

# ProDOC Packages™

## Enterprise workflow management

### Paper "Manila" folders ... to ... Electronic Document Workflow...

Ready to fine tune your workflow management process and eliminate document management headaches? ProDOC Packages™ is an enterprise workflow management module that streamlines your transaction documents by packaging them together for easy electronic management, delivery, storage and retrieval. ProDOC Packages™ enables credit unions to close loans faster, process new accounts more efficiently and verify that all documents within a workflow 'package' are fully compliant.



### Key Benefits

- **Easy to use.** ProDOC Packages™ offers an easy way to organize your transaction documents in an electronic 'manila folder' and provides an easy checklist to ensure all documents are included and/or completed prior to delivery or storage. Its quick search filters, form auto population intelligence, stackable data tabs and dashboard organization, makes ProDOC Packages™ an intuitive workflow solution.
- **Flexible.** ProDOC Packages™ enables credit unions to create package types that serve as templates throughout the institution. The stackable data tabs make transitioning between items within any given 'package' quick and efficient. When integrated with ProDOC Forms™, capturing, creating, and even scanning documents into the workflow is as easy as clicking a button.
- **Secure.** Ensures your team follows your business rules for your various transaction types and secures your business workflow. ProDOC Packages™ integrates with eDOCSignature™ to allow transactions to be completed securely over the Internet.

# FAQ's



## What do I need to use ProDOC Packages™?

ProDOC Packages™ requires ProDOC Forms™ (for in-house peers) or eForms™ (for SaaS peers) in order to operate. ProDOC Packages™ is a server application and also requires centralized access to a server with MySQL. For more detailed system requirements visit eDOC at: <http://edoclogic.com/prodoc-packages/>.

## Do I have to install software?

Yes. Our installation team will assist in installing ProDOC Packages™, and if necessary ProDOC Forms™, training your team members and if desired configuration of templates for your package workflow.

## Who do I call for support?

eDOC Innovations' client service representatives are standing by waiting to assist. To contact a team member call: **800-425-7766 option 2.**

**Check  
out  
Packages!**

## How do I get started?

Your account manager or any eDOC sales team member can assist you in getting started with ProDOC Packages™. Contact a team member today at **800.425.7766 option 3** or visit eDOC at <http://edoclogic.com/contact>.

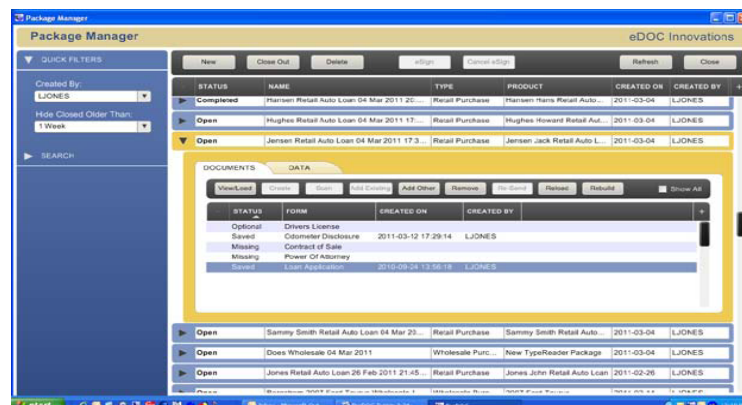


## Tell me more about the eDOC Signature™ add-on...

### What happens to the document after signing?

**For the member**, at the completion of signing your member is presented with an option to save the document for their personal records. If your credit union utilizes eDOC's Member Document Portal, members can retrieve a copy from the portal 24/7.

**For the credit union**, the completed document is automatically stored into the 2020DOC®, or idocVAULT™ image store.



## Is the credit union notified once the documents have been signed?

**Yes.** All relevant parties, including the credit union and any signees, are notified via email once the signing of the document is complete. The status of these documents included in ProDOC Packages™ are also updated.

## What are credit unions saying about ProDOC Packages™?

"Packages gives you a visual checklist of all necessary documents. No more missing forms. You can focus on your members while completing paperwork. Packages will let you know when all forms are complete so you can spend more time answering questions and giving information instead of leafing through documents to make sure they are all signed. Packages also allows you to have paperwork ready before the member comes in to sign documents. This makes the loan signing process quicker for the member and the credit union."

- *Connie Vukmanic, Ohio Catholic Federal Credit Union*

**See it today!**  
**Contact eDOC Innovations:**  
800.425.7766 option 3  
<http://edoclogic.com/contact/>

