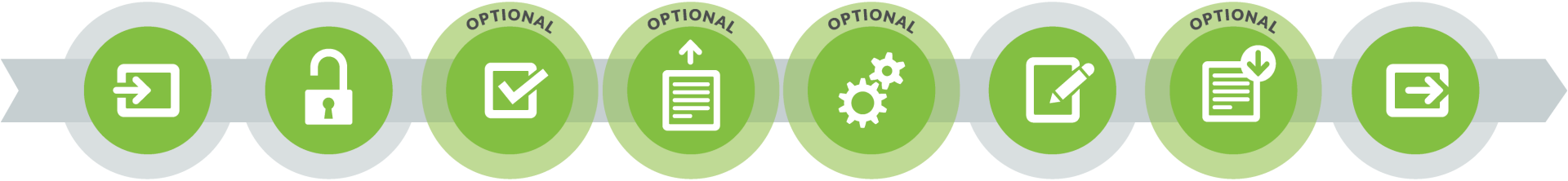
ESIGNATURE WORKFLOW SUMMARY

AlphaTrust®



Start

- Email link
- Website URL
- Kiosk application
- API call

Authenticate Participant

- Email invitation
- Single use PIN
- Username/password
- Knowledge-based authentication (KBA)
- Digital certificate (PKI)
- Single sign-on (SSO)
- Pass-through authentication

Collect Information

- Participant info.
  - Name
  - Title
  - Organization
  - Email address
- Mobile Web Form
  - Checkbox
  - Checkbox list
  - Date picker
  - Drop down list
  - Hidden field
  - Phone number
  - Radio button list
  - Social security no.
  - Text area
  - Text box
- PDF form fill
- Upload document(s) for transaction

Standard Actions

- Process explanation
- U.S. federal consumer disclosure
- Document review (e.g. custom disclosure)
- Upload document(s) (e.g. copy of drivers license)

Custom Actions

- 3rd party application integration
- 3rd party data collection
- Dynamic document management
- Dynamic participant management
- Dynamic task management
- Specialized authentication

Present & Sign

- Sequential or non-sequential signing
- Signature options:
  - Standard (font stamp)
  - Initial
  - Mouse/mobile
  - Touch preferred
  - Acknowledge
  - None
  - Registered
  - Deliver
  - Signature pad
- API call
- Signature annotation
- Ad hoc signature page
- Signature and initial placement via:
  - Page coordinates
  - PDF field name
  - Text string search
- Completed documents & audit trail securely stored in document database

Document Delivery

- Secure download
- Email attachment
- Delivery of other documents (e.g. employee manual)

Finish

- Standard exit page
- Custom URL
- Return to 3rd party application

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Revision 4.22-030617