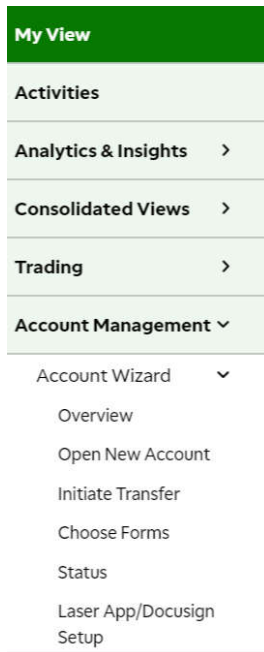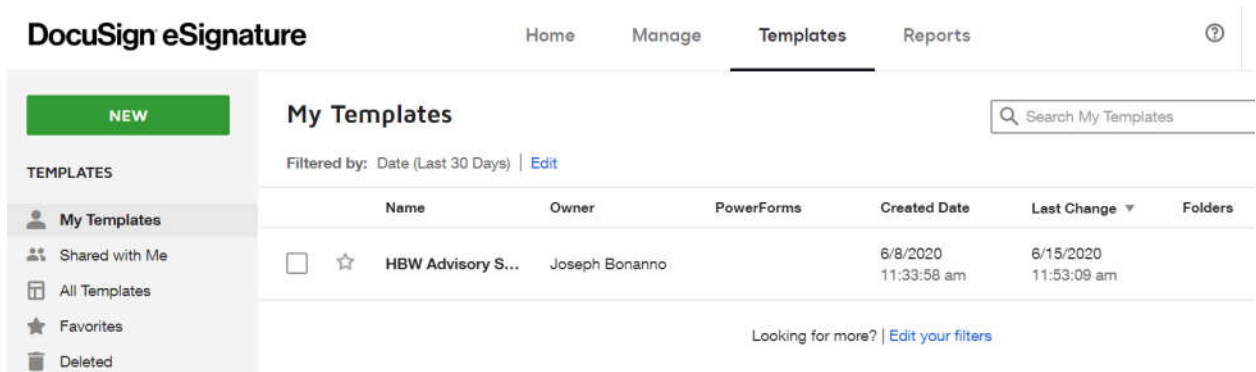# Docusign: A Crash Course (4 pages)

1. Get signed up. You just need to use the email address on file with TD Ameritrade. From within VeoOne, just go to the left side menu and drill down to Laser App/Docusign setup.

2. Get the HBW Template Files: https://hbwadvisory.com/wp-content/uploads/DocuSignTemplates_V7.zip That's a zip file. Just unzip to find the json file that you upload to Docusign.

3. Uploading to Docusign: This is done on the "Templates" tab. You hit the "NEW" button and then select upload to upload the template.

4. Check your User Settings under My Preferences

Under Template Matching make sure the box that says "Match Templates to Uploaded Files" is un-checked. When using the templates you want to **always Apply rather than Match a template**.

General Tips

1. To ensure the right distribution list on the signature chain you should always import the HBW Template, even if you don't keep it for completing your forms. The same is true for the TD Ameritrade forms. If you pre-fill your forms but don't Apply a Template that matches the form you may not have the right distribution list or signee authentication levels.

   After creating the new envelope you will see a box like below. Click "Use Template" and then under "My Templates" select the HBW Template. (In the picture below I've already added the HBW new account bundle).
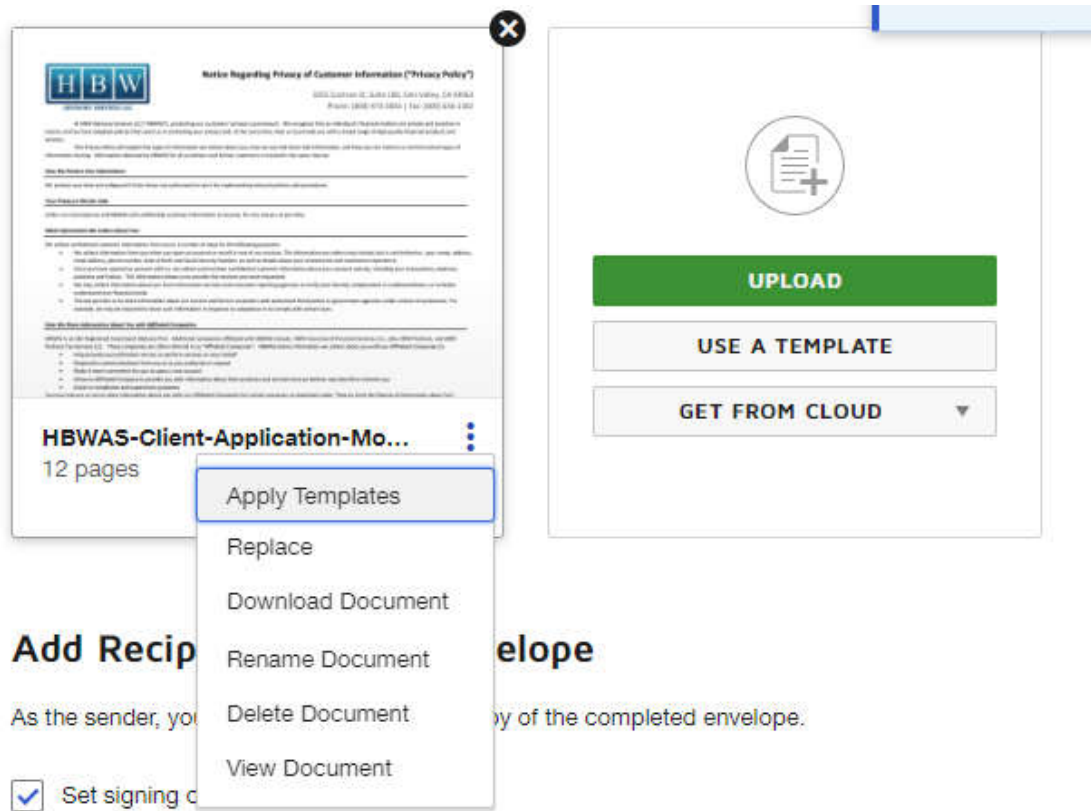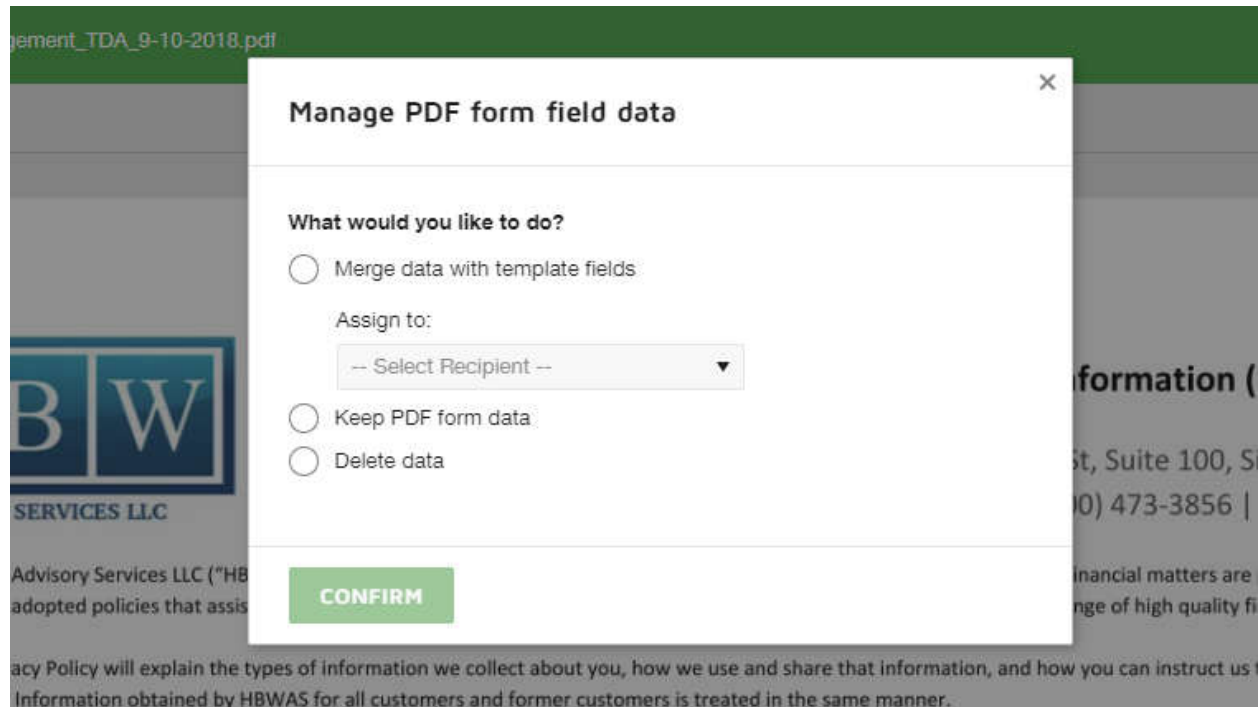
If you are not prompted by the system you can Apply a Template by finding the menu
embedded in the Document Thumbnail:

2. The TD Ameritrade forms are under "All Templates." The LA tagged templates are for
   Laser App.

3. If you get all of the above correct you should see a distribution list that follows the
   following format:
   i. Client – Knowledge Based Authentication
   ii. Joint– Knowledge Based Authentication (if applicable)
   iii. Advisor – Access Code Based Authentication (you)
   iv. Compliance– Access Code Based Authentication (todd.penrod)
   v. Back Office – Access Code Based Authentication (todd.penrod)
   vi. TD – Access Code Based Authentication (ztdae-sig@tdameritrade.com)

   Note: knowledge based authentication can be a challenge, so although it is the
   default method you probably want to enter the client's cell phone number as
   switch the method to SMS whenever possible.

4. If you are pre-filing applications before uploading them to Docusign at some point you
   will be asked if you wish to Merge Data, Keep Data or Delete data. There are pros and
   cons to the first two.

Manage PDF form field data   ✕

What would you like to do?

○ Merge data with template fields

    Assign to:

    -- Select Recipient --   ▼

○ Keep PDF form data

○ Delete data

CONFIRM

i. Keeping form data will usually mean that any missing data will require form fields to be added back to the templates. And any fields that the client would wish to correct will not be editable.

ii. Merging form data often means you are looking at duplicate form field in which case you will want to remove the duplicate (often empty) fields from the forms. Merging will force you to assign all fields to a single signor. That means all the other fields will need to be manually assigned to the correct signor. The only good news here is that you can reassign multiple fields at once when editing the forms. **I find it easiest to Merge and assign fields to the primary client.**

iii. I've never used "Delete data" and don't imagine too many use cases.

5. The Preview function has a known bug. So don't panic if after all your work that the form fields all appear blank. The client will most likely see the product of all your hard work.