

User guide

Digital Document Exchange (DDE)

The platform for digital document exchange (DDE) made available to clients by UniCredit Bank can be accessed using the following UniCredit Digital Document Exchange link :

[UniCredit Digital Document Exchange.](#)

1. Login:

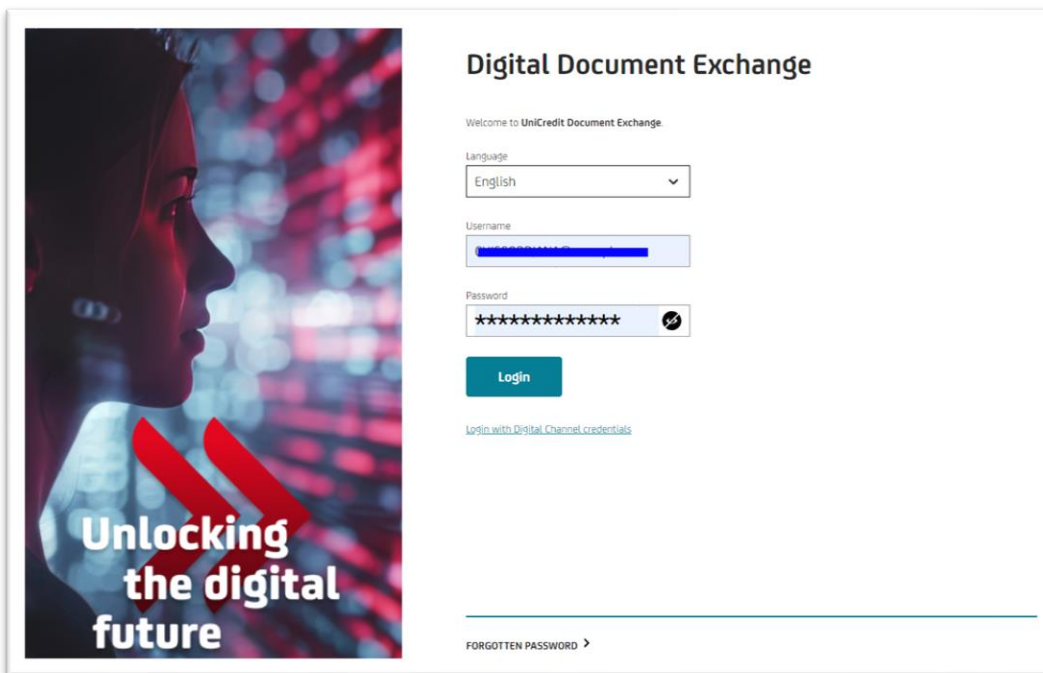
At the time of registration, you will receive an e-mail to the address provided to the bank with all the details of the first login.

Login can be done in the main DDE screen by:

- **Fill in the 2 available fields:**

Username: enter the assigned username (e-mail address declared in relationship to the Bank)

Password: enter the temporary password received via SMS on the phone number declared in the relationship with the Bank.



Digital Document Exchange

Welcome to UniCredit Document Exchange.

Language
English

Username
[Redacted]

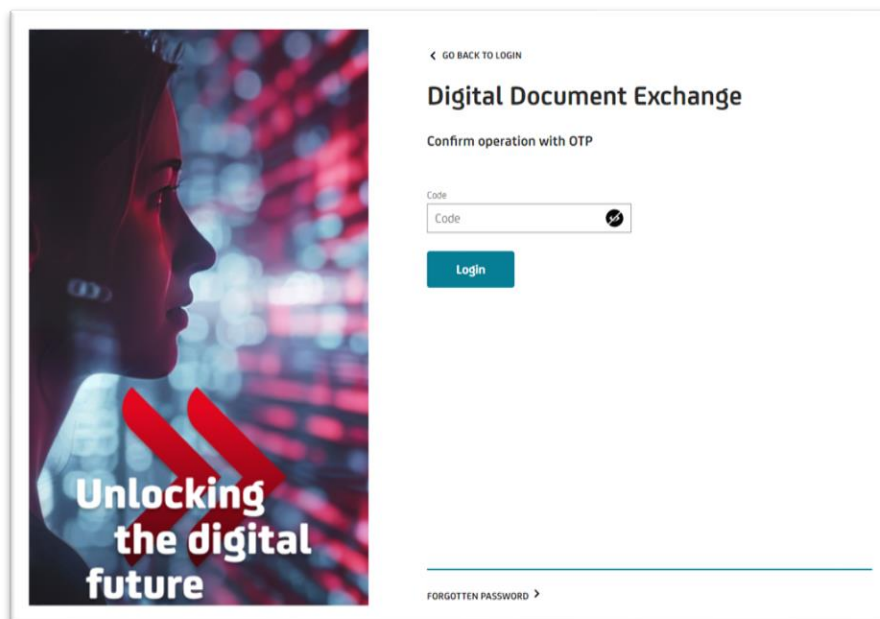
Password

Login

[Login with Digital Channel credentials](#)

[FORGOTTEN PASSWORD >](#)

The **Login** button will be accessed and in the next step the unique code received via SMS (valid for 5 minutes) will be entered and the **Login** button will be accessed again.



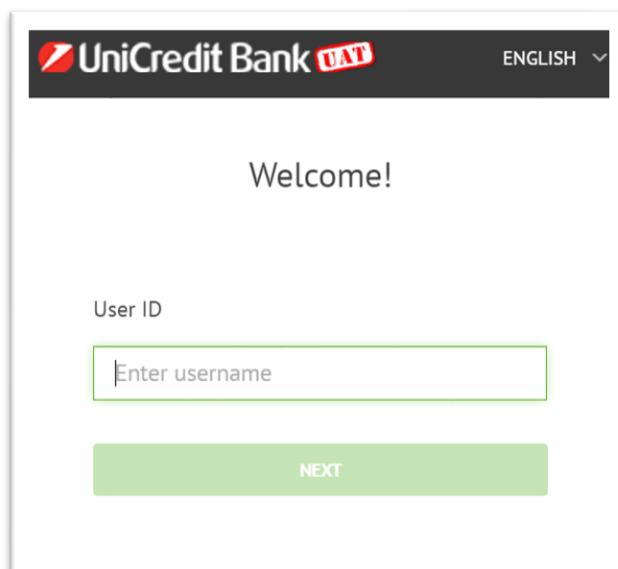
The image shows a login interface for the Digital Document Exchange (DDE) platform. On the left, there is a vertical banner with a woman's profile looking at a digital display, with the text "Unlocking the digital future" at the bottom. The main content area on the right has a header "Digital Document Exchange" and a sub-header "Confirm operation with OTP". Below this is a "Code" input field with a "Code" label and a "Login" button. At the top left of the main area is a link "GO BACK TO LOGIN". At the bottom is a link "FORGOTTEN PASSWORD >".

Afterwards, a new window will open for changing the initial password and you will be able to enter and confirm a new password of your choice for the DDE platform. This change will be confirmed with a new OTP code sent via SMS.

When logging in for the first time in DDE, it is necessary to sign the "Terms and conditions for using the DDE platform" document.

➤ Login with Digital channel credentials

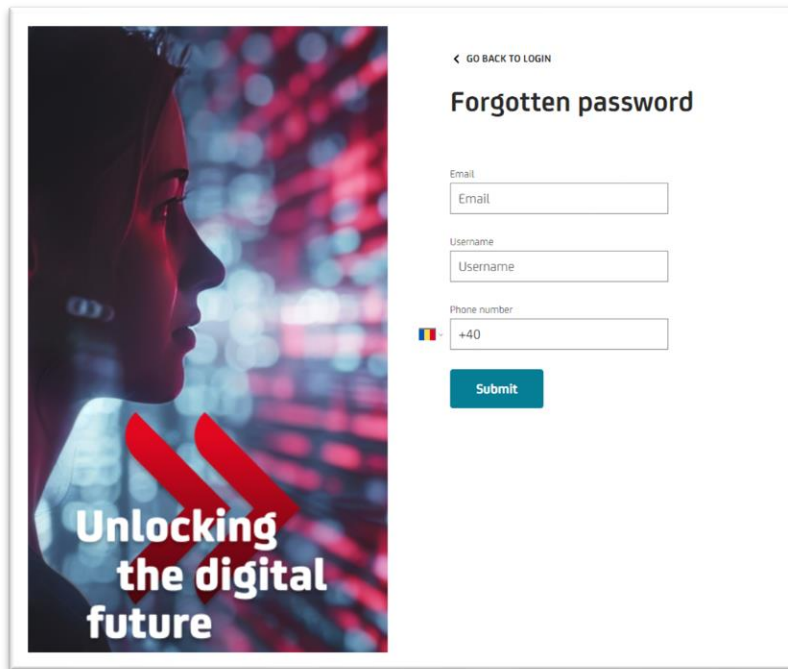
The link to this type of authentication can be found on the main page of the platform under the main authentication method with user and password. This login requires the possession and activation of the UniCredit Internet Banking service - BusinessNet - in advance.



The image shows the UniCredit Bank UAT login screen. At the top, there is a header with the UniCredit Bank logo and "UAT" in a red box, and a language selector "ENGLISH" with a dropdown arrow. Below the header, the text "Welcome!" is displayed. Underneath, there is a "User ID" label and a text input field with the placeholder "Enter username". Below the input field is a green "NEXT" button.

Forgotten password

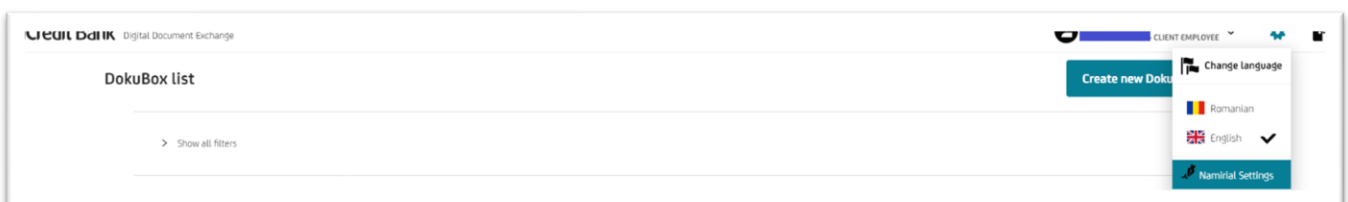
If you have forgotten your password, you can update it by accessing the **Forgot Password** button at the bottom of the main screen, filling in your email, mobile phone and DDE username (ie your email) and pressing the **Submit** button. Next, you will receive a temporary code via SMS on the phone number indicated in relation to the Bank, which you will fill in the platform. And this password will have to be changed at the first login.

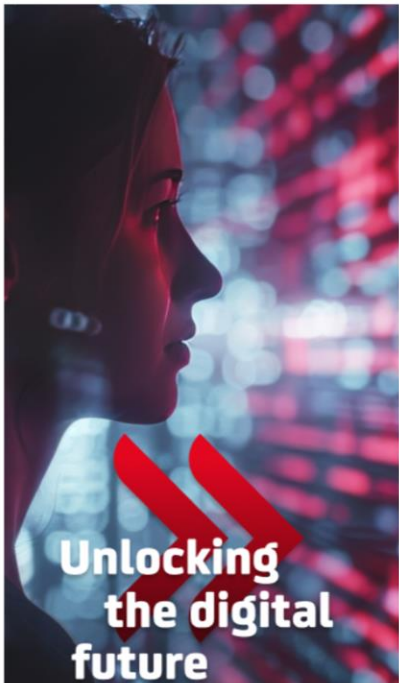


If the password is blocked after 3 failed attempts, the unlocking will be requested by Kind request form sent to the Relationship Manager in the Dedicated Branch or by BusinessNet messaging, by indicating of the name of your relationship manager and the branch in the subject.

2. Configuring the Namirial certificate in DDE

The details of the Namirial digital signature certificate (user ID and device ID) must be entered in the Namirial Settings section, at the top of the main page under user details.





[< GO BACK](#)

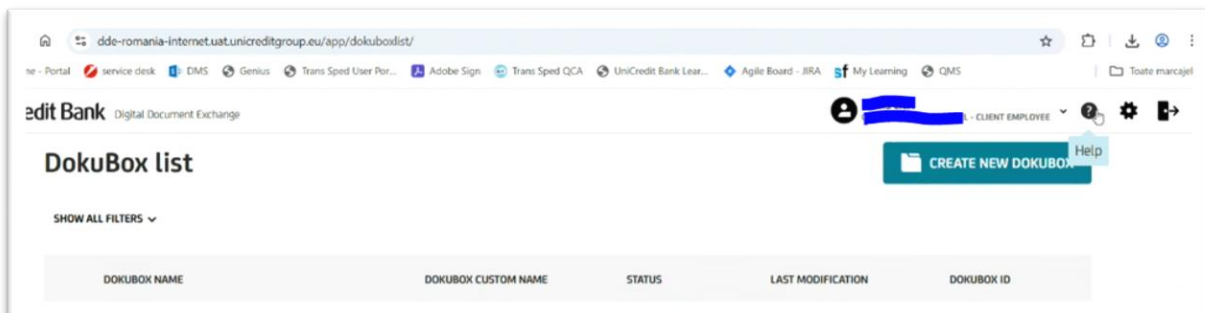
SETTING NAMIRIAL USER ID AND NAMIRIAL ID

DEVICE ID

USER ID

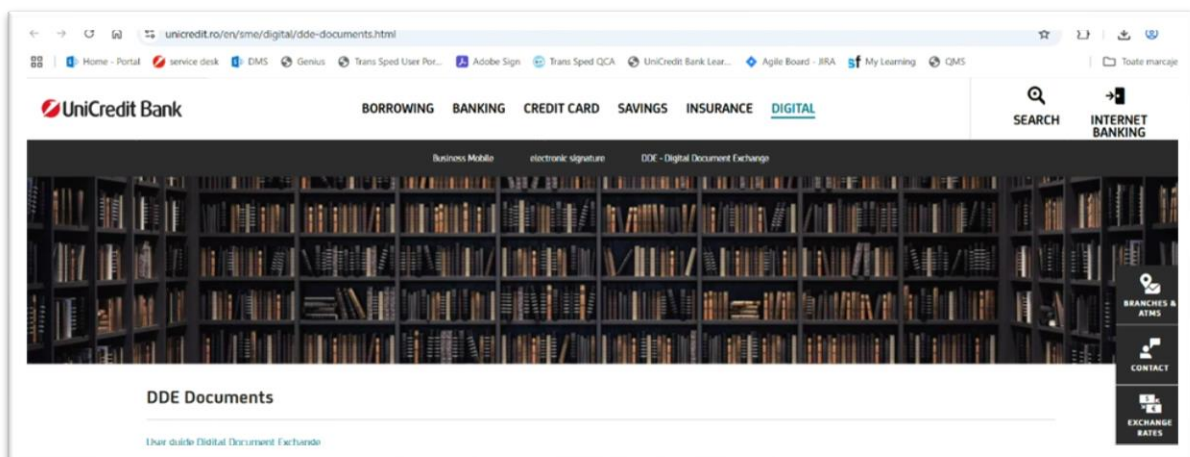
Submit

Note: To consult the guide and other helpful documents, access the ? button at the top right of the main screen.



The screenshot shows a web application titled "edit Bank Digital Document Exchange". The main heading is "DokuBox list". Below it is a "SHOW ALL FILTERS" dropdown. A table with five columns is visible: "DOKUBOX NAME", "DOKUBOX CUSTOM NAME", "STATUS", "LAST MODIFICATION", and "DOKUBOX ID". On the right side, there is a user profile icon, a "CLIENT EMPLOYEE" dropdown, a "Help" button, and a "CREATE NEW DOKUBOX" button.

DOKUBOX NAME	DOKUBOX CUSTOM NAME	STATUS	LAST MODIFICATION	DOKUBOX ID
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3. Dokubox management

After successfully logging into the DDE platform, you will be able to see the documents submitted for signature by the bank and you will be able to sign and send them back to the bank.

The DokuBox is a digital package containing one or more documents sent by the bank in order to be signed. In DokuBox list you will find the list of DokuBoxes to which you have been selected by the bank as a participant. The list can be filtered according to several criteria (for example: status, date, etc.)

For a dokubox the following options are available::

-  for more details;
-  view Dokubox
-  edit DokuBox (option usually used for signing the package of documents)

DokuBox list

Create new DokuBox

> Show all filters

DOKUBOX NAME	DOKUBOX CUSTOM NAME	STATUS	LAST MODIFICATION	DOKUBOX ID	
 SLT ALL		IN PROGRESS	14.10.2024, 12:32	8851	 
0F01A84F-4A58-448C-9324-8665D39FFF8A					
DOKU NAME	STATUS	CURRENT USER	UPLOADED BY	LAST MODIFICATION	
EN - DOKU SCENARIO 12	WAITING BANK SIGNATURE			14.10.2024, 12:32	

DokuBox list

Create new DokuBox

▼ Show all filters

DokuBox name

DokuBox custom name

Date range from/to

DokuBox ID

DokuBox status

In progress

×

▼

Doku status

▼

Document name

Reset all

Search

4. Signing a document with Namirial certificate

Documents to be signed with a Namirial certificate in the status "awaiting signature from the client" will have a **Sign with eSaw** button that must be activated.

Careful! The content of the documents must not be modified, as it includes a digital mark that ensures the integrity of the content. Any modification will invalidate the document and it will no longer be able to be uploaded to the DDE platform.

In the next step, select the preconfigured certificate in DDE (Namirial Settings) and enter the device password and the unique code (received via SMS).

After applying the signature on the document, press the **Submit Action** button so that the document continues the signature flow defined by the bank.

After all the participants from the client's side sign the documents associated with the dokubox, a new **SEND TO BANK** button will be available, which must be activated together with the **SUBMIT** button.

[< BACK](#)DOKUBOX ID: 9001

slt all IN PROGRESS1 DOCUMENTS AVAILABLE

Product Category: Packages

1. EN - Doku Scenario 12

 WAITING CLIENT SIGNATURE 

EN - Bank and Client Signature Needed.

 Proiect Anonimizare date.pdf 

 Sign with eSAW

Submit Actions

Cerere securitate de la expeditor 

Expeditor: [RO DDE Org Admin](#)

Documente: DDE_RO_640017_dokubox_PROD_11231_10371

Fișiere: b967751b-6739-4c24-bfff-97bd670facf2.pdf

Expeditorul cere să vă verificați identitatea cu următoarele:

OK

User ID

DISCLAIMER

RENUNȚ

Parola dispozitivului

Cod unic

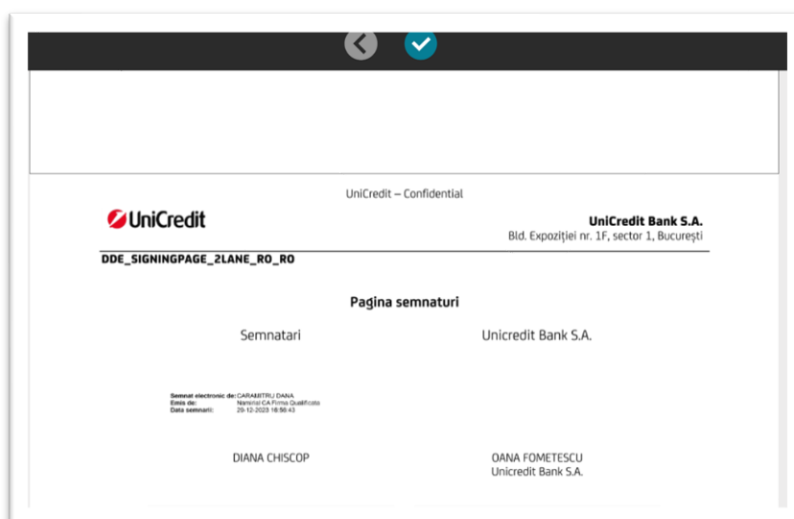
366380

Tranzacția dvs. (ID: JUubjgqAtG) expiră peste 4:27

Semnat electronic de: CARAMITRU DANA
Emis de: Namirial CA Firma Qualificata
Data semnarii: 29-12-2023 16:47:15

RENUNȚĂ

SEMNEAZĂ



Finalizează semnarea documentelor

Totul a mers perfect. Confirmi semnarea documentelor?

RENUNȚ

FINALIZEAZĂ

DokuBox list

Create new DokuBox

> Show all filters

DOKUBOX NAME	DOKUBOX CUSTOM NAME	STATUS	LAST MODIFICATION	DOKUBOX ID
 SLT ALL		IN PROGRESS	15.10.2024, 16:01	9001 
0F01A84F-4A58-448C-9324-8665D39FF8A				
DOKU NAME	STATUS	CURRENT USER	UPLOADED BY	LAST MODIFICATION
EN - DOKU SCENARIO 12	WAITING BANK SIGNATURE	DIANA CHISCOP	OANA FOMETESCU	15.10.2024, 16:01

< BACK

DOKUBOX ID: 8721

Micro ro

IN PROGRESS

1 DOCUMENTS AVAILABLE

Product Category: Loan request and query agreements

DOKUBOX MORE OPTIONS

1. TEST 1234



WAITING ARCHIVAL



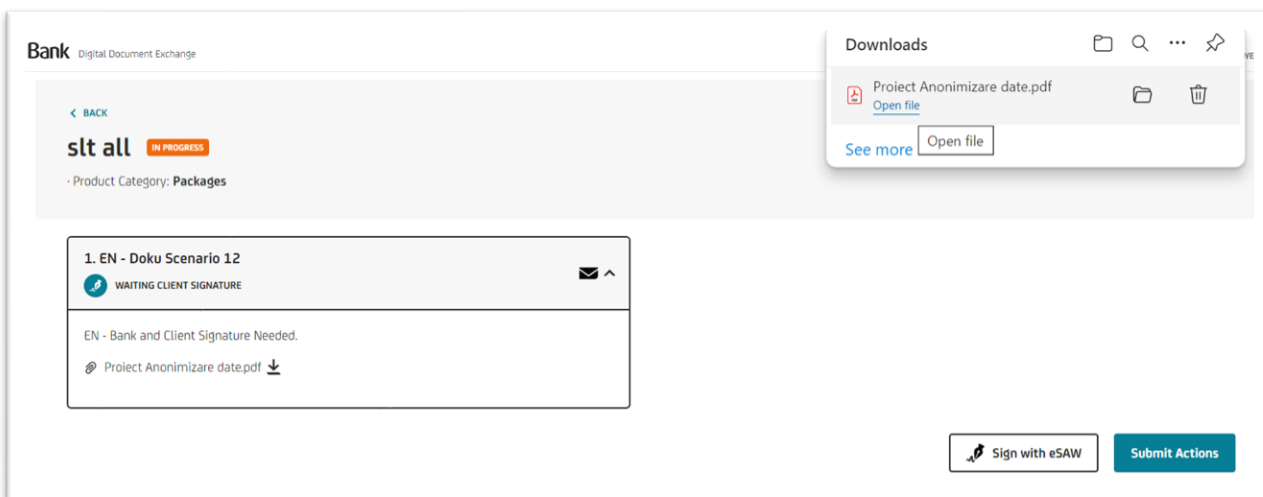
14329409_B01_157.pdf

Submit Actions

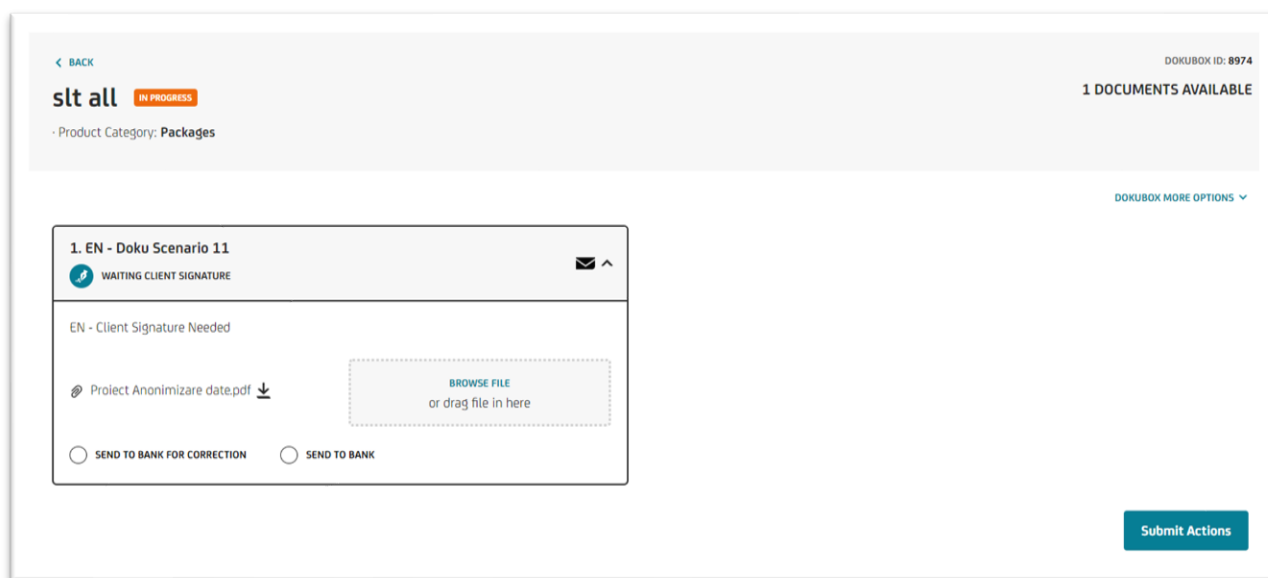
5. Signing a document outside DDE with any electronic certificate issued by a supplier on the EUTL list (except Namirial)

After receiving the e-mail notification that a document has been received for signing in the DDE platform, you will log in the platform and on the main screen you will be able to view the document. The download button to the right of the document name will be pressed, and, depending on the settings of the browser used, the file will be opened from the Download folder or from the browser and the document will be saved with Save As on the workstation (the "Print to pdf" option will not be used).

Careful! The content of the documents must not be modified, as it includes a mark that ensures the integrity of the content. Any modification will invalidate the document and it will no longer be able to be uploaded to the DDE platform.



You have to go back in the DDE platform after you signed the document.



The signed document will be loaded in the platform by searching for it through **Browse file**, or using the **Drag and drop** option (drag the document into the box), then press **Send to Bank and Submit**.

After this step, the documents reach the bank's representatives to be validated and signed.

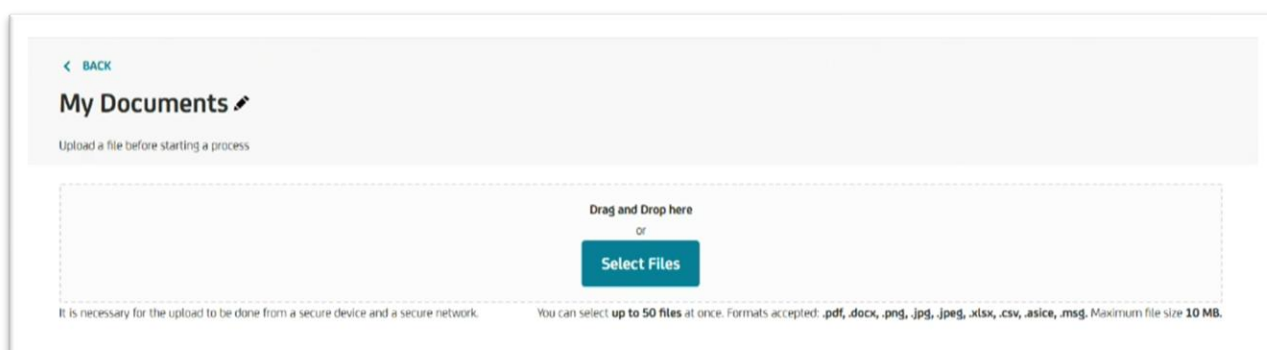
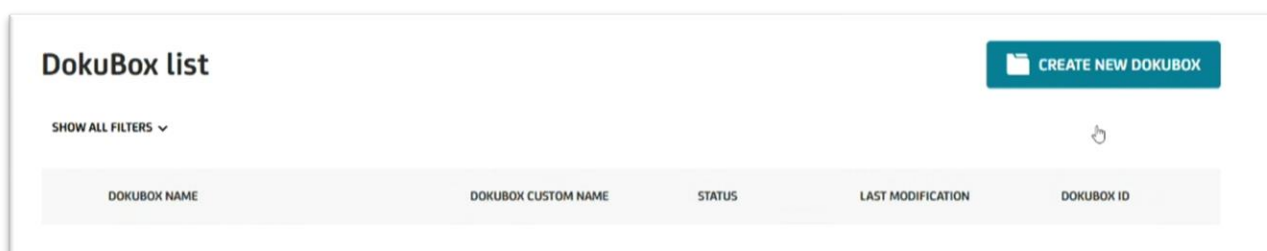
After signing the documents by the bank, you will receive an email notification (if this option is set in the system, according to the option in the authorization form) and you will be able to download these documents from DDE through the **Download** option.

Only the client participants of that docubox can view and download the documents, so please consider archiving the signed documents according to your rules as soon as possible.

6. Sending a package of documents to the Bank

By clicking the **Create new docubox** button, you can initiate the transmission of documents to the Bank. Select the documents you want to send, fill in the necessary fields (Description) and click the **Send to Bank button**.

After sending, the docubox will be configured by the Bank and depending on the type of document uploaded, it is possible that a signature via digital certificate may also be requested.



[< BACK](#)

My Documents

Upload a file before starting a process

Drag and Drop here

or

Select Files

It is necessary for the upload to be done from a secure device and a secure network.

You can select **up to 50 files** at once. Formats accepted: **.pdf, .docx, .png, .jpg, .jpeg, .xlsx, .csv, .asice, .msg**. Maximum file size **10 MB**.

 **1. Adeverinta.pdf** | 164KB

 UPLOADED 

File Name

Adeverinta

Description for the bank

Please insert

 **2. Cerere revenire.jpg** | 62KB

 UPLOADED 

File Name

Cerere revenire

Description for the bank

Please insert

Total files: **2**

 CLEAR LIST

 **Send to bank**