

infoReadit – Track & Sign Digital Documents



The smart way to send business documents



Why the need?

Every day we share documents with our customers and business partners, whether it's a legal document, an important proposal, quotation or any document requiring a signature.

Sending documents via post is expensive and slow. Emails can go missing due to spam filters, or simply remain unread due to the volume of messages sitting in someone's in-box.



infoReadit is an innovative way to quickly compile and securely send business documents.....and if a document remains unread or unsigned, you'll know about it!

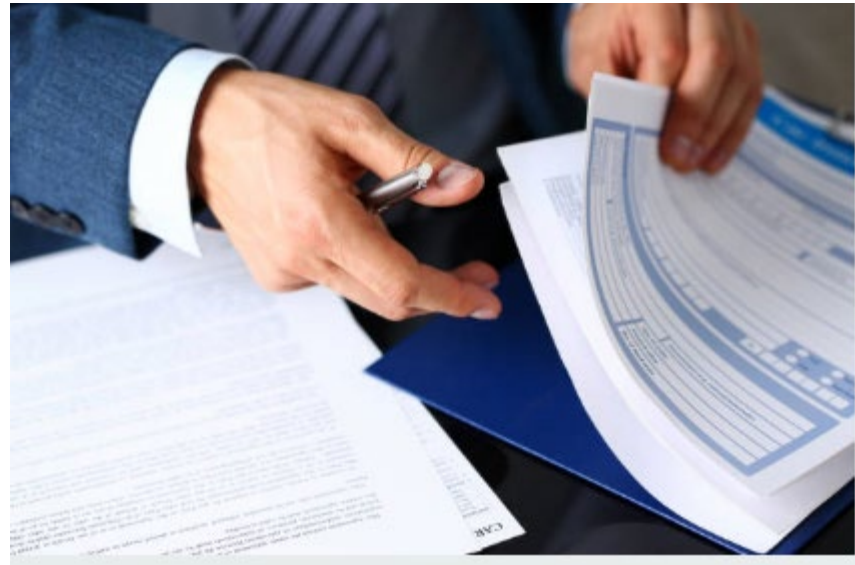


Typical applications

infoReadit is ideal for any type of business document or correspondence which needs to be tracked, requires further comment, or needs an electronic signature.

Examples include:

- Proposals
- Quotes
- Contracts
- Legal Correspondence
- HR Documents
- Purchase Orders
- Sales Invoices
- Drawing



In fact, any document you need tracked or digitally signed!



Key Features

- **Cloud solution** - no upfront charge
- **Brand infoReadit** viewer with your company logo
- **Rapidly create documents** by using a master PDF then adding library documents as required (e.g. add a price list or terms & conditions)
- Add **logical separator pages** to create natural breaks in the document
- **Decide how your recipient interacts** with the document – View Only, Download a Copy, Add Comments, or Sign the document
- Add a **Signature Page** anywhere in the document
- **Track** if your document has been viewed, downloaded or signed
- **Add or respond to comments**
- Receive regular **email alerts** with updates on what's been read
- **Statistics and reports** feature allows you to quickly highlight any documents not viewed or signed
- Allow users to **share their document libraries** (ideal for sales teams)
- Facility to **make documents private** within your user group
- **Delete or Archive** old documents to a local drive, or DMS



How it works – 6 easy steps

Step 1:

Create a new infoReadit transmission link and add a description and company name. Now decide how your recipient can interact with the document – View Only, Private File, Download a Copy, Add Comments, or Sign the document

New Link:

Link title:

Company:

 ▼

Private Allow download

Comments Signature



How it works – 6 easy steps

Step 2:

Rapidly create your infoReadit document pack using a master document, then adding library documents as required (e.g. terms and conditions, price list, or a specification).
Add separator pages to create logical sections and add a Signature Page if applicable.

**Document pack
which will be
sent to the
recipient**

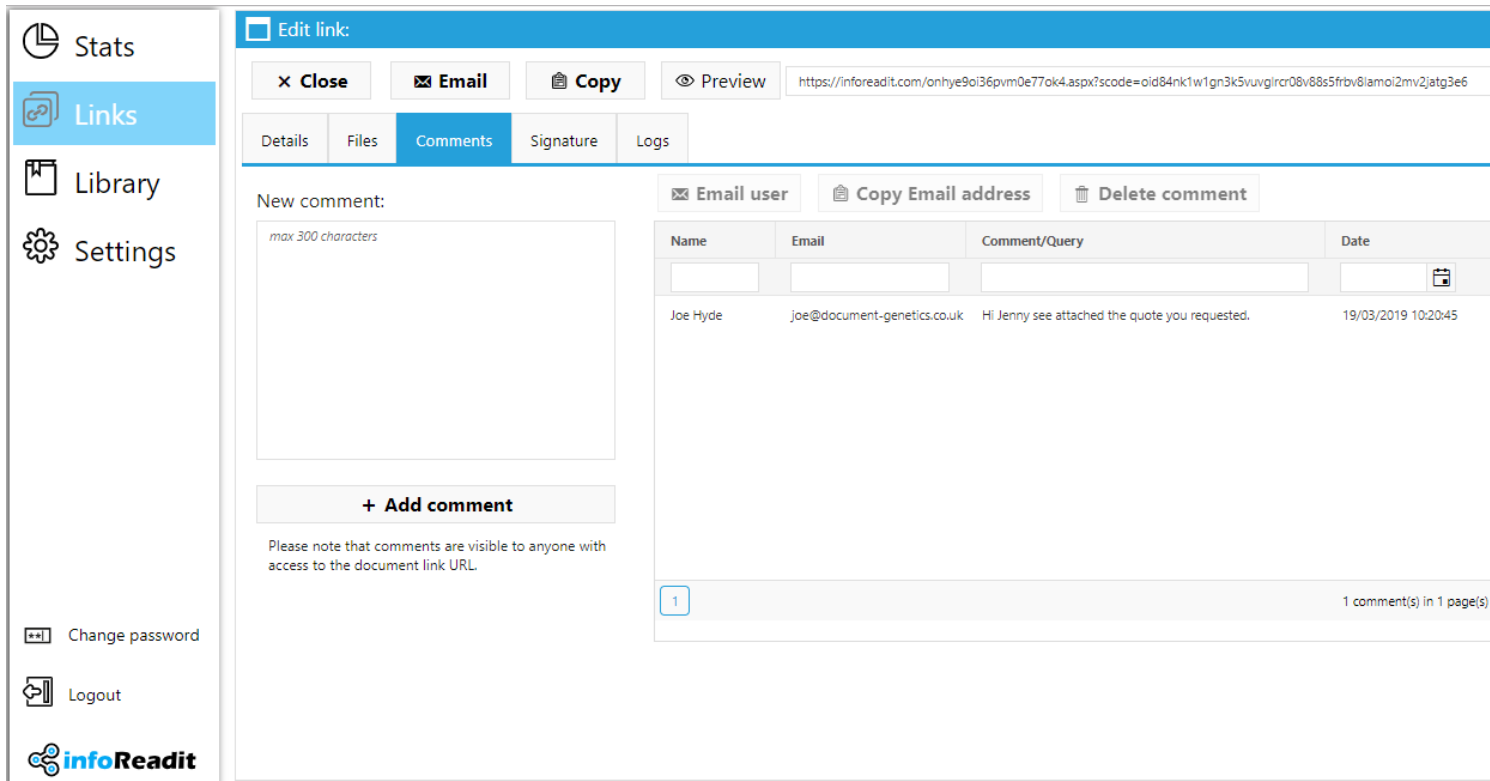
The screenshot displays the 'infoReadit' 'Edit link' interface. On the left is a navigation sidebar with 'Stats', 'Links', 'Library', and 'Settings'. The main area is titled 'Edit link' and includes a URL, 'Close', 'Email', 'Copy', and 'Preview' buttons. Below are tabs for 'Details', 'Files', 'Comments', 'Signature', and 'Logs'. The 'Files' tab is active, showing a 'File list' with sections: 'Quotation' (Lemon Trading Invoice Automation), 'Company Info' (DG Overview.pdf), 'Spec Sheet' (Abbyy AP Automation User Guide), and 'Signature' (Signature Page Brief.pdf). A red bracket highlights the 'Signature' section. To the right is an 'Upload' section with a 'Drop files here' area and a '+ Add file(s)' button. Further right is a 'Library files' section with a '+ Add file' button and a list of folders including 'Signature Page' (containing 'Signature Page Brief.pdf').



How it works – 6 easy steps

Step 3:

Add comments (if applicable) – this will allow you recipient to add their own comments. All comments are recorded and saved, which is great for keeping a long term record of a business conversation.



The screenshot displays the 'infoReadit' web interface. On the left is a navigation sidebar with icons for Stats, Links (highlighted), Library, and Settings. At the bottom of the sidebar are links for 'Change password' and 'Logout', and the 'infoReadit' logo. The main content area is titled 'Edit link:' and shows a URL: <https://inforeadit.com/onhye9oi36pvm0e77ok4.aspx?score=oid84nk1w1gn3k5vuvjrcr08v88s5frbv8lamo2mv2jatg3e6>. Below the URL are tabs for 'Details', 'Files', 'Comments' (selected), 'Signature', and 'Logs'. The 'Comments' section includes a 'New comment:' form with a text area (placeholder: 'max 300 characters') and a '+ Add comment' button. A note states: 'Please note that comments are visible to anyone with access to the document link URL.' To the right is a table of existing comments with columns for Name, Email, Comment/Query, and Date. One comment is listed: Joe Hyde, joe@document-genetics.co.uk, 'Hi Jenny see attached the quote you requested.', dated 19/03/2019 10:20:45. Above the table are buttons for 'Email user', 'Copy Email address', and 'Delete comment'. At the bottom, a pagination bar shows '1' and '1 comment(s) in 1 page(s)'.

Stats

Links

Library

Settings

Change password

Logout

infoReadit

Edit link:

Close Email Copy Preview <https://inforeadit.com/onhye9oi36pvm0e77ok4.aspx?score=oid84nk1w1gn3k5vuvjrcr08v88s5frbv8lamo2mv2jatg3e6>

Details Files Comments Signature Logs

New comment:

max 300 characters

+ Add comment

Please note that comments are visible to anyone with access to the document link URL.

Email user Copy Email address Delete comment

Name	Email	Comment/Query	Date
Joe Hyde	joe@document-genetics.co.uk	Hi Jenny see attached the quote you requested.	19/03/2019 10:20:45

1 1 comment(s) in 1 page(s)

How it works – 6 easy steps

Step 4:

If you've added a signature, you can now decide what information the signee must include (e.g. company name and job title). You can also add a second level of security by enabling the email verification code.

The screenshot shows a web interface for editing a document link. On the left is a sidebar with navigation options: Stats, Links (selected), Library, and Settings. The main area is titled 'Edit link' and contains several action buttons: Close, Email, Copy, and Preview. Below these is a URL field. A tabbed interface shows 'Signature' as the active tab, with other tabs for Details, Files, Comments, and Logs. The 'Signature' tab contains the following settings:

- Require email code (optional)
An input field contains the text *email address*. Below it, a note states: "A code will be sent to the email above which the user must enter to sign the document."
- Require Company name
- Require user job Title

On the right side of the 'Signature' tab, there is a section for 'Signature tags' with the following list:

- [[initials]]**
- [[signature]]**
- [[name]]**
- [[date_and_time]]**
- [[company_name]]**
- [[job_title]]**

Below the tags is a link: [Download signature page sample](#). At the bottom of the main area is a 'Save changes' button. A note at the very bottom reads: "Use the 'Preview' button above to test the signature."



How it works – 6 easy steps

Step 5:

Preview your infoReadit document to check you've included everything – this is what the recipient will see.

The screenshot displays the infoReadit document preview interface. At the top, there is a navigation bar with a logo placeholder 'Your Logo Here', a 'Download' button, a 'Comments (1)' button, and a 'Sign document' button. The main content area shows a preview of a 'Quotation' document. The document header includes the company logo and name 'Sample Company', followed by contact information: 'Registered in Wales No 2715580', 'VAT Registration No GB751254470', 'Hill Farm, Sully, Ayrton, Sully, Northants, NN16 6BN', and 'Tel: +44 (0)1534 871177 <http://www.samplecompany.co.uk>'. The document title is 'Quotation'. Below the header, there is a table with columns for 'ITEM', 'PRICE', 'UNIT PRICE', and 'AMOUNT'. The table is divided into sections: 'SOFTWARE AND SERVICES', 'SOFTWARE MAINTENANCE', and 'LEASE OPTION'. The 'SOFTWARE AND SERVICES' section includes items like '1.00 1 Year Software License' and '1.00 1 Year Professional Services'. The 'SOFTWARE MAINTENANCE' section includes '1.00 1 Year Software Maintenance'. The 'LEASE OPTION' section includes '1.00 1 Year Software Lease'. The total amount is £4,898.00. The document footer includes the text 'All units are inclusive of VAT. Our standard payment terms of 30 days apply, unless otherwise stated. Quotations subject to Terms & Conditions available at www.infoReadit.com'.

How it works – 6 easy steps

Step 6:

Finally, select the email button which will open your favourite email client with the infoReadit link inserted.

 Send	To...	jenny.smith@lemontradingplc.co.uk
	Cc...	
	Subject	Quotation

Hi Jenny,

See attached the quote requested. When you're ready to proceed, please sign using the electronic signature facility.

<https://inforeadit.com/onhye9oi36pvm0e77ok4.aspx?scode=oid84nk1w1gn3k5vuvglrcr08v88s5frbv8lamoi2mv2jatg3e6>

Regards,

Joe Hyde

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Electronic Signature


One of the important facilities of infoReadit is the ability to send a document to a recipient for an electronic signature. Signatures can be inserted anywhere in your document (multiple times), or simply added as a standard signature page.

To sign a document the recipient simply selects the sign button and adds their name and details – they can also choose their signature style.

 **Sign document**

Signature ×

First name:	<input type="text" value="Jenny"/>	Select style:	<input type="radio"/> Jenny Smith
Last name:	<input type="text" value="Smith"/>		<input checked="" type="radio"/> <i>Jenny Smith</i>
Company name:	<input type="text" value="Lemon Trading plc"/>		<input type="radio"/> <i>Jenny Smith</i>
Job title:	<input type="text" value="Company Director"/>		<input type="radio"/> Jenny Smith

 **Sign document**



Electronic Signature

Once signed, the signature will be automatically inserted into the document and the signature button removed. The document can be downloaded for the recipients records and the sender will be notified the document has been signed.

Your Logo Here **Download** **Comments (1)** **powered by infoReadit**

27 of 27 Search

Signature Page

This is an infoReadit signature page which is used to insert an electronic signature into the document you are currently viewing. When you electronically sign this document, your signature, name and company details will replace the information shown in square brackets.

To sign the document, click on Sign document button above.

Signature:	<i>Jenny Smith</i>
Signature Initials:	JS
Full Name:	Jenny Smith
Date and Time:	19/03/2019 11:01:38
Company Name:	Lemon Trading plc
Title:	Company Director

AGREEMENT:

By signing this document, I agree that my electronic signature is the legally binding equivalent to my handwritten signature. Whenever I execute an electronic signature, it has the same validity and meaning as my handwritten signature. I will not, at any time in the future, repudiate the meaning of my electronic signature or claim that my electronic signature is not legally binding.



Email Alerts

Every 30 minutes infoReadit checks if there has been any activity – if a document has been viewed, downloaded, comments added or signed, the sender will be notified. If there's nothing to report the email alert does not run.



auto@inforeadit.com

joe@document-genetics.co.uk

Report - infoReadit

Dear Joe Hyde,

Please find below the latest report of your links activity:

Title	Company	Action	Date/time
Quotation - Abby for Invoices	Lemon Trading plc	Download	19/03/2019 11:27:08
Quotation - Abby for Invoices	Lemon Trading plc	View	19/03/2019 11:27:03



This is an automatically generated email. Please do NOT reply to this email.

To ensure future emails are delivered to your email inbox and not treated as spam, please add auto@inforeadit.com to your safe senders list.



Links Page

From the Links page you can quickly get a view of all of the document transmissions and their status. Any of the columns can be filtered to search for specific information.

Stats
Links
Library
Settings

Create **New link** Options Edit Archive Delete Link URL Email Copy Preview

Status codes: V = Viewed, D = Downloaded, C = Comments, S = Signed, n = not, i.e. nV = not viewed

Status	Title	Company	Date Created	Last Viewed	Last Downloaded	Signed on	Last Comment
nV nD C nS	Quotation - Abby for Invoices	Lemon Trading plc	19/03/2019 10:06:15				Hi Jenny see attached the quote you requested.
V D C nS	Quotation 120319	Acme Trading	12/03/2019 16:14:28	19/03/2019 09:10:48	12/03/2019 16:23:07		Latest Quote as discussed.

The status means we can quickly see what interactions the recipient has had with the document.

Status	Title	Company
V D C nS	Quotation - Abby for Invoices	Lemon Trading plc

In the example above our quotation has been Viewed (V), Downloaded (D), Comments have been added (C) but no Signature has been added (nS).



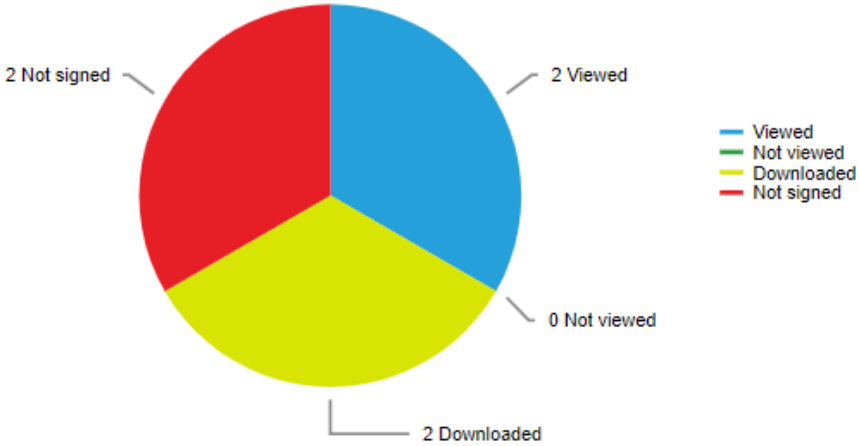
Statistics Page

The Stats page allows us to get a quick graphical view of our document interactions. If a user is part of a user group, they can also see the statistics for other users.

- Stats
- Links
- Library
- Settings

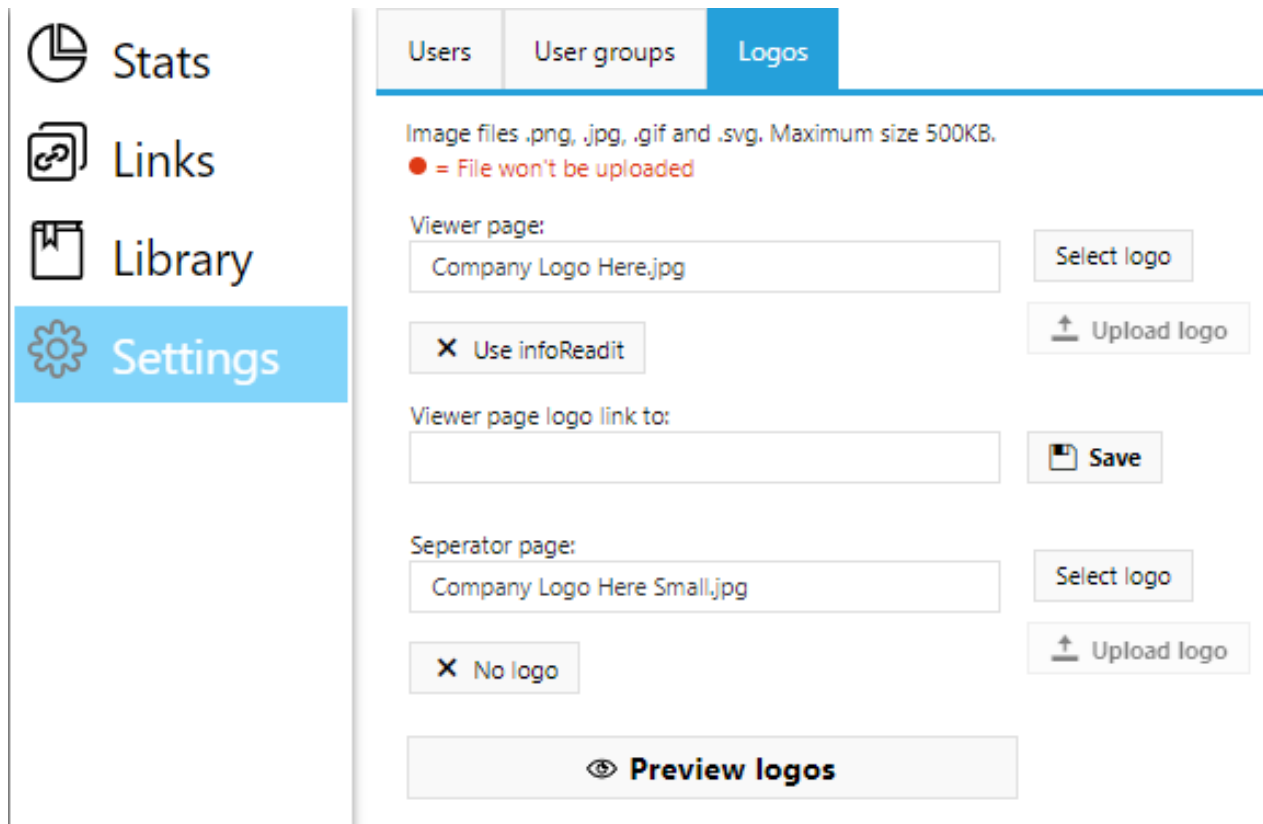
Load/Refresh Joe Hyde Date range 12/03/2019 20/03/2019

Joe Hyde - from: 12/03/2019 to: 20/03/2019



Settings

This area is only accessible by the administrator(s) of the system and allows the creation of users and user groups (e.g. teams of users). infoReadit can also be customised by adding your company logo for the main viewer page, separator page and adding a hyperlink to your website.



The screenshot shows the 'Settings' page with the 'Logos' tab selected. The left sidebar contains navigation options: Stats, Links, Library, and Settings (highlighted). The main content area has three tabs: Users, User groups, and Logos. Below the tabs, there is a warning: 'Image files .png, .jpg, .gif and .svg. Maximum size 500KB. ● = File won't be uploaded'. The 'Viewer page:' section has a text input field containing 'Company Logo Here.jpg', a 'Select logo' button, and an 'Upload logo' button. Below this is a 'Use infoReadit' button with an 'X' icon. The 'Viewer page logo link to:' section has an empty text input field and a 'Save' button. The 'Seperator page:' section has a text input field containing 'Company Logo Here Small.jpg', a 'Select logo' button, and an 'Upload logo' button. At the bottom, there is a 'Preview logos' button with an eye icon.



Costs

As infoReadit is a cloud solution which can be deployed in minutes with no upfront cost. There is also a 30 day trial available.

There are 2 versions of infoReadit:

infoReadit Lite

£9.95 per user per month

- Compose documents
- Track documents
- Allow View or Download of documents
- Statistics
- Manage document library
- 1GB limit on documents per user, 1 GB limit on Library files per user

infoReadit Business

£14.95 per user per month

All functions of infoReadit Lite plus:

- Digital Signing
- Comments
- 10GB limit on documents per user, 10 GB limit on Library files per user
- Limits on Business can be increased on an account by account basis (chargeable)

*All costs ex VAT. Billing on a quarterly or yearly cycle.



If you need more information on the infoReadit, please contact Document Genetics. We'll be happy to answer any questions, or provide a detailed demo.

30 day trial software is also available on request.

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