ESIGN MANUAL OVERVIEW

INTERNAL USE ONLY

This manual is intended to give you an overview of the Esign process in which the client will sign documents using adobe esign. This contains bank procedures, and it is for the use of bank employees and not to distribute to clients.

STEPS

1.

A picture containing text

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\*Once you have successfully send a document to the client via esign. The client will receive an email from IFB Bank with the subject **“Signature requested on “Document Set (for Clients Name)””**

2.- Once the client select the email, it will display the following message. Client will select **review and sign**

Graphical user interface, application

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3. – The next page is the authentication page in which the client will put the password given to the officer. Password structure is **Last Name (First letter of the last name capitalized + Year of Birth**. Example: Alba Mouse. Password **Mouse1965**

Graphical user interface, text, application, Word

Description automatically generated

4.- Once the customer inserted the password, click continue

Graphical user interface, text, application

Description automatically generated

5.- The next screen is the disclosure, terms and conditions page in which clients often gets stuck. Clients will see this screen.

Graphical user interface, text, application

Description automatically generated

\*Clients MUST click on the consumer disclosure link if they want to be able to sign the document via esign. They also have the option to decline it.

6.- Once click on the disclosure a pop window with the disclosure will appear for the customer to read. Clients have the option to close the disclosure in the top right corner.

Graphical user interface, text, application, email

Description automatically generated

7.- Once the client pressed the close button, the consumer disclosure will have a check mark, saying the customer agreed with the disclosure.

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8.- Client now can agree with the consumer disclosure by clicking the checkbox.

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\*That enables the accept blue button. Clients clicks on the accept button.

9.- Once the client clicks on the accept button, a new window with the actual document to sign will pop out. An easy tip to navigate this tip is the start button at the left corner, that will guide the client to the part in where the signature is required. Client Clicks start.

Graphical user interface, text, application

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10. – Client will be directed exactly in the place to sign

Graphical user interface, text, application, email

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\*Client will press **“Click here to sign”**

11.- Once client clicks there, the following screen will show up

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\*Client will draw his/her signature at his best capability. (We do not compare signature against signature card; therefore, customer may sign at his best ability). Also, the customer has to type his name and then click the button apply.

Graphical user interface, text, application

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12.- Finally, once the customer clicked the apply button, a new button at the botton of the page will show up.

\*Clients will press the blue button that says, “**Click to Sign**”. By clicking this button, clients agreed to do business electronically with IFB Bank.

Graphical user interface, text, application

Description automatically generated

13.- That’s it, Client successfully signed the document electronically. The last screen will look like this.

Graphical user interface, text, application, chat or text message

Description automatically generated

\*Also client will receive another email with a copy of the signed document for his/her record

Graphical user interface, text, application, chat or text message

Description automatically generated