# 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

- 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

Test.Rep		
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400001 #1526084	276 (De	erault)
-orms Logic		
Manage Profile		
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Manage Profile	•	

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	
<ul> <li>Joint Tenants WROS (With Rights of Survivorship)</li> </ul>	
O Rollover IRA	
Roth IRA     Traditional IPA	
Process As:	
Custodian	~
Transaction Type:	
Address Change	~
Transaction Amount:	
\$0.00	
20.00	
Process in State:	
Select	~
• Need to select an entry.	
Relationship Type:	
Advisory (Fee)	~
Relationship Type:	
Advisory (Fee)	~
Client Type:	
Individual	~
First Name: (required)	
9 This field is not optional.	
Middle Name:	
Last Name: (required)	
This field is not optional.	
Suffix:	
Primary Email:	
Email Type:	
Work	~
Primary Phone Number (counced)	
romary mone number: (requireu)	

9 This field is not optional.

#### Phone Type:

Mobile or Cell	~
Rep Code:	
12345 - Casey Ryder,	Ÿ
Activity Type:	
New Client - Maintenance	×
	Submit

- 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"

Custodian Forms (Charles Schwab and Co - Esign)	×
Address	
Change of Address	
□ Standing Ins for Alternating Mailing Address	
Third Party Representative Address Authorization	
	Cancel 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.

Notes ( 1 ) Add Forms Remove Curre	ent Form Upload	t Culturit			
Add Forms Remove Curre	ent Form Upload	d Cubmit			
Add Forms Remove Curre	ent Form Upload				
		Submit	E-Sigi	n Submission	View: -
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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):

Forms (id	: 314055 )	Documents	E-Signature	Workflow	Workflow Report	A
Docume	nt Signers	(edit)				
Sign	Order	Role				
Yes 🗸	30	Owner Info #1 (	1own)			
No 🗸	30	Owner Info #2 (	2own)			
No 🗸	30	Owner Info #3 (	3own)			
No 🗸	30	Owner Info #4 (	4own)			
No 👻	190	Rep Info #1 (1re	:p) J			
Update Si	gners Up	odate Signers Base	ed On Print			

**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).

Forms (id: 313383 )	Documents	E-Signature	Workflow	Workflow Repo	ort Audit Trail	History	
+ Notes ( 1 )							
Add Form	s Remove Cu	urrent Form	Upload	Submit	E-Sign Submiss	ion View: -	
Change of Addr	ess (Char)						
	119% ~ (	∋⊕					

**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.

313383	Casey Ryder	Individual	Charles Schwab and Co - Esign	Adv	Address Change		

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.

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orm Workflow ( id: 7804 )	Document Options											
Your documents were r	not submitted to Docus	ian You will noo	d to provido opo t	time consent for the	Forms Logic applic	ation to cor	nd anvalan	os on vour b	obalf After con	oplating th	is stop, rotry	VOUR X
submission.	for submitted to Docus	ngin. Tou wiir nee	a to provide one	time consent for the	Forms Logic applic	ation to ser	id envelop	es on your b	enan. Aiter con	inpleting th	is step, reay	your
Authorize Now												
+ Notes												~
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- 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.
- 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.