirement eSign and eSign Remote.

eChecks

eChecks (Product ID: 13207)

eChecks prints credit union official, online, and batch checks on blank security stock paper. Transactions are generated on the host system. Data is dropped to the financial institution's local server and then merged into an encrypted check template, digitized signatures applied based upon financial institution's pre-defined logic, and then printed to a laser printer. eChecks allows for a indexed PDF to be created and stored for archival purposes. eChecks includes unlimited print stations.

Optical eChecks ConnectIT Interface (Product ID: 3116)

This interface provides for archived eChecks to have seamless and direct access into the DataSafe Optical imaging platform. Please contact your host system client partner to confirm you have all the requirements for this interface.

Additional Server License (Product ID: 13210)

eChecks additional server license provides for additional and/or multiple licenses for business continuity purposes or for a training environment at a financial institution.

Host System Conversion (eChecks) (Product ID: 3115)

Connects your new host to your existing eChecks software. There will be an additional charge for all check packages that need to be remapped. Please refer to our [Document Pricing Guidelines](#) for additional information. eCheck template orders will be invoiced when the revision process has been completed. There will also be additional charges for the following: assisting with adding and associating check printers, staff training, and weekend/after-hours dedicated support to bring new systems live.

Starter Checks Offline Check Module (Product ID: 13204)

The offline module prints offline checks (teller and cashier checks) on blank security stock paper when the core system is non-operational. Security logins are required to access eChecks Offline Check Module. Consecutive check numbering is defined by the financial institution and transaction data is filled-from-screen then printed to a laser printer. This offline module includes an audit database to track all checks generated in the offline mode and an indexed PDF can be created as the financial institution's check copy for archiving. The Starter Checks Offline Check module prints temporary/starter checks on blank security stock paper and allows a financial institution employee to fill-from-screen the required information to provide personalized temporary/starter checks to new or existing members on demand via a laser printer.

Offline Check Workstation Module (Product ID: 13206)

eChecks Offline Workstation Module is an add-on to the eChecks Offline Module that provides a distributed check printing solution to enable check printing from a local branch workstation to any local printer in an offline manner without requiring a connection to the main eChecks server. This module prints checks to any Windows laser printer that is accessible either via a direct connection or a network connection (as long as it's accessible). A secure PDF copy of the printed check will then be archived back to the eChecks server when the server connection is restored.

SwiftConvert Application Server License (Product ID: 13212)

Needed for DNA eChecks Integration. Swiftview will convert DNA check data from PCL format to text output which is required to drop the check it into the eChecks queue.

eReceipts

eReceipts (Product ID: 13100, 13101, 13102, 13103, 13104)**eReceipts Cloud-based Subscription (Product ID: 13105)**

eReceipts automates the output of transaction receipts. After initiating a receipt transaction via the host, host data is sent to the IMM eReceipts application. Once signatures have been captured, if required and submitted, receipts can be e-mailed, printed or texted to the consumer via the optional "eReceipts Text" module. The PDF is stored as a non-editable and indexed PDF eliminating the need to store paper copies of the receipt or the time-consuming effort of scanning and indexing. eReceipts includes a feature to scan withdrawals, deposits, transfer slips, misc. for drive-thru and/or in-branch processes.

eReceipts Texting Module (Product ID: 13106)

eReceipts Text Module enables the option to text an image of the receipt to the consumer. Please note that usage charges will be incurred.

Optical eReceipts ConnectIT Interface (Product ID: 2116)

This interface provides for archived eReceipts documents to have seamless and direct access into the DataSafe Optical imaging platform. Please contact your host system client partner to confirm you have all the requirements for this interface.

Additional Server License (Product ID: 13100)

eReceipts additional server license provides for additional and/or multiple licenses for business continuity purposes or for a training environment at a financial institution.

Host System (eReceipts) Conversion (Product ID: 2115)

Connects your new host to your existing eReceipts software. Connects your new host to your existing eReceipts software. There will also be additional charges for the following: assisting with the deployment of client components, client installations, backing up or taking snapshots of servers, staff training, and weekend/after-hours dedicated support to bring new systems live.

eReceiptsPlus

eReceiptsPlus Cloud-based Subscription (Product ID: 13107)

eReceiptsPlus is an advanced receipt platform that provides the same baseline receipts functionality described in the above Product ID: 1305 but eReceiptsPlus includes the patent-pending embedded signature capture and text-delivery services – available for usage on demand. With eReceiptsPlus, completed receipts can now be delivered to the consumer via the additional channel of SMS-text delivery. The unique embedded signature capture service now allows eReceipts to be sent to the consumer via SMS-text, the consumer can view the receipt and then eSign the receipt directly on their mobile/smartphone device. The signed receipt is then returned to the Institution where it is then available for archival into the institutions imaging/ECM solution.

eTeller Check 21

eTeller Check 21 (Product IDs: 21000, 21004)

eTeller Check 21 enables the use of a small desktop scanner (not included) to capture check items during a transaction - eliminating the need to handle them in a secondary process. The eTeller Check 21 client performs both Courtesy Amount Reads (CAR) and Legal Amount Reads (LAR) and for items that are captured upside down or reversed, the image is flipped or rotated to identify the code line using Image Character Recognition (ICR) and the corrected image is stored. Balancing functionality is provided for tellers to verify correct totals before work is submitted to the item processor. The price includes remote support of the financial institution's set up, installation, and deployment of eTeller Check 21 workstations.

The components of the Consolidation Server solution make transmission of data between tellers and the server seamless. The Store and Forward component transfers transactional data and images from the teller workstations to the server and provides a temporary repository used for research and balancing reports. The SCDC component extracts the check images and data from Store and Forward and creates an Electronic Cash Letter (ECL) file; formatted for transmission to the item processor.

AFS Fraud Detection Interface (Product ID: 21020)

Our Advanced Fraud Solutions (AFS) interface allows financial institutions to interface and leverage the AFS service as an integrated function within the eTeller Check 21 client. AFS services provide advance notification of potentially fraudulent transactions in near real time giving financial institutions the ability to stop those transactions from going forward. Please contact AFS directly to contract for this service.

Cash Letter Extract (Product ID: 21025)

Installed on the Consolidation Server, this custom extract passes specific data by branch and teller through batch tickets.

Extract Module - Onus Clearing File (Product ID: 21030)

Installed on the Consolidation Server, this custom extract creates a posting file for core systems to clear Onus items taken over the counter through eTeller Check 21. This file is in the Federal Reserve's "Fedline" format.

Host System Conversion (Product ID: 21003)

Connects your new host system to your existing eTeller Check 21 software.

Image Exporter (Product ID: 12046)

Installed on the Consolidation Server, this module exports check images during the extraction process and provides an indexed file and single page TIF formatted images.

Interface to eReceipts (Product ID: 12007)

The eTeller Check 21 Interface to eReceipts combines the item images and MICR data captured during scanning and includes them as part of the eReceipts pdf archive file.

Professional Services for eTeller Check 21* (Product ID: 7000-106)

Professional Services provides for a comprehensive analysis of your financial institution's existing policies and procedures including discovery/analysis, best practices, and project management. This ensures a seamless implementation of check item processing and the conversion to eTeller Check 21. A total of four (4) remote days provides: Discovery/Analysis, Installation, and Implementation. Additional remote Professional Services via telephone and/or WebEx will be billable at the current published rate with a 2 hour minimum.

Training/Testing Consolidation Server Software (Product ID: 21009)

The Training/Testing Consolidation Server solution makes transmission of data between tellers and the server in a test/training environment seamless. The Store and Forward component transfers transactional data and images from the teller workstations to the server. It provides a temporary repository that is used for research and balancing reports. The SCDC component extracts the check images and data received from Store and Forward and creates an Electronic Cash Letter (ECL) file formatted for testing with the item processor.

XML Extract for Jack Henry Image Center (Product ID: 21027)

Installed on the Consolidation Server, this Custom Extract passes an XML formatted file for Jack Henry Image Center.

Professional Services / Dedicated Support / Installation 1***Hourly Remote (Product ID: 7000-003)**

A member of IMM's Professional Services team will work with your financial institution to provide training, best practices, and/or analytical techniques and solutions for success.

* Please note: If you are more than 15 minutes late or a "no show" for a scheduled appointment (i.e., project call, installation, etc.) without providing IMM 24-hour advance notice, the appointment will need to be rescheduled and the original block of time allotted for you will be billed in 4-hr increments at the current published rate.

Installation--Onsite-Weekday (+travel expenses) (Product ID: 7100)**Installation/Dedicated Support--Onsite-Holiday (Product ID: 7100-005)****Installation/Dedicated Support--Onsite-Weekend/After Hours (+travel expenses) (Product ID: 7100-001)**

The number of days are only an estimate. The actual day(s) required and billed will depend on the scope of your requirements. Typical onsite installation day(s) include software installation at a main location, administration and deployment training to a designated employee (train-the-trainer), end-user training to a designated employee (train-the-trainer), and/or testing.

Installation/Training/Dedicated Support--Remote-Weekday (Product ID: 7100-002)**Installation/Dedicated Support--Remote-Weekend/After-Hours (Product ID: 7100-003)****Installation/Dedicated Support--Remote-Holiday (Product ID: 7100-004)**

The number of days are only an estimate. The actual day(s) required and billed will depend on the scope of your requirements. Advanced notice of two weeks is required for holiday dedicated support to be guaranteed.

Professional Services--Onsite-Weekday (+travel expenses) (Product ID: 7000-001)**Professional Services--Onsite-Weekend/After Hours (+travel expenses) (Product ID: 7000-000)**

Onsite Professional Services includes IT administrative training and/or an overview of the feature functionality. The financial institution's current procedures will be analyzed and recommendations made to improve the workflow process for best practices.

Professional Services—Remote-Weekday (Product ID: 7000-113)

Remote Professional Services includes installation and/or training of the feature functionality. The financial institution's current procedure will be analyzed and recommendations made to improve the workflow process for best practices.