

## Contents

---

eSign .....	2
eSign for Banks (Product ID: 8204) .....	2
Additional System Integration (Product ID: 1121) .....	2
Additional Branded Entity (Product ID: 1122) .....	2
Additional FI/Portal (Product ID: 1123) .....	2
Additional Server License (Product ID: 17024) .....	2
Intelligent eSignature Engine (ISE) for Dynamic Document Processing (Product ID: 8301) .....	2
Cloud Testing/Staging/Training Environment (Product ID: 1121C) .....	2
POPi/o Video Banking Channel Connector Subscription Fee (Product ID: 8215) .....	3
Remote Signing Authentications (Product ID: 8204) .....	3
eSign <i>plus</i> .....	3
eSign <i>plus</i> (Product IDs: 8204,18054) .....	3
Professional Services .....	4
IMM "White Glove" Onboarding Service (Product ID: 7000-006) .....	4
IMM "White Glove" Onboarding Service – Additional System (Product ID: 7000-006) .....	4

## eSign

---

### eSign for Banks (Product ID: 8204)

IMM eSign for Banks provides financial institutions with a safe and secure method to have documents reviewed and signed electronically. Completed documents with signing event audit trails are indexed and archived into the Institution's Imaging/ECM system. When using the remote signer capability, signers can be 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.

IMM eSign for Banks platform includes in-person and remote signatures, along with eSignature transactions initiated through the IMM eSign API, as well as Web Forms, and the Mega Sign capabilities.

### Additional System Integration (Product ID: 1121)

Provides the ability to support multi-subsidiary, division or configurations within a single IMM eSign system implementation including but not limited to individual brandings for remote signing transactions.

### Additional Branded Entity (Product ID: 1122)

Enables the financial institution to utilize the existing IMM eSign implementation and extend it to support the processing requirements of one additional branded entity. This provides both the additional FI support within the IMM eSign application - as well as an additional branded remote signature portal.

### Additional FI/Portal (Product ID: 1123)

Provides the institution with the ability to establish individual branding and divisional/entity separation of eSignature transaction processing. This module provides for one (1) additional entity/brand/FI to be established within the IMM eSign systems. Additional module licenses are required for each individual branded entity being processed within the parent institution environment.

### Additional Server License (Product ID: 17024)

eSign additional server license provides for supplemental instances of IMM eSign that can be used for business continuity purposes or to create testing and/or training environments at the financial institution.

### Intelligent eSignature Engine (ISE) for Dynamic Document Processing (Product ID: 8301)

The ISE module provides an automated and intelligent document processing capability allowing IMM eSign to support documents from 3rd party business systems that generate documents with dynamic content. This advanced module uses an intelligence-based engine to "read" the content within the document, perform a real-time analysis and determine signing party information, signature field location and other related elements. IMM eSign is able to then automatically setup the document for eSign processing without operators having to perform tagging or manual setup for these uniquely formatted documents.

### Cloud Testing/Staging/Training Environment (Product ID: 1121C)

Provides a separate testing/staging/training environment within the IMM eSign Cloud service for the financial institution to utilize as desired.

### POPi/o Video Banking Channel Connector Subscription Fee (Product ID: 8215)

POPi/o provides video banking collaboration software to help Financial Institutions connect with their consumers and enable highly-engaged interactions for personalized sales and service opportunities. The IMM eSign POPi/o Video Banking Channel Connector provides the ability to copy and paste an IMM eSign Remote URL into the POPi/o user interface delivering eSignatures within POPi/o. This channel provides consumers with the ability to eSign inside the POPi/o Video Banking Solution delivering the power and security of IMM eSign in an additional channel. Please contact POPi/o directly regarding the licensing of video banking; please note your Financial Institution must have an IMM eSign Remote subscription.

### Remote Signing Authentications (Product ID: 8204)

Knowledge Based Authentication (KBA) is available as an option for \$2.50 per attempt. The signer will receive an email notifying them of available documents(s) ready for viewing and signing. This email contains a link back to the transaction in the eSign cloud service. The signer will click the link and is prompted to enter standard personal information (Name, Address and 'optional' last 4 digits of their SSN) that will be used to establish their identity and pose a series of 'knowledge based' questions. The correct response(s) for these NONCREDIT BASED questions are used to authenticate the signer's identity.

Phone/Text Authentication is an available option for \$.20 per attempt where the user enters the signer's cell phone number within the eSignature Management screen. When the signer receives an email notifying them of available document(s) ready for viewing and signing they are prompted to respond as to whether they would like a text message or voice call which then provides an access code, in real time, to proceed in viewing and signing the documents. (Notification is provided during the transaction to the signer that standard text message rates apply)

Government ID Authentication is available for \$6.00 per attempt, the user enters the signers cell phone number within the eSignature Management screen for the signers smart phone, which then sends an email to the signer. This is required for the image capturing application that will compare the ID and its associated characteristics to the knowledgebase for validation. The recipient is given the option to authenticate with either a Driver License or a Passport. The scanned Government ID is authenticated in real time by validating dozens of elements within the document. Once both steps are successfully completed, the recipient is granted access to the documents for viewing and signing. The name of the recipient as presented on the Government ID is imported to the signature field and cannot be edited.

Additional authentication options for Shared Secret Password as well as email authentication are available at no additional usage charge.

## [eSign plus](#)

---

### eSign plus (Product IDs: 8204,18054)

IMM eSign plus allows the Bank to utilize automated workflows and business-rules to control document and eSignature processes so that they occur in precise accordance with your established business policies and/or regulatory requirements. IMM eSign plus 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 eSign plus gives you expanded control over key processes and tasks to make sure they happen each and every time – without fail or human oversight. Finally, IMM eSign plus automatically stores completed documents with their indexes into your imaging/ECM solution without any human intervention.

## Professional Services

---

### IMM “White Glove” Onboarding Service (Product ID: 7000-006)

This professional services package provides a comprehensive on boarding of new clients which includes the installation of software, configuration of system according to Institution's desire or 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 only with the expectation that through the on boarding process, the 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.

Onsite installation/training is also available. Travel expenses are not included and will be invoiced separately. Additional remote Professional Services via telephone or WebEx will be billable at the current published rate with a 2 hour minimum.

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

### IMM “White Glove” Onboarding Service – Additional System (Product ID: 7000-006)

This professional services package provides the comprehensive on boarding of one additional business system to interface with IMM eSign as desired by the Institution.