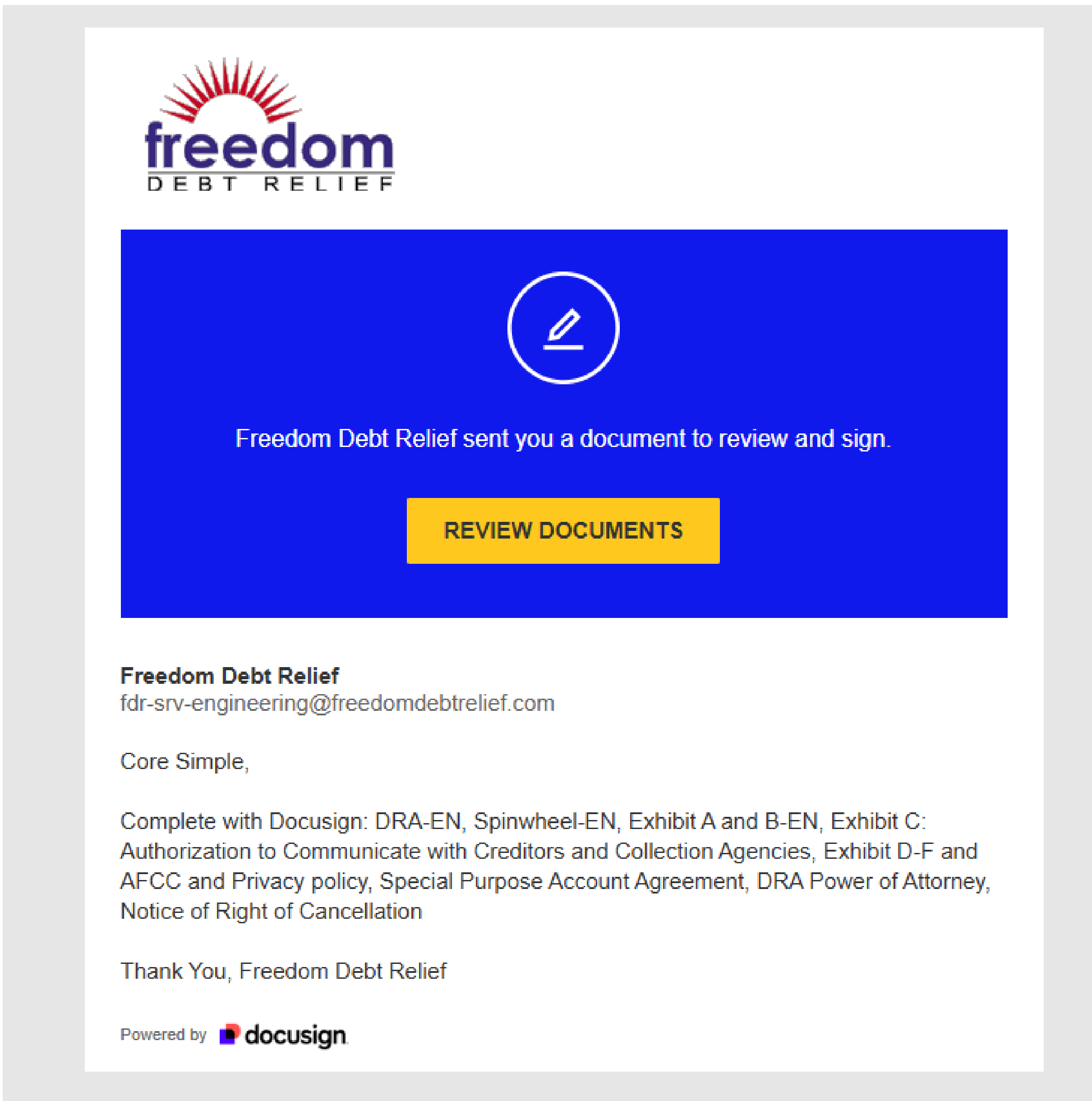
DocuSign Client Walkthrough

To send the DRA to the client, select the “Generate Agreement” button in Salesforce

The client will receive an email from “Freedom Debt Relief via DocuSign” and will contain the subject “Contract Signing Request” with the following content:

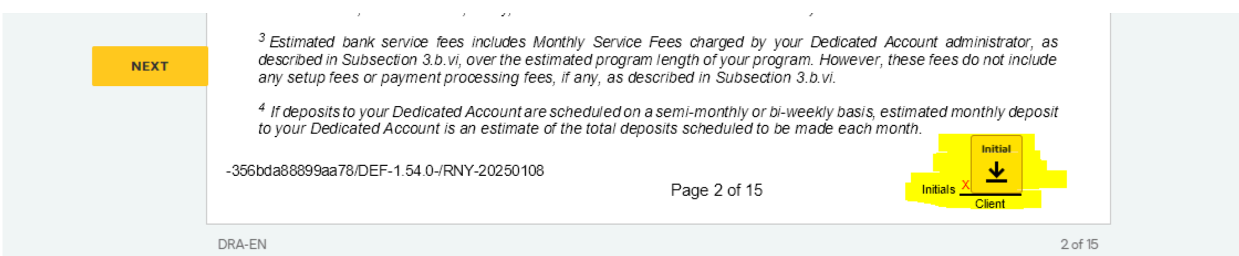


DocuSign Client Walkthrough

The client will select the **"Review Documents"** button - this will open a new tab in the clients browser

Direct the client to select the yellow **"Start"** button at the top of the page

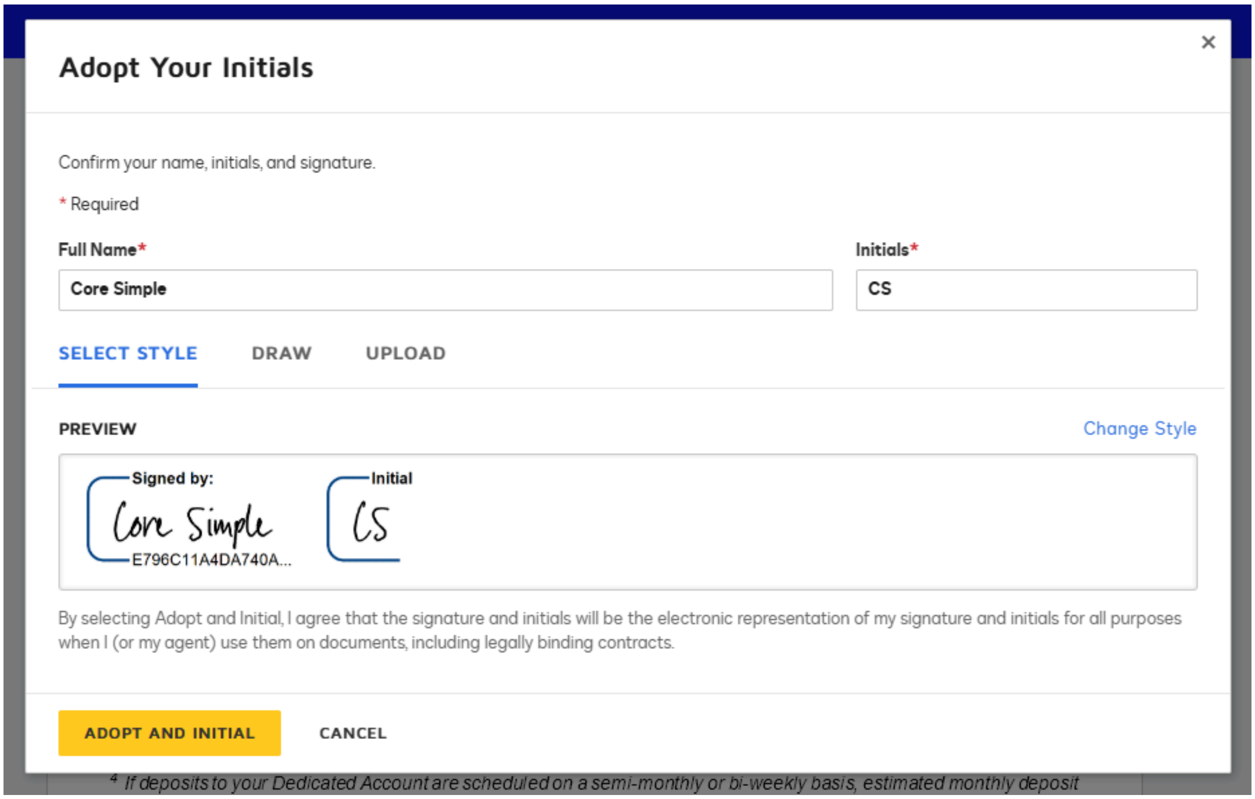
The client will automatically be brought to the first initial request - have them select the yellow initial box with the black arrow in it



DocuSign Client Walkthrough

If the client has never used DocuSign, they will be promoted to Adopt Your Initials by clicking the yellow **"Adopt and Initial"** box at the bottom

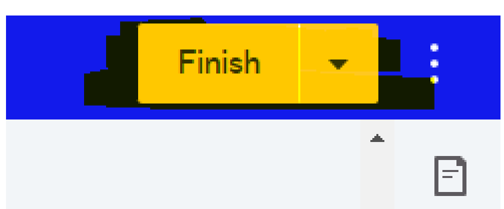
(we recommend that the client uses the pre-populated signature and initials to avoid any issues with them drawing their own)



The client will then automatically be taken to the next set of initials and signatures, they will continue selecting the yellow boxes with black arrows

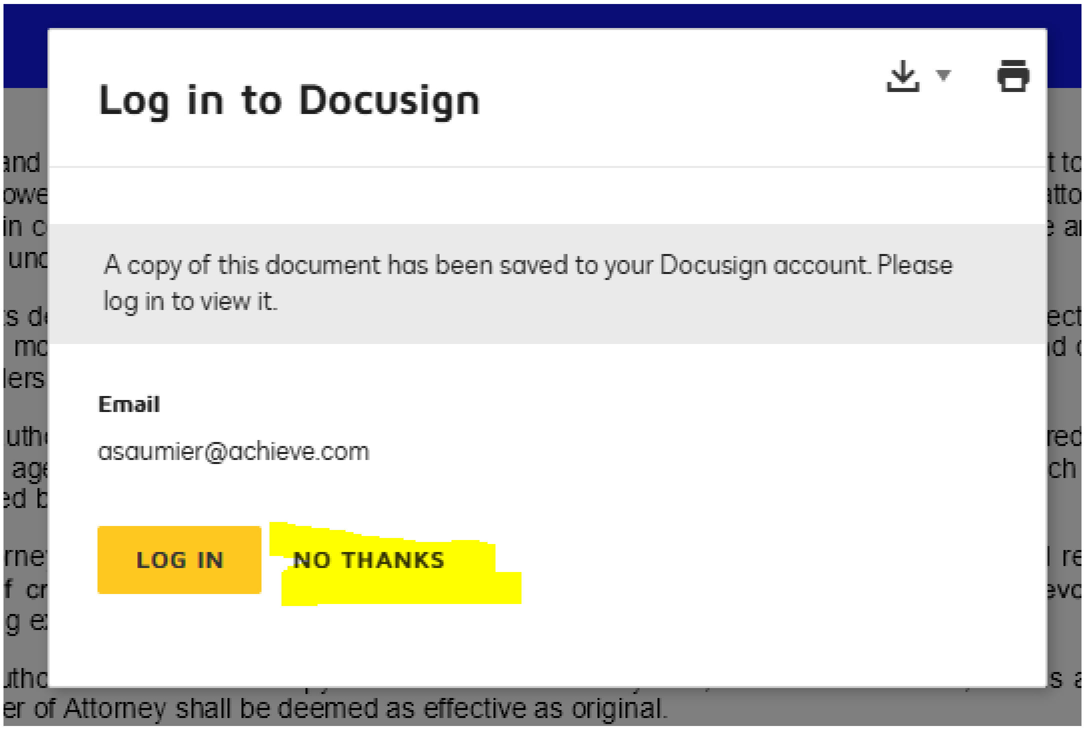
Once all of the boxes are completed, the **"Finish"** button will turn yellow for the client

*Note: if the client manages to miss a signature or initial, the system will automatically bring them back to the missed box before they will be able to select "Finish"



DocuSign Client Walkthrough

The client may receive a pop-up prompt to create/log-in to a DocuSign account - they can select **"No Thanks"** - they are sent a copy of the DRA regardless of having an account



The client should then see a confirmation message that their document has been successfully signed

The client will be sent a confirmation email along with a PDF copy of the DRA to be saved for their records if they choose, you can then refresh SF for the DRA to come back from DocuSign :)