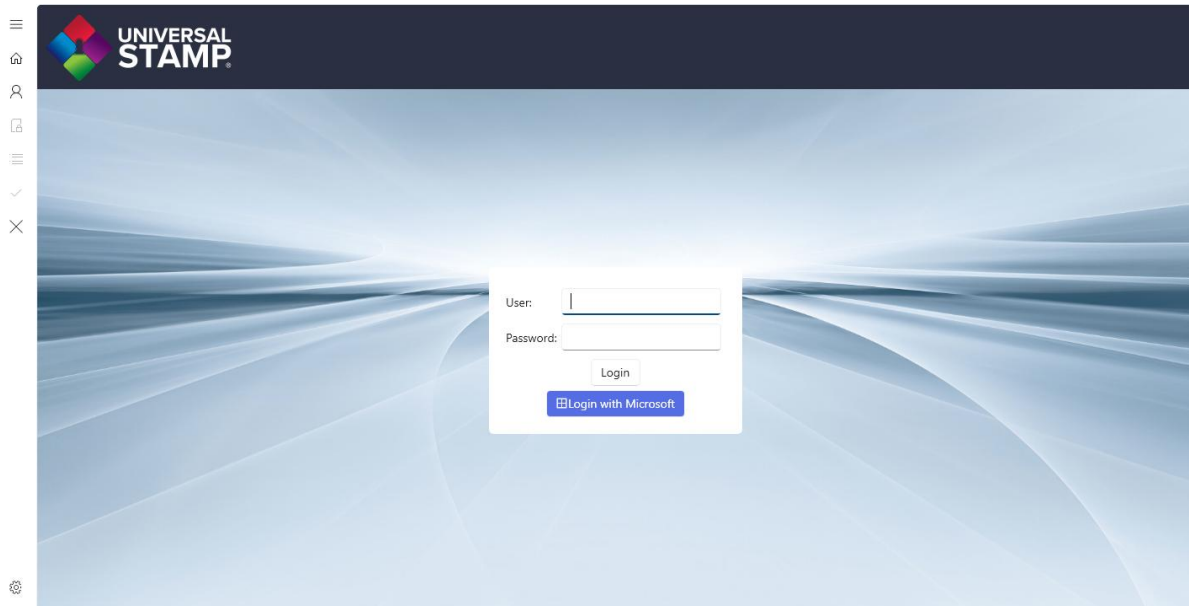


This document outlines how to affix a digital Medallion Signature Guarantee to a document and send it to a transfer agent / recipient.

1. Log-in

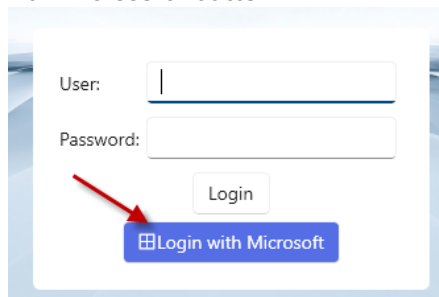
Once launched, the app will offer a button to login. Click on that button, and a login form will be displayed:



Enter the username and password provided by Hampton Technologies, and click on the “Login” button. Then you will see a request to enter a PIN code. Check your e-mails and you should find an e-mail from Universal STAMP® which contains a six-digit PIN. Enter the PIN into the form:

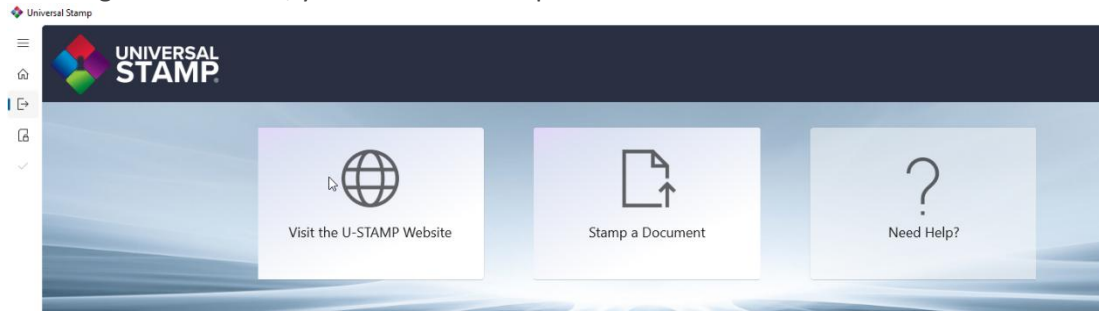


Alternatively, you can click on the “Login with Microsoft” button:



In this scenario, you will need to login using your Microsoft 365 credentials (usually your E-Mail address and the Microsoft password)

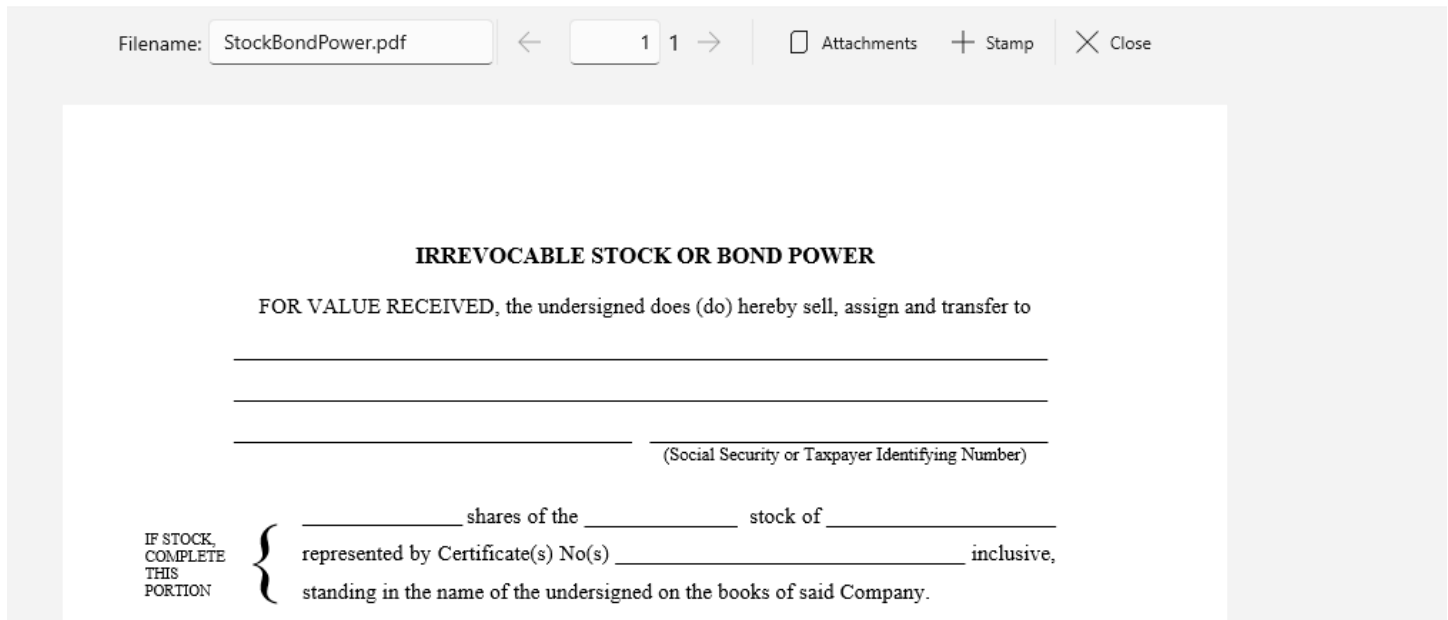
If the login is successful, you will see U-Stamp's main screen:



2. Processing a document

To process a document, click on the "Stamp a Document" button. You will be prompted to select a document from your local computer (or network location).

Once you select a PDF document, it is displayed in the U-Stamp App:



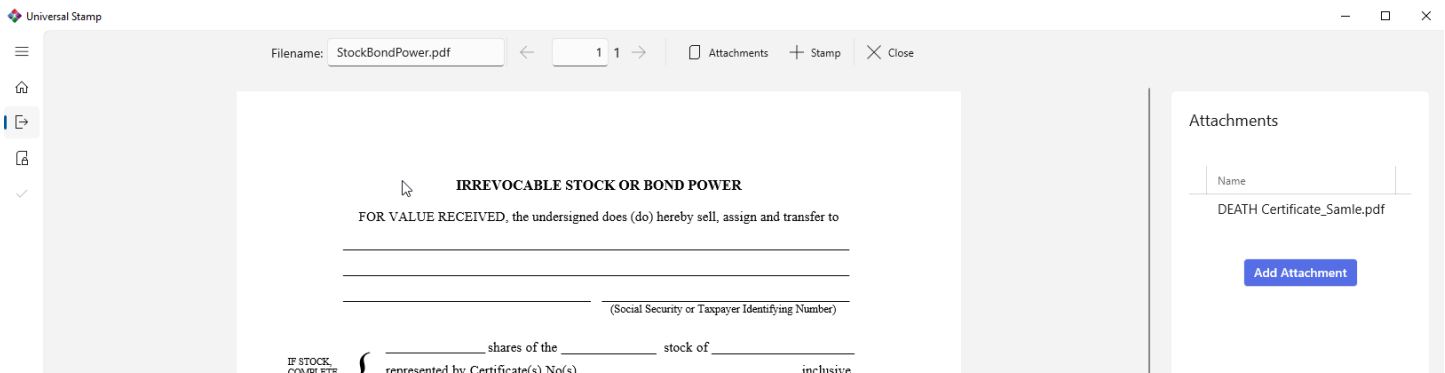
The toolbar at the top allows for

- Changing the file's name
- Navigating through pages
- Attaching supporting documentation to the document
- Adding a Digital Universal STAMP
- Closing the document

Adding Attachments

CAUTION: This must be completed before applying a stamp to the document!

Click on the "Attachments button at the top, then click on "Add Attachment" within the attachments panel (right side). You will be prompted to select a file to attach. U-Stamp will suggest PDF files, but you can pick any type of file, e.g., JPG or PNG files. After you select a file, it is attached, and appears in the attachments' panel:

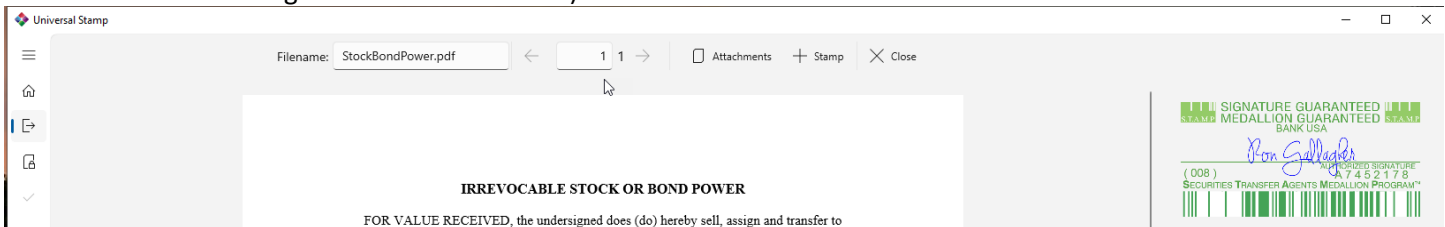


Applying a stamp

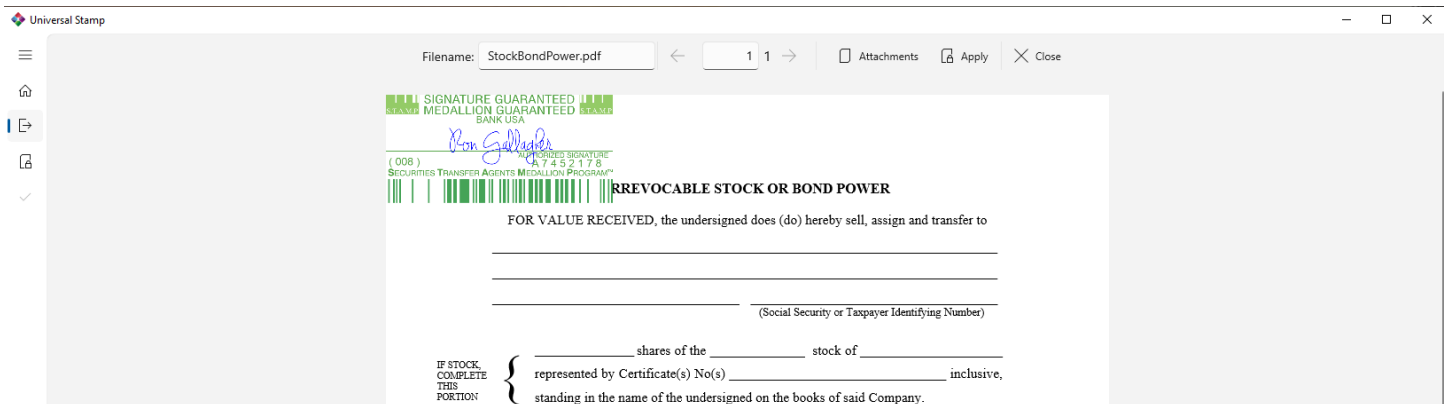
CAUTION: This is always the final action performed on a document. Changes after this step will trigger the medallion's security warning features.

To apply a medallion, click on the "Stamp" button in the top toolbar.

The "Medallion" panel is displayed to the right. Click on a medallion you want to use (usually there will only be one, but in some cases a user might have more than one).

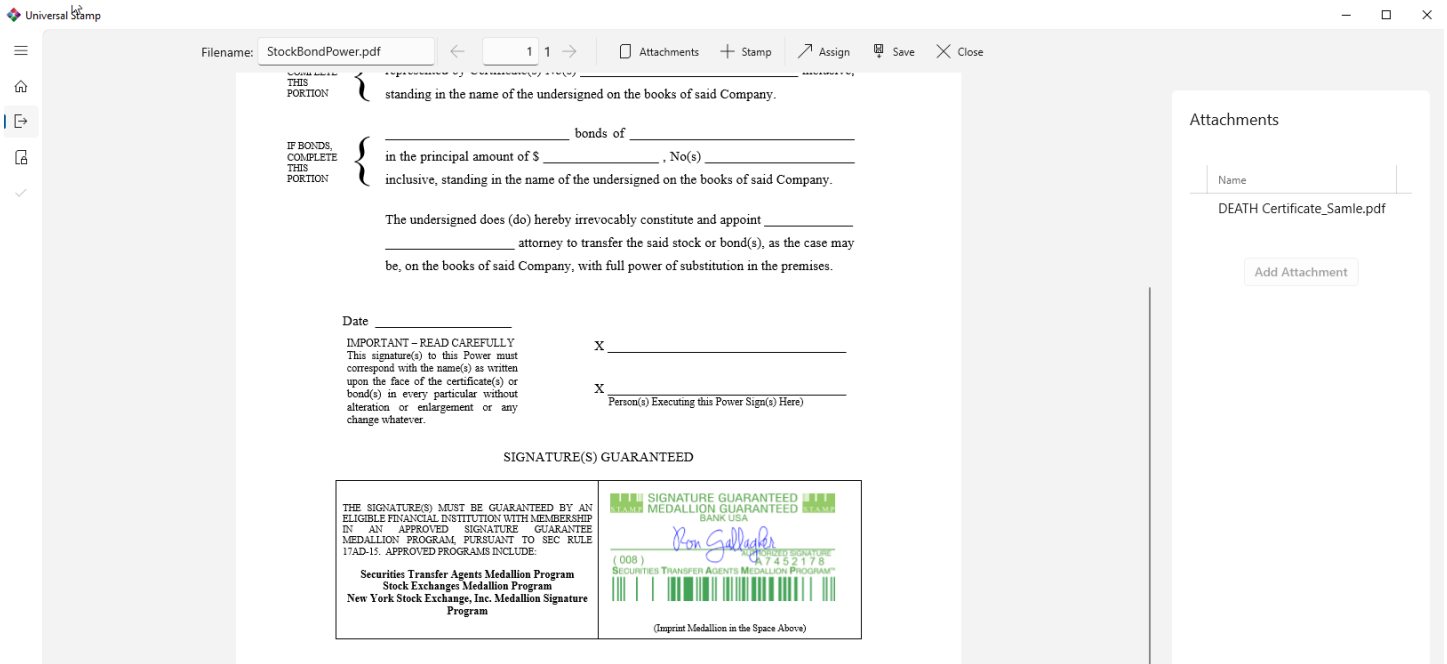


Once you select a medallion, an image (imprint) is created at the top left of the document. (CAUTION: you might have scrolled all the way down, so you won't see the imprint)



From the top left corner of the current page, drag the imprint to where you want it applied. You can move it as many times as you need to. If it is at the desired position, click on the "Apply" button.

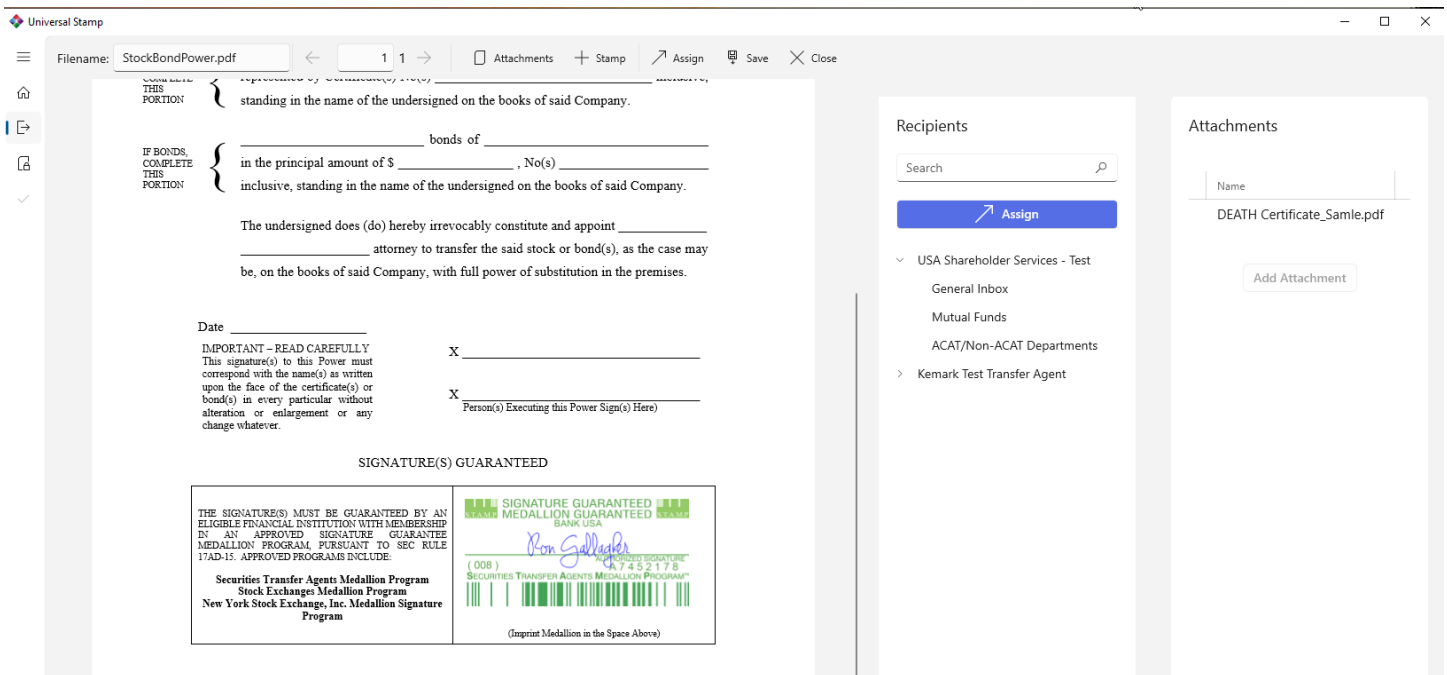
The medallion is now affixed to the document, and the document is locked down. After a few seconds you should see the spinning circle disappear, and the document is finished.



Now you can either save the document to a local drive and send it by e-mail or by any means of transportation you might prefer. Alternatively, if the recipient is offering “Inboxes”, you can assign the document directly to them.

3. Assign a document

Clicking the “Assign” button in the top toolbar will display the “Recipients” panel:



Select a recipient, and, if applicable one of its inboxes and click on “Assign” in the Recipients panel. After a few seconds, the document will be transferred to the recipient’s inbox, and it will be notified by e-mail. At this point you can click the X Close to return to the main screen.

Screen Scaling

For Windows systems with the screen scale set to anything but 100%, the position and size of the digital imprint are corrected now.

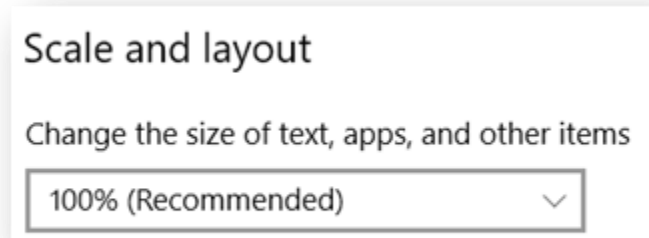


Figure 1: Windows Settings – Set Screen Scale

For Windows systems with multiple monitors, the detection of the screen scale is unreliable, especially when the app is run on a monitor other than the primary monitor. For these scenarios, a setting in the app itself is implemented that will force the app to use a certain scale.

