



DOCUMENT MANAGEMENT

The DOCS module enables agents to send visual verification requests, including photos, through the computer's camera using the FLASH component, or via a mobile camera using HTML5.

This module is a component that can be added to the chat module or used as a separate internet process. The module can include a video chat module that makes video calls between agents and a PC by utilizing the FLASH component and on mobile through a dedicated application that needs to be downloaded from App Store or Google Play.

PDF Component This component allows the agent to send a PDF to the consumer to either sign in the tick box or to use a signature sample that was sent via Snapshot. The management interface enables the agent to create PDF templates.

The PDF templates include the name of the PDF, the actual PDF file (without dynamic information such as name and ID) and the signature areas where the consumer has to sign (with a tick or sample signature by clicking the mouse on the signature area).

When the agent selects a PDF format which includes the area for signing, they must send the same blank PDF like the original that was uploaded to the system or the same PDF which contains identifying information such as name, ID and so forth. As long as the signature area is in the same place, there is no problem regarding the contents of the PDF.

HOW THE PROCESS WORKS

The DOCS component allows the organization to establish documents in the system settings. These documents can be defined simply and without the need to write client-side code. Settings can be changed at any time and are carried out in the management interface which is supplied with the system. These changes are authorized for users granted permission in advanced.

BEWARE!

The customer does not need the PDF READER software, since the system accesses the document without the need for editing the PDF. After clicking the icon, the customer will see a document with or without scrolling (depends on the length of the document), and areas where "sign here" will appear (can be replaced with anything else).

When the customer clicks on any area with the mouse, a tick sign or sample signature will appear, which was sent at the Snapshot stage. To conclude, the agent clicks on "Finish and send." This process returns the signed PDF to the agent with the option to add a certificate which will be provided to the customer. Immediately after sending the PDF, the agent can see it through the conversation pane and can send another document.