ADT Dealer eContract Program

SecurityTrax Provisioning Guide

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Welcome

The ADT/SecurityTrax eContract Program

ADT is proud to provide Dealers the ADT SecurityTrax eContract program and integration with DocuSign -- ADT's provider of electronic signature services.

The audience for this document is Dealer staff responsible for the provisioning – setup and testing – of DocuSign Dealer accounts in the DocuSign/SecurityTrax system.

This Guide describes the SecurityTrax Provisioning Process, which directs Dealers in bringing their organization on board the SecurityTrax eContract program. An orderly Provisioning process – information gathering, setup, and testing tasks – is required for the DocuSign and SecurityTrax systems.

- **Dealer Information** – collecting your requirements and account setup information
- **Staging Setup** – configuring your DocuSign Staging
- **Testing in Staging** – confirming that the Staging is correctly provisioned
- **Production Setup** – provision the Production account and migrate Staging into Production.
- **Go Live** – begin using the Dealer/SecurityTrax eContract solution.

Your DocuSign Accounts

DocuSign, Inc. is ADT's vendor for e-signature services. DocuSign provides the workflow engine that securely creates e-contracts for signing, manages the e-contract workflow, and delivers signed contract files to ADT for archiving. DocuSign also keeps a backup archive of e-contracts.

DocuSign System Accounts

Two DocuSign System Accounts – Staging and Production – are required for eContracts, each configured with:

- Individual Dealer branding
- Configuration settings for integration between ADT and DocuSign
- User Accounts for sending e-contracts and individual login to the DocuSign Console
- DocuSign "Contract Templates" (with the forms) that generate "Contract Envelopes", which move between recipients in the e-signature workflow.

Staging Account: This is the DocuSign system account where development and testing occur. When the Staging Account ready, as confirmed by testing, the Staging Templates are migrated to Production.

Production Account: This is the DocuSign system account where Production Templates live, and where each e-contract is created in an e-contract workflow Envelope. As the name suggests, the Envelope is passed, with contract forms, from recipient to recipient until Completed by the Dealer Back Office.

User Accounts

The DocuSign accounts (both Staging and Production) contain User Accounts for login to the DocuSign Console. Login into a User Account provides security and accountability of actions recorded in Envelope History.

Service Account: This is the user account in which API integration generates e-contract envelopes, and in which envelopes are managed. Direct login to the Service Account is for special administrative tasks only. However, many staff can have limited "Shared" access to envelopes in the Service Account from their personal user account login.

1. **The Service Account** is used by the SecurityTrax API to generate Envelopes, and is the DocuSign account from which eContracts are sent. It is not intended for you log into via the DocuSign Console; rather you should access eContracts using your own user account.

2. **Back Office Account:** a user who manages the Back Office account will pick up the signing task in a Notification Email with a link to the contract, or by logging in directly to the Back Office account to monitor the account Inbox.

Back Office Account: Account for the final Recipient in the e-contract workflow - the "Dealer Authorized Representative". Login to the Back Office user account is part of the eContract workflow.

Personal User Accounts: Dealer staff who need to view contract workflow history or view the contract in Production.

Roles

Dealer: Provide Dealer configuration information in the Provisioning Form. Also conduct Testing in Staging, sent to the Auditor.

Dealer Contract Provisioning: Provide configuration information and participate in setting up the DocuSign Accounts and User Accounts.

Auditor/Testing: Receives test envelopes from the Dealer to audit the Staging account and confirm that Staging is ready to migrate to Production.

SecurityTrax: Provide setup of the Production account and other issues.

Sales Rep: The work flow envelope recipient who signs independent of the installation.

Technician: The workflow envelope recipient who signs as confirming the installation. The technician also sometimes acts in the role of the Sales Rep.

Back Office (Dealer Authorized Representative): final signer in contract workflow. This role reviews and confirms the contract, and resubmits the contract if there is serious issue.

Account Access

User Accounts are created in the Staging and Production Accounts to allow dealer representatives access to eContracts in DocuSign.

Account Activation

Each user account is activated by sending an Activation Email to the account-holder to authenticate their identity and to set up a personal password for the account.

3. **Sharing User Accounts:** Access to the Service Account is provided by "sharing" the Service Account with each user. Upon logging into DocuSign, the user selects "Manage" from the menu:

And then "Shared" from the menu presented on the left-hand side of the page:

User Account Change Request

To request additional user accounts in Production, or to change the permissions of a user, a Dealer will submit the following information.

- **Dealer Name**

- **Dealer Number:** ADT Master Dealer Number

- **Account Users:** Users needing access added or removed to view eContracts created in Production Account via DocuSign console.

Dealer Name		
Dealer Number		

Account Users			
	Name	Email Address	Add/Remove Access

Account Provisioning Workflow

Provisioning Form

Account provisioning is the process by which information is gathered and DocuSign accounts configured and tested – leading finally to the Dealer live in Production.The Dealer eContract Provisioning Form supports that process.

To add a new Dealer, the Dealer contacts ADT requesting eContract services.
Subject to approval, this will initiate the provisioning process.

The Provisioning Form has four sections, corresponding to the stages of setup.
Only Section A, Dealer Information, will be covered in this guide.

- A. **Dealer Information:** provided by the Dealer as input to the provision process.
- B. **ADT Staging Setup:** provided by ADT to SecurityTrax after ADT finishes Staging setup.
- C. **Testing in Staging:** ADT Audit approves Test envelopes sent by the Dealer.
- D. **ADT Production Setup:** provided by ADT to SecurityTrax after ADT sets up Production.

Dealer Information

1. **The Dealer must create two email accounts on their domain.** The email accounts must be active and ready to receive email prior to provisioning.This will provide email addresses as the account name of two operational user accounts in Staging and Production.
(Also see "Valid Domains and Email Addresses" at the end of this document):

   - Email Domain Option: If you do not have an individual Dealer domain (for web site and email), contact ADT for discuss getting one at domain.com.

   - **Email Sender White-list:** The manager of your email domain will need to be informed that emails should be trusted when coming from t.he DocuSign email domain.

      #### Service Account

   - docusign@yourdomain.com" or "docusign.dealernumber@domain.com. Email address for DocuSign user account from which all eContracts are sent. An email account must be created on your domain in the form docusign@yourdomain.com or docusign.dealernumber@domain.com.

   - This address will receive many emails including notifications when an eContract envelope has been completed. Completion emails include copies of the signed documents as attachments.

      #### Back Office Account

   - This is the DocuSign user account from which back office activities are conducted (contract review and signing) to complete the eContract.

   - An email account must be created on your domain in the form dsbackoffice@yourdomain.com or dsbackoffice.dealernumber.

   - This email will be used for signing into DocuSign Console to conduct back office activities.

Dealer Information (continued)

2. **The E-contract Provisioning Form is sent to the Dealer.** After the Dealer completes the prescribed email setup and data input tasks, they will have the information necessary to complete their data entry task in the provisioning form.

Dealer eContract Provisioning Form
DocuSign Integrator – SecurityTrax

Dealer Information	The following information must be supplied by the dealer prior to ADT provisioning in DocuSign
Dealer Name	Name of Dealer
Dealer Number	ADT Master Dealer Number
Company Logo	Please attach an image of your company logo[*]
Key Business Contact	Name of key business contact within your dealership for eContract matters
Email Address	Email address for key business contact
Phone Number	Phone number for key business contact
Key Technical Contact	Name of key technical contact within your dealership for eContract matters
Email Address	Email address for key technical contact
Phone Number	Phone number for key technical contact

Service Account Email Address		Email address for DocuSign user account from which all eContracts are sent[*]
Back Office Email Address		DocuSign user account from which Back Office activities are conducted to complete the eContract[*]
SecurityTrax URL (Optional)		Dealer SecurityTrax Profile

Account Users	Users needing to view eContracts created in Service Account via DocuSign Console	
	Name	**Email Address**

Sales Models Employed	Please indicate whether your dealership employs fields sales, phone sales or both	
	Field Sales Model [X]	Contracting is started when sale is made in the field and later completed at time of installation by the installer
	Phone Sales Model [X]	Contracting is completed in its entirety at time of installation by the installer

Submitted By: _____

Date Submitted: _____

Submit Completed Form and Logo to: _____

Copy to: _____

Dealer Information (continued)

3. **The Dealer completes Section A – Dealer Information**

   - **System account email addresses:** Service Account and Back Office Account.

   - **Dealer Details:** Name, Number, Company Logo, Sales Models (Phone, Field)

   - **Key Contacts:** Business and Technical Contact details.

   - **User Accounts:** Identify all staff who will need to view contract progress in Envelope History, or to view the contract formsin Production. Each email address will be a User Account username for their use. All users have View-only access.

   - **Dealer Logo:** Provide a Dealer Logo file by attaching in an email to the sender of the Provisioning Form. The logo file is used to brand the DocuSign Console and in communications sent to eContract users and recipients. Provide an image (.png, .jpg, .bmp or .gif) that is <= 100kb and as close to 148x38 pixels as possible.

   - If you don't have an individual Dealer logo, we will use the default ."ADT Authorized Dealer" logo.

ADT Staging Audit

1. **Dealer Test Envelopes**

   - When Staging setup if finished, the Dealer will be promoted to start Staging Tests.

   - The Dealer must submit at least three envelopes to ADT Audit from Staging.

2. **ADT Audit Approval of Test Envelopes**

   - ADT will confirm that the templates and system environment have been successfully submitted for audit process by the Dealers then they will be considered to be promoted to Production.

Go Live

Go-Live is an important milestone when implementing eContract. Prior to this milestone, the following is required:

- Test envelopes have been successfully delivered in demo
- Dealer Demo account is migrated to the ADT Production account

Go-Live Support

- Dealer Support (lroberts@adt.com)
- SecurityTrax contact (travisghansen@hivalley.com)
- Dealers will be given an all-day ADT hotline accessible by anyone on your team who Reference

Provisioning Form Details

	Fields	Explanation
1.	**Dealer Name**	Name of Dealer
2.	**Dealer Number**	ADT Master Dealer Number
3.	**Company Logo**	Please attach an image of your company logo The logo is used to brand the DocuSign Console and in communications sent to eContract users and recipients. Please provide an image (.png, .jpg, .bmp or .gif) that is <= 100kb and close to 148x38.
4.	**Key Business Contact**	• Name • Email Address • Phone
5.	**Key Technical Contact**	• Name • Email Address • Phone
6.	**Service Account Email Address**	Email address for DocuSign user account from which all eContracts are sent. An email account must be created on your domain in the form docusign@yourdomain.com or docusign.dealernumber@domain.com. This address will receive many emails including notifications when an eContract envelope has been completed. Completion emails include copies of the signed documents as attachments.
7.	**Back Office Email Address**	DocuSign user account from which back office activities are conducted to complete the eContract An email account must be created on your domain in the form dsbackoffice@yourdomain.com or dsbackoffice.dealernumber. This email will be used for signing into DocuSign Console to conduct back office activities.
8.	**SecurityTrax URL (optional)**	Dealer SecurityTrax profile
9.	**Account Users**	Staff who will need user accounts: • Role (to indicate permission level) • Name • Email Address (for the account username)

Frequently Asked Questions

	Question	Answer
1.	How long before we can go live?	This answer will vary for each dealer. There is a learning curve to DocuSign, API Certification, and overall business practices that need to be defined before the first official transaction.
2.	How many test envelopes will the Deal need to submit to Staging Audit?	The number of test envelopes will depend on which Sales Models are in force and other factors. Testing will conclude when the full range of contract functionality has been successfully demonstrated for Audit sign-off – much like the Audit process for each contract in production.
3.		
4.		
5.		
6.		
7.		

What are the trusted Domains and IP addresses I will receive email from?

To avoid DocuSign emails from being blocked as spam by your email system, Dealers should allow access to the following email domains and specific IP addresses:

Valid Domains

- dse@docusign.net
- @docusign.net
- @docusign.com

IP addresses

- mailsea.docusign.net 209.67.98.59 - Production Mail Server Seattle
- mailch.docusign.net 206.25.247.155 - Production Mail Server Chicago
- mailda.docusign.net 209.46.117.179 - Demo/Preview Mail Server
- mailcl.docusign.net 108.175.18.45 - Production Mail Servers Seattle, Dallas and Chicago
- mailcl.docusign.net 108.175.30.45 - Production Mail Servers Seattle, Dallas and Chicago