

Document Pricing Guidelines

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New Installation Document Pricing*

Special document pricing of \$100/page (capped at \$350/document) is available for documents identified by name and itemized on the "Initial Document List". The list needs to be completed within 30 days of signing the eSign software proposal. This special pricing excludes the Loan Estimate and Closing Disclosure documents, which will be priced at \$500/document due to their complexity, and any other documents not identified on this initial list. Documents must be provided to IMM in an unlocked** PDF, IFD, Excel or Word file format (includes 3rd party vendor documents***). JavaScripting work and bar coding (if required/desired) is available at an additional charge. Additional charges will apply for documents coming to IMM as paper or in other formats.

Annual maintenance for these documents will be based on the standard \$350/document base fee.

The standard document pricing that follows applies for all other document or check related requests.

* Document base price does not include smart form features.

** If we cannot convert the source document that is provided to us, you will be notified of the increase in price and your approval will be required to proceed.

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Standard Document Pricing*

Unlocked Documents (PDF, IFD, EXCEL or DOC)

Documents received as an unlocked** PDF, IFD, EXCEL or DOC file format will be quoted at \$350, except on Loan Estimate and Closing Disclosure documents will be priced at \$500/document due to their complexity (includes 3rd party vendor documents***).

Proprietary Documents

Proprietary documents (non-copyrighted) will be quoted at \$350. Proprietary documents received in any file format other than a XFM (i.e., hardcopy, locked PDF, Word Doc, etc.) will be required to be converted to a XFM and formatted/cleaned-up. Documents over 3 pages will be charged an additional \$30/pp to be cleaned-up as a separate revisions line item.

Document Conversion Only

Conversion of an IFD, PDF, EXCEL or DOC document will be quoted at \$30/page for conversion ONLY. This is PLAIN file format conversion and the price will not include any type of design clean-up, formatting, and/or field mapping.

Document Replacements

Document replacements (includes proprietary documents and 3rd party vendor documents***) received as an unlocked PDF, IFD, EXCEL or DOC file format will be quoted at \$80/hr w/ a 2 hr minimum per document. If the document is not covered under annual maintenance, the document will be priced as new based on the type of document it is.

Document Revisions

Revisions include field mapping, design changes, adding new items/logos to a document, and/or adding blank pages for duplex printing. Document revisions will be quoted at \$80/hr if the document is covered under annual maintenance and \$320/hr for documents not covered under annual maintenance. Please ensure that IMM has the latest source files (XFMs) to apply the requested document revisions to.

eSign Remote/In-Person Signature Fields

Map digitized/digital signature fields with/without Data Aware/Unaware signature logic will be quoted at \$80/hr if the document is covered under annual maintenance and \$320/hr for documents not covered under annual maintenance. Please ensure that IMM has the latest source files (XFMs) to apply the eSign Remote signature fields to.

Smart Form Features

Smart form functionality includes adding custom JavaScripting, setting up mandatory fields, locking all host fields, and/or adding PDF417 barcodes. Smart form functionality will be quoted at \$80/hr if the

* Document base price does not include smart form features.

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*** 3rd party documents MUST be sent to us directly from the vendor.

document is covered under annual maintenance and \$320/hr for documents not covered under annual maintenance. Please ensure that IMM has the latest source files (XFM's) to apply the smart form features to. IMM does not teach financial institutions how to write custom JavaScripting; IMM shares common generic examples. If additional help beyond the examples is required then Professional Services for Document Design Support is available.

Custom eSign Style Sheet

FISpecificXSL Style Sheet has the ability to hold custom programming and create custom fields based on the availability of data. These custom fields can be used on all documents versus placing the custom JavaScripting on each document. IMM does not teach financial institutions how to write custom programming for FISpecificXSL. The price to create custom fields via FISpecificXSL Style Sheet or future revisions to the style sheet will be quoted at \$80/hr.

Barcode Coversheets

Barcode/ScanID coversheets (used with ID Capture add-on) to meet on-demand needs to generate PDF417 Barcodes or to scan IDs using ID Capture will be quoted at \$80/hr w/ a 2 hr minimum and annual maintenance charged****.

Duplicate Documents or Pages to be used with eSign Criteria

Duplicate pages or documents to support the criteria feature of eSign or for any other purpose will be quoted at \$80/hr and annual maintenance charged****.

Host System Conversion

If an existing eSign customer is converting their core or loan origination system (LOS), document work for the new core or LOS will be quoted at \$80/hr if the document is covered under annual maintenance and \$320/hr for documents not covered under annual maintenance. Please ensure that IMM has the latest source files (XFM's) to do the design work for the new core or LOS.

Fields Unlocking on Signed Documents

By default all signed documents retrieved from Saved Session (formally known as DocQ) are locked except signature and submit buttons. If your financial institution needs to unlock specific fields on signed documents (when retrieved from Saved Sessions), the work will be quoted at \$80/hr. Your financial institution will be required to sign a disclaimer along with the proposal acknowledging that data fields will be able to be edited after the signature is applied and accepted.

Professional Services – Document Design Support

Remote document design support is available by appointment only and is billable at \$320/hr in 30 minute increments with a \$160 minimum. Full day remote document design training is available and will be quoted at \$1,500/day (includes 2 trainees in 6.5 hrs.). Additional trainees are \$250/ea. (max 4).

Before purchasing support, ensure that you have collected all document mapping and/or design related issues and questions. A Document Design Support Representative will go through each issue and will

**** Annual maintenance will be billed based on the original price (\$350-\$600)

provide thorough training. If there are any documents that require JavaScripting in order to pre-fill a form in eSign, a Document Design Support Representative will assist with teaching the function based on the complexity of the formula. If it is decided that the document requires complex JavaScripting, a proposal will be provided with an estimate.

Widget Fielding for eSign Remote

Source file must be provided; work will be billable at \$320/hr.

eChecks/eSign LaserChex Additional Designs

Standard check type (General Ledger/Expense, Official/Cashier/Teller, or Loan) requests that come in after the initial installation will be quoted at \$80/hr w/ a base price of \$500 for calculating annual maintenance. Custom check types (Money Order, Audio Response, Batch, Shared Branch, Escrow, or Starter Checks - only if core generates data to print) will be priced at \$500. Third party check designs will be quoted at \$1,500.

Additional LaserChex designs that are received after the initial installation will be quoted at \$80/hr with a base price of \$500 for calculating annual maintenance.

A proof will be submitted for your approval of text, graphic, and general content. The proof is to be checked for spelling, graphics, routing/transit numbers (when applicable), and account numbers (when applicable). We will not proceed until we receive back an email confirmation of proof approval.

RTS Template Creation

New RTS Templates will be priced at \$100 each. Annual maintenance for these templates will be based on the standard \$350/document base fee. Revisions or replacements will be quoted at \$80/hr if the template is covered under annual maintenance and \$320/hr for templates not covered under annual maintenance. The collection of all source files by your assigned Designer for revision or replacement orders will be included in the hourly billing.

SymApp Document Design

New customer special document pricing of \$80/hr will be available for documents identified by name and itemized on the "Initial Document List". The list needs to be completed within 30 days of signing the eSign Remote software proposal. Documents must be provided to IMM in an unlocked** PDF, IFD, Excel or Word file format (includes 3rd party vendor documents***). Annual Maintenance for these documents will be based on the standard \$350/document base fee. Documents received after initial list will follow our standard pricing guidelines.

eReceipt Template Revisions:

Custom template revisions will be quoted at \$80/hr. Name/logo changes can be performed without IMM's involvement but if assistance is request, it will be quoted at \$80/hr.

** If we cannot convert the source document that is provided to us, you will be notified of the increase in price and your approval will be required to proceed.

*** 3rd party documents MUST be sent to us directly from the vendor.

Logo/Name Change:

If your financial institution under goes a logo and/or name change, and IMM’s assistance is required, please email AdminOps@immonline.com the updated information and live date to start the process. Logos should be provided in a high quality TIFF or PCX format (JPEG is also acceptable only if TIFF or PCX are not available).

eSign Documents: If your financial institution is maintaining their own documents but would like to contract the work out to IMM, please provide a list of the documents you would like updated along with the current XFM. If IMM maintains your documents, we will provide you with a list of your active documents and request your confirmation of which documents require updating.

Starter Checks/Loan Coupons: If IMM’s assistance is requested, IMM will provide a proposal for updating your active files based on their annual maintenance status.

eChecks: IMM will provide a proposal for updating your active packages based on their annual maintenance status.

eReceipts: If IMM’s assistance is requested, a proposal will be sent for signature. Specifications for the logo are as follows:

IMM eReceipts Logo Specifications

The following Logo specification should be used when adding a logo:

Spec Name	Spec Detail
File Name	TeRLogo1.jpg and TeRLogo2.jpg
File Size	317 x 152 pixels with Resolution 203 dpi
Bit Depth	24
Color/Tone	Grayscale
Server File Location	\\IMMeReceiptsServer

Procedures and Guidelines for Ordering Documents

Collecting Documents to Place an Order

The latest version of all 3rd party vendor (copy-righted) documents MUST be sent to AdminOps@immonline.com directly from the vendor. Review the documents in advance with your 3rd party vendor to ensure accuracy of the content as well as the default information that should auto-fill into the appropriate document fields. Original source file for proprietary documents (non-copyrighted) should be provided directly from financial institution.

Make sure to submit the latest version of your financial institution's logo file and any other information that the documents should contain.

eSign allows you to process more than one document on-demand. It also allows you to create document sets (packages of documents) in advance that will then be automatically selected based on product type, transaction type, or other business rules. IMM does not create these document sets but your system administrator will be trained on how to create document sets during the installation training. If you are a current user and do not understand how to create document sets, please contact our Support Department for assistance. Please check your document list and ensure that you have not placed an order for documents where different documents have been merged/packaged as one document or the same document is listed multiple times.

Changes Requested on Documents that are In-Process or Delivered

If you want changes made to the design of your documents during the proofing stage that were not included in the original specs of the job, additional charges may apply.

If the document work is in process or has been completed according to the proposal and you decide to cancel the request, all time accrued is billable.

Document Delivery and Rush Fees

Standard delivery time is 45 to 90 days for documents and 30 days for checks from the day the signed proposal is received. A rush delivery fee will be charged to orders as follows: delivery in one week – 40%, delivery in two weeks – 30%, delivery in three weeks – 20%. Rush charges are calculated based the total amount of the order. Delivery can only be promised if all the necessary items have been submitted with the signed proposal.

Proofing Revised Documents Procedure

Please note that document revision orders will include a 10 day proofing stage. Corrections will be completed at no additional charge but additional revisions beyond the original scope will be billed at the quoted hourly rate. Once 10 days from delivery of proof has passed, all document revision requests will be billed automatically.

Warranty Period

The warranty period covers mapping changes discussed/decided during testing of the electronic documents with IMM software. Requested mapping changes should be reviewed thoroughly so they can be applied only once. The warranty period on electronic documents expire in 45 days from the date of delivery. Any corrections/modifications required beyond the 45 day period are billable. The warranty period on electronic documents for new installations expires 90 days from live date except for Jetform conversion installations which will carry a 45 day warranty period from training date due to implementation timeline constraints to go live.

Annual Maintenance (AM)

Annual maintenance can be part of your disaster recovery plan. In the event of a disaster, IMM will provide document replacement via e-mail or overnight disk. Annual maintenance also provides for document revisions, workflow enhancements, and changes/replacements required by your third party vendor and/or data processor at the reduced annual maintenance rate of \$80/hr (without AM the hourly rate is \$320). You are also eligible for unlimited telephone support during normal business hours.

[Maintaining your own documents](#)

LiquidOffice Form Designer - Document Preparation Training Class

A two day training class is available and strongly recommended for any financial institution that is interested in designing and maintaining their documents. The class is two full days. The first day will include training on creating documents in LiquidOffice Form Designer with attendees designing and fielding documents including best practices for customizing and building form design concepts.

Day two includes how to set up dynamic intuitive document selection, signature fielding for in-branch and remote signatures, adding eSign objects in the JavaCode Generator, importing pre-existing PDFs, a demonstration of document conversion, and the JS Lab showing attendees how to utilize the Expression Builder/JavaScripting. Attendees will receive a thumb drive with expressions and JavaScripting examples of practical applications that existing financial institutions have used to streamline document processing. The entire training class is hands-on and features a technical and operational review of "How To" which is a necessity for financial institution personnel that plan on creating or maintaining documents for eSign and/or eSign Remote.

The cost is \$1,400 and covers the seminar course materials, a training workstation, and breakfast and lunch on both days.

LiquidOffice Form Designer Software

LiquidOffice Form Designer Software is \$1,500/workstation with \$300 mandatory annual maintenance for the first year. Annual maintenance includes support directly from vendor for telephone, fax, and email support pertaining to service packs, point releases, and upgrades. Form design and fielding support by IMM is billed at \$120 in 30 minute increments. It is strongly recommended that you keep your license current on annual maintenance to be eligible to receive software updates as they are released.

JavaScript Code Generator (JSCG)

A license is required for each workstation running LiquidOffice Form Designer software. The initial software license fee is \$150 and all upgrades, including upgrading your existing license to support a multi-host environment, will be billed at \$50/license.

The JSCG gives you the ability to generate the JavaScript code required for documents to be submitted into eSign documents.

The JSCG Features:

1. Duplicate Fields – allows fields that appear multiple times to carry over data to all related fields throughout the document.
2. Repeated Fields – allows you to identify identical field names prior to generating the JavaScript code.
3. Mandatory Fields – allows you to set required fields within your forms.
4. Locked Signature fields – allows you to lock the fields once the document is signed and stored in Saved Sessions (formally known as DocQ).