Docusign Activation through Forms Logic

- Each Advisor will be given their own personal Docusign account specific to Forms Logic and WWA.
- Note that you can only use this specific Forms Logic Docusign account to sign paperwork under WWA. Other outside Docusign accounts you may already have will not work to submit paperwork.
- Before you submit your first DocuSign envelope through Forms Logic, there are two steps you must complete:

Step 1: Set Forms Logic as default Docusign
Step 2: Create the Digital Handshake

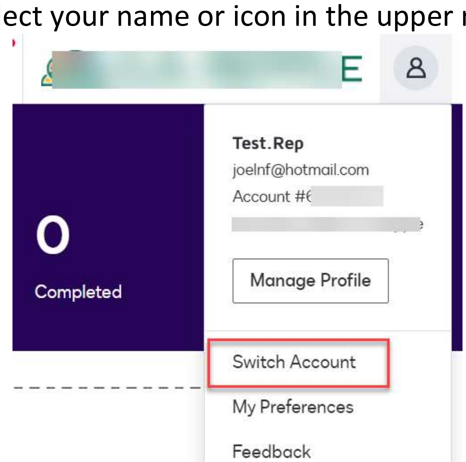
Step 1: Set Forms Logic as default Docusign

1. You will receive an email invitation titled "Account Activation". **Click to Activate your personal DocuSign.** ***Do not skip this step. If you skip it, the rest of the instructions will not work.***
2. Use the Forms Logic code **1315** when prompted.
3. Set Forms Logic Docusign as your default account following steps A thru E below:

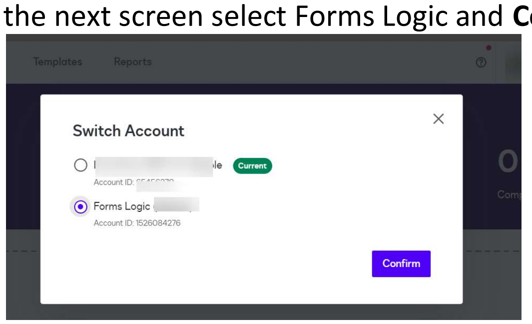
Please Note:

- *If this new Docusign account through Forms Logic is your **first and only** Docusign account (you do not have any separate Docusign accounts set-up under your name and email) you can skip steps A thru D below as Forms Logic will automatically be the default account.*
- *If you **do** have other Docusign accounts under your name and email, note you can only use this specific Forms Logic docusign account to sign paperwork under WWA, so **please be sure to set your new Forms Logic account as the default using the below steps A thru D.***

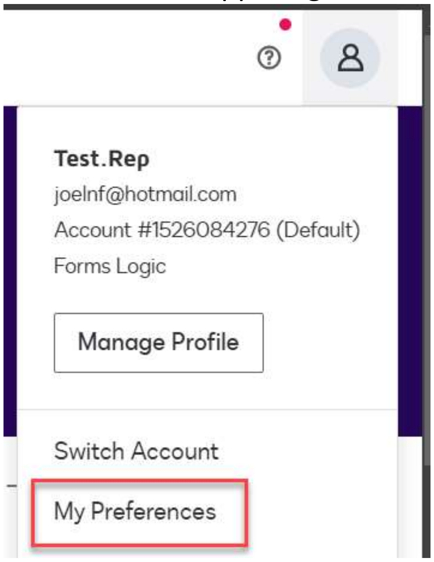
a. Select your name or icon in the upper right corner and select **Switch Account**



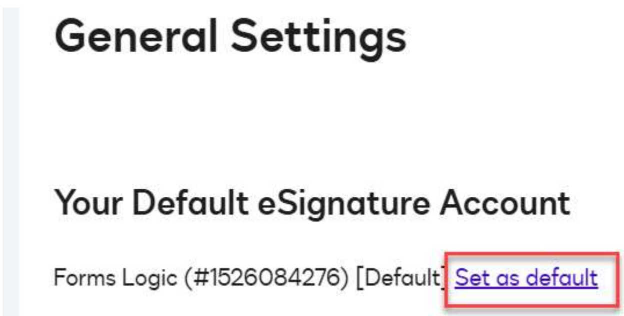
b. On the next screen select Forms Logic and **Confirm**



c. Return back to the upper right corner and select **My Preferences**



d. Set Forms Logic as the default and **Confirm**



e. You are now setup to use Forms Logic DocuSign

Step 2: Create Digital Handshake

- The first time you use Forms Logic with DocuSign, you must create the 'digital handshake' that allows all future e-signs between the two systems be automatic.

1. Inside the Forms Logic website, create a new **test workflow** to be sent via e-sign. To do this:

a. When logged into Forms Logic, click "Account Maintenance" from the home page. *(Another option is to click "workflow templates" on the left side menu and "New Form Workflow Wizard" and click "Maintenance" button. Both options bring you to the same place)*

b. Click "New Client" button

c. Click "Advisory Fee" button

d. Complete all fields from Account Category through Activity type on this screen **using your own name and email address matching the name and email on file with your Forms Logic account, and your personal cell phone number where you receive texts.**

e. Select something simple like an Address Change to make the test as easy as possible. Complete the page matching the screenshot example below **making sure your own personal info goes into the highlighted fields**.

f. Click "Submit"

New Client → Advisory (fee) → Rep. Code/State

Enter Client Information

Account Category:

Most Common

Account Type: *(required)*

- (●) Individual
- ( ) Joint Tenants WROS (With Rights of Survivorship)
- ( ) Rollover IRA
- ( ) Roth IRA
- ( ) Traditional IRA

Process As:

Custodian

Transaction Type:

Address Change

Transaction Amount:

$0.00

Process In State:

--Select--

Need to select an entry.

Relationship Type:

Advisory (Fee)

Relationship Type:

Advisory (Fee)

Client Type:

Individual

First Name: *(required)*

This field is not optional.

Middle Name:

Last Name: *(required)*

This field is not optional.

Suffix:

Primary Email:

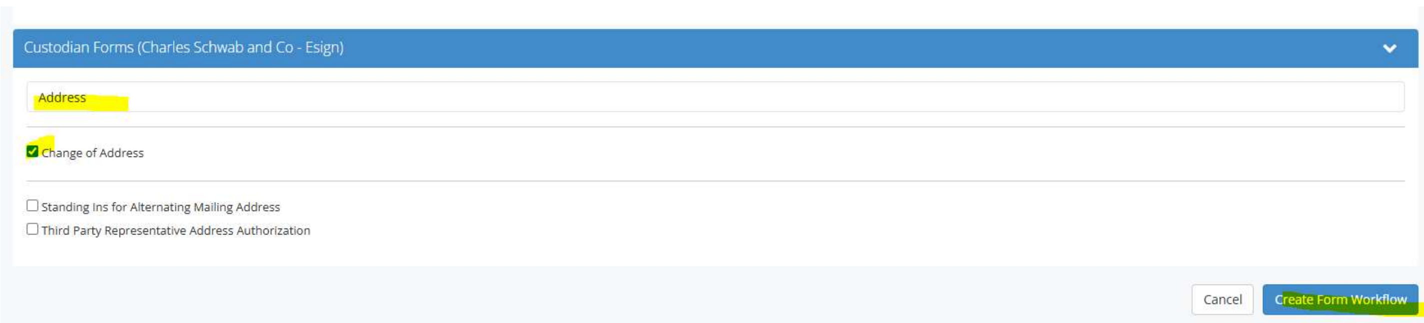
Email Type:

Work

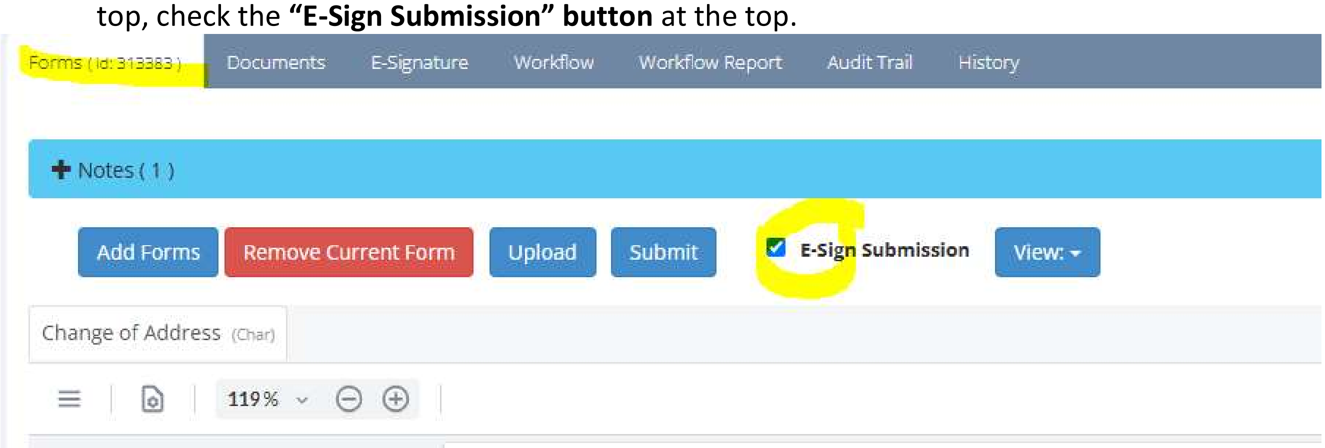
Primary Phone Number: *(required)*

This field is not optional.

a. Go under the "Custodian Forms" section and search the word "Address".
b. Click "Change of Address" from the search results list:
c. Click "Create Form Workflow"



2. You just created your first test workflow. While viewing this workflow from the "Forms" tab across the top, check the **"E-Sign Submission" button** at the top.



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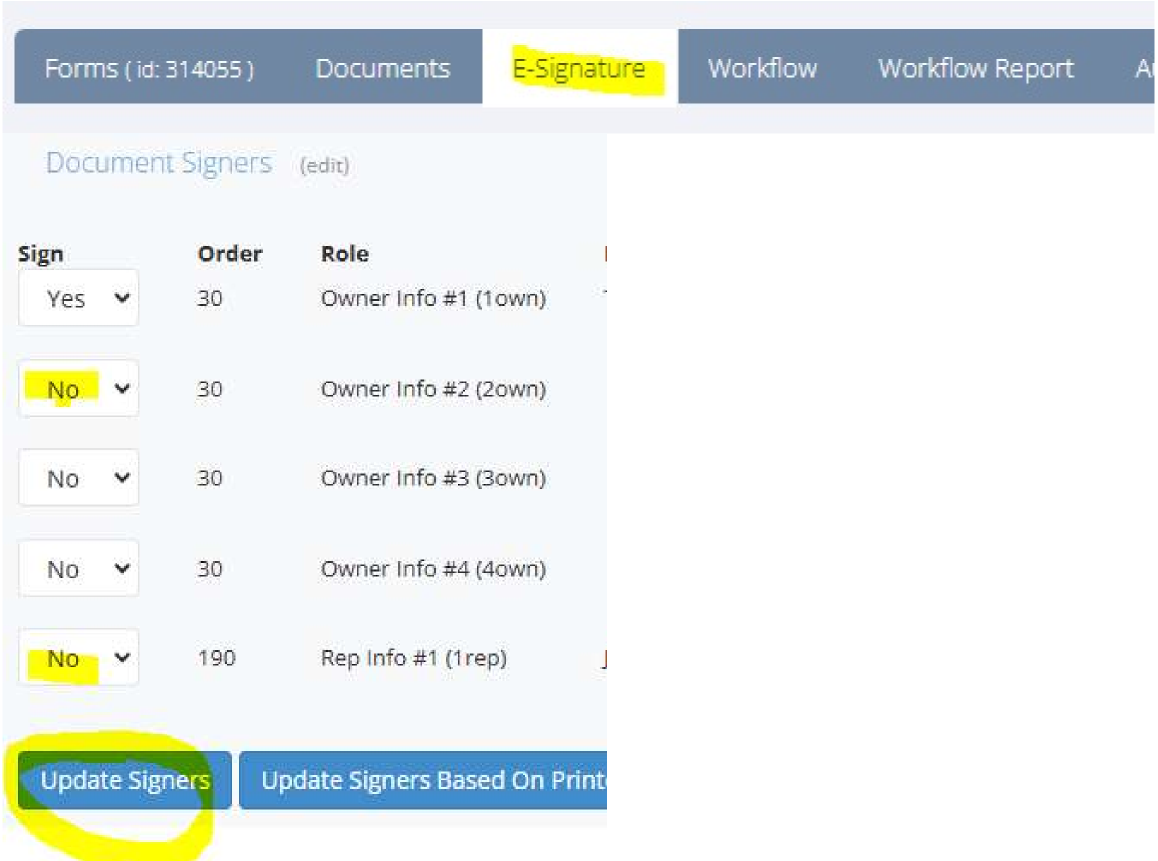
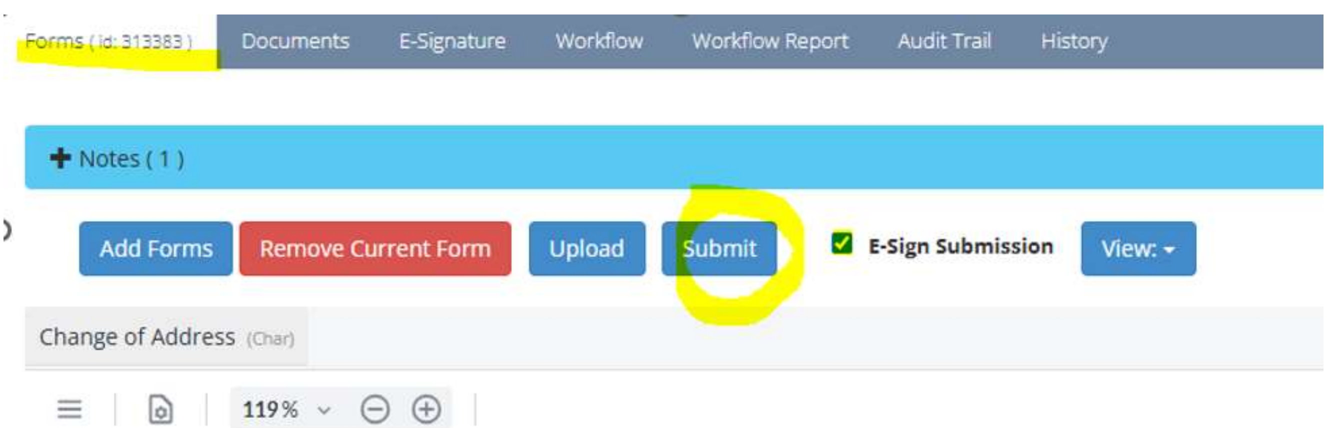
3. Click on the tab across the top that says "**E-Signature**". From this screen, in the Docusign Signers section, change the second and last drop downs to "No" Leave the first row as "Yes". Be sure to cluck "Update Signers". Final result should appear this way (with your name as owner #1):



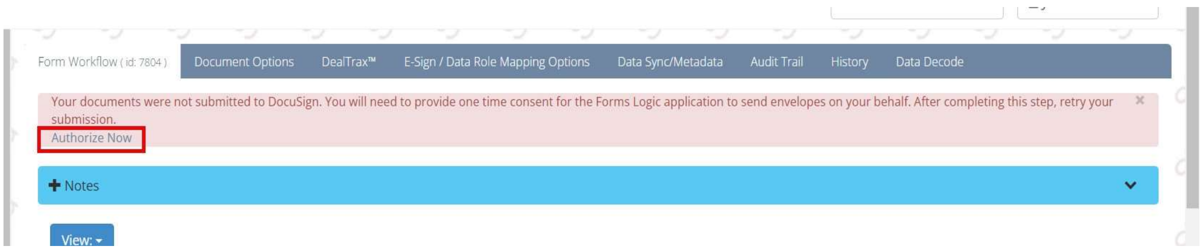
4. Toggle back to the "Forms" tab at the top of the screen. Click the "**Submit**" button (making sure that E-Sign Submission is still checked).



5. The page will then switch over to the "Form Workflow" list showing the workflow you just created. Click the workflow ID link in the left column to go back into the Workflow.

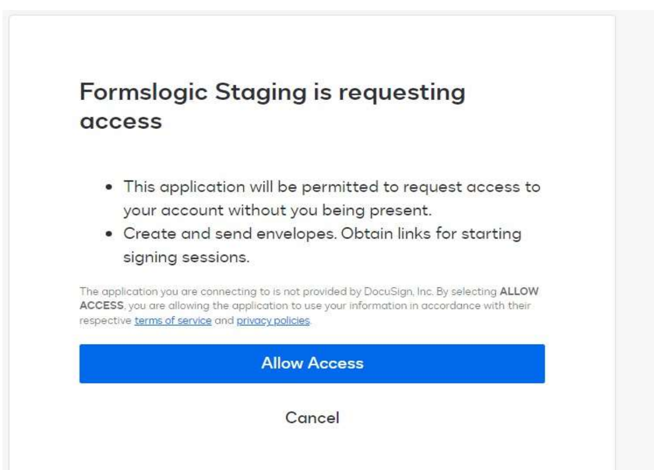
6. Click the "**E-Signature**" tab across the top of the page. Then click "**Send for Electronic Signature".**

7. The first time only, you should get this message below. Click the "**Authorize Now**" link.



8. You will be redirected to DocuSign and will need to login.

9. Once identified, click **Allow Access** with Forms Logic.



10. This will complete the integration and you will redirected back to the main screen. Note: This first time will NOT send the envelope.

11. Return to the workflow again inside Forms Logic. Go to the e-signature tab across the top, and select Send for Electronic Signature. In approximately 30 seconds the esign will complete and the screen will close.

12. On your next e-Sign you will not need to do any of these steps other than select Send for Electronic signature.