

DocuSign Client Walkthrough

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

Generate Agreement

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



Freedom Debt Relief sent you a document to review and sign.

REVIEW DOCUMENTS

Freedom Debt Relief

fdr-srv-engineering@freedomdebtrelief.com

Core Simple,

Complete with Docusign: DRA-EN, Spinwheel-EN, Exhibit A and B-EN, Exhibit C: Authorization to Communicate with Creditors and Collection Agencies, Exhibit D-F and AFCC and Privacy policy, Special Purpose Account Agreement, DRA Power of Attorney, Notice of Right of Cancellation

Thank You, Freedom Debt Relief

Powered by  **docusign**

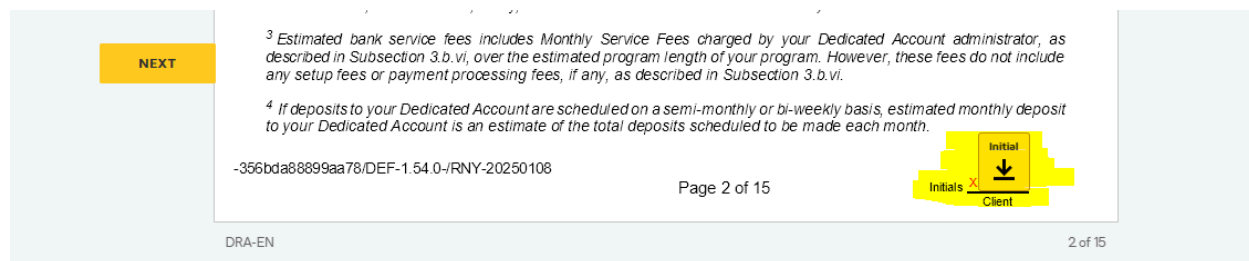
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The client will select the “**Review Documents**” button – this will open a new tab in the clients browser

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



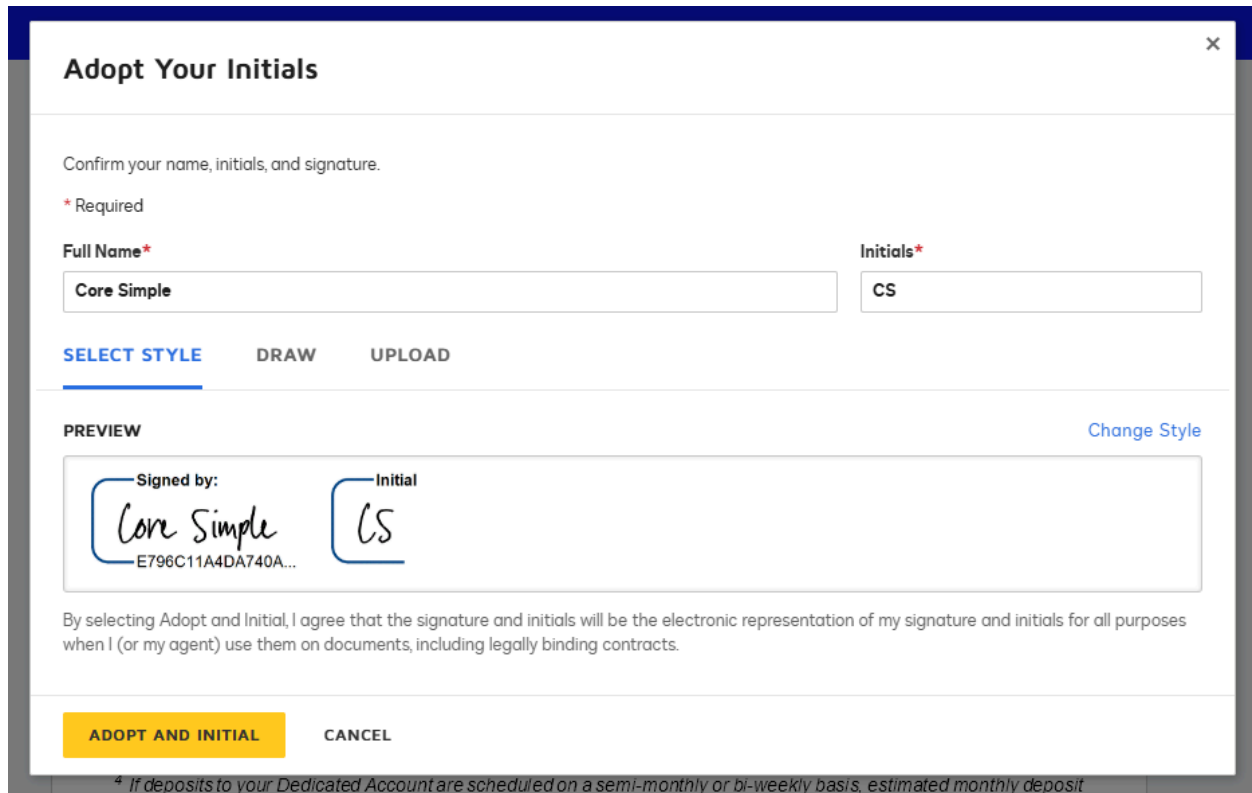
The client will automatically be brought to the first initial request – have them select the yellow initial box with the black arrow in it



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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)

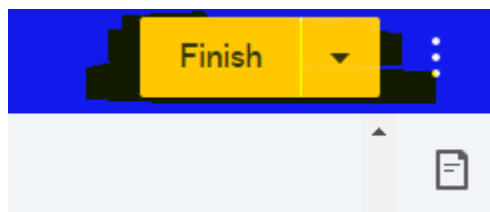


The screenshot shows the 'Adopt Your Initials' window in DocuSign. At the top, it says 'Confirm your name, initials, and signature.' Below this, there are two input fields: 'Full Name*' with the value 'Core Simple' and 'Initials*' with the value 'CS'. There are three tabs: 'SELECT STYLE' (which is selected), 'DRAW', and 'UPLOAD'. Below the tabs is a 'PREVIEW' section showing a signature 'Core Simple' and initials 'CS'. Below the preview, there is a disclaimer: 'By selecting Adopt and Initial, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.' At the bottom, there are two buttons: 'ADOPT AND INITIAL' (highlighted in yellow) and 'CANCEL'. A small footnote at the very bottom reads: '* If deposits to your Dedicated Account are scheduled on a semi-monthly or bi-weekly basis, estimated monthly deposit'.

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

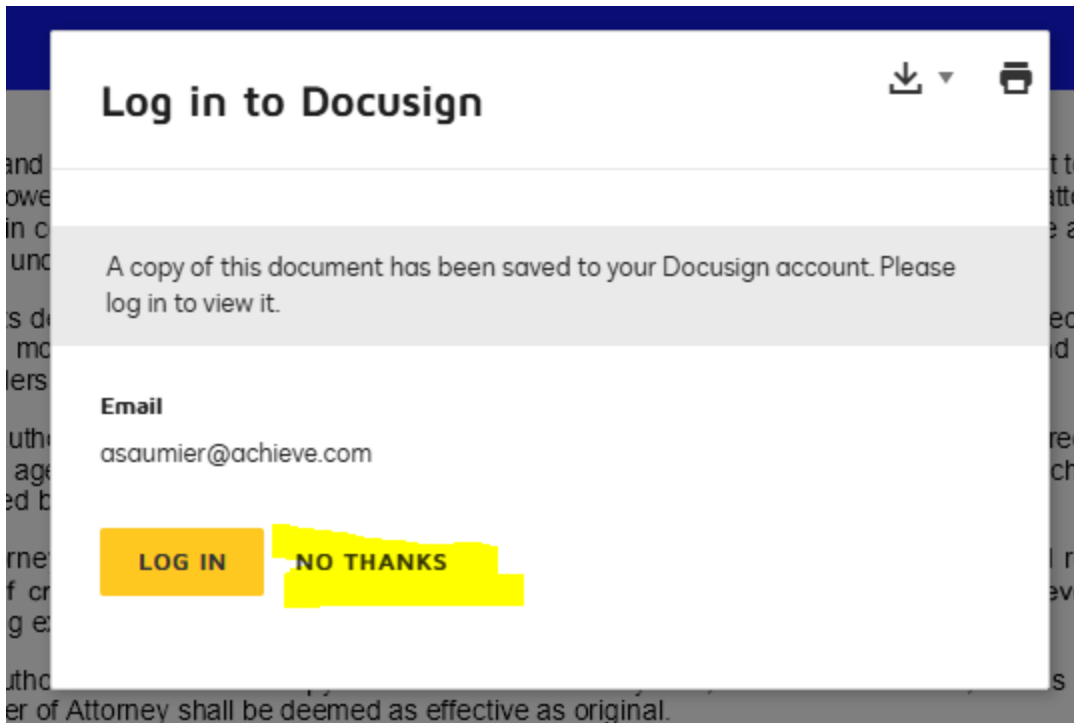
Once all of the boxes are completed, the **“Finish”** button will turn yellow for the client

*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”

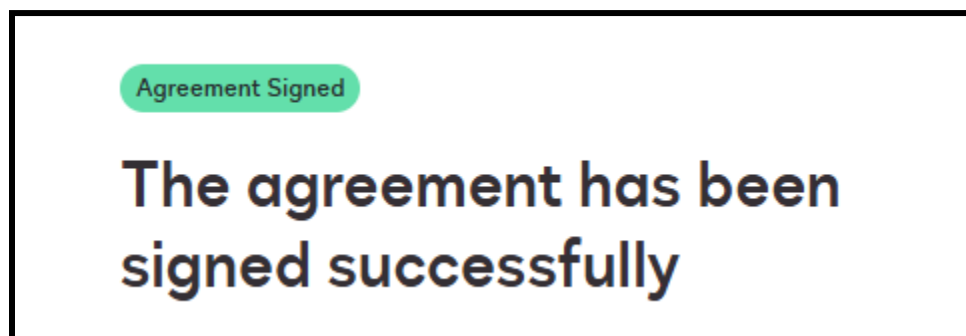


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The client may receive a pop-up prompt to create/log-in to a DocuSign account – they can select **“No Thanks”** – they are sent a copy of the DRA regardless of having an account

A screenshot of a DocuSign login pop-up window. The window has a dark blue header with the text "Log in to Docusign" and icons for download and print. Below the header, a grey box contains the text: "A copy of this document has been saved to your Docusign account. Please log in to view it." Underneath, there is a label "Email" and the email address "asaumier@achieve.com". At the bottom, there are two buttons: an orange "LOG IN" button and a yellow "NO THANKS" button. The background of the pop-up shows a document with text, including "er of Attorney shall be deemed as effective as original."

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 :)