

Workflow Checklist

Marketing Advantages

Requirements	Vendor Considerations	Safedocs Solutions	Competitor(s) Solutions
Generate revenue	Use for Marketing to clients	You can provide needed workflows that you can charge clients, agents for...	
Cross Market products	Offer additional sales add-ons	Safedocs provides you a platform for marketing all your products	
Control of solution and ability to change branding on the fly	Control your own branding	Safedocs allows you're firm to change branding-marketing on the fly	
Integrate with existing proprietary systems and or Data Storage	Push pull data seamlessly	Safedocs customizable platform allows you endless data and document integration	
New Government requirements	Platform can easily be modified	Safedocs is ahead of the market with the ability to plug and play many components	
Non intrusive signing functions <i>No additional cost for Signatures</i>	Unparallel User experience.... It must be positive!	Users do not need to fill out suspicious forms in order to sign documents- filling out forms have proven to deter use. Better the experience = more referrals and better customer retention: No forms and No additional cost to sign documents	

For more information, Please contact Safedocs at info@sfdocs.com (925)256.1040

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Workflow Control

Requirements	Vendor Considerations	Safedocs Solutions	Competitor(s) Solutions
Many enterprises need to support proprietary document formats not just office or PDF	Form file format	Works with any type of document	
Requirement to mirror existing sign-off processes often involving several steps	Recipient routing	Fully supports any disclosure and delivery workflow and document routing needs	
Requirement to secure and enforce the contract execution step including authentication, workflow, and storage	Document templates	Signing workflow uses native signature fields, enforces transaction process, and enables multiple signing and or one-click signing by authenticated recipient	
Requirement to control the transaction workflow while it is underway; change recipients, re-route workflow as needed	Real-time control	Control over a transaction while in process, including correct, reassign, change content and re send, enables visibility and control	
Need for several different authentication options for each signer. May also want to leverage existing authentication tools used	Signer authentication	Integrated multi-factor authentication	
Need for bulk sending tools that merges data from databases to create custom contracts on the fly	Bulk sending	Uses services to provide full data integration and bulk creation and sending of packages to any number of recipients	
Requirement to handle large numbers of documents easily without the delays of HTML page refreshes	Distribution	Send from web, desktop, or integrated application	
Need for different channels of sending contracts and they want contracts from all channels to be managed and stored the same way	Notification	Sign via email notice, embedded into web application, or in-person at the same PC	

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Infrastructure

Requirements	Vendor Considerations	Safedocs Solutions	Competitor(s) Solutions
Require a SAS70 data center, and SLA for such important transactions	Secure data center	All level of security available	
Must have the ability to manage users inside an account structure, controlling access, oversight, etc	Account administration	Corporate account structures for any size enterprises	
Customers need full branding to preserve a seamless signing process	Branding	Branding of user interface, signing and email experience	
Support for contracts that are originated via existing HTML forms as part of ecommerce channels	HTML forms	No integration into existing HTML forms. Feature is under development	
Must have robust API for automated data access and management	Secure API	API enables one way data access from other systems. Custom data reading and automated external system feeding available.	
Financial transactions involving notes, or leases require handling as Transferable Records. (UCC and UETA).	Transferable records	Provides support for UETA compliant eVaulting internally, or can export to external eVaults.	

Forms

Requirements	Vendor Considerations	Safedocs Solutions	Competitor(s) Solutions
Must support 'fill out and sign' forms with form fields, masking, radio buttons, pull down lists, etc.	PDF forms	Supports form filling and data management.	
Forms control.	Form workflow	Central control of form workflow and access rights even after the forms have been distributed.	

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Collecting the signature AND the data entered by the signer eliminates re-keying.	Form data collection	Data collection and access via API or UX.	
Enabling central distribution of signable documents is important for many customers.	Documents	Individual documents may be distributed.	
Ensures the proper signers fill in only what they are supposed to complete.	Signer-specific data fields	Enforce which users fill which form fields. Available for signing fields only.	

Legal Process Control

Requirements	Vendor Considerations	Safedocs Solutions	Competitor(s) Solutions
Signing process must adhere to key legal frameworks to ensure ESIGN Act and UETA for fully qualified electronic signature	Encryption of signed document	Secure ESIGN Act and UETA process including integrated authentication, audit trail and Encryption.	
Contracts need the strong legal standing of a true electronic signature system not a risky 'I agree' process.	Signer intent for ESIGN compliance	Adoption of secure electronic signature and initial unique to the signer	
Provides a familiar and easy to understand signing process which also shows strong 'intent to sign' which is a core requirement of ESIGN.	Signer "intent to be bound"	ESIGN process allows a signer to place the signature directly into the contract, on the designated area for the signature including Multiple signatures for same signer.	
Support for ESIGN compliant consumer transactions	Consumer consent	Management and tracking of consumer consent including customizing the text of the consent, and enforcing it for consumer transactions.	
Signing process must preserve the form structure (no markings in margins that invalidate most forms).	Preservation of original document intent	Enables signatures and data to be placed into original PDF documents, in the designated area for each signature.	

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