



## Two eSigners with the Same Email Address

Let our independence ignite yours.™

The following provides the steps to obtain multiple electronic signatures from different clients sharing the same email address.

Complete all client documents and satisfy all validations. Be sure to save all form data. Click on Actions- eSign.

← → ↻ 🔒 preprod.docupaceinc.com/pcsbd\_ui#/domain/21004/show/583537?launchedFrom=NobwRADghgtgpmA

PRIVATE CLIENT SERVICES All by Name Client Search 🔍

Monitor / Work Item #96636

Pending Advisor Review ⚙️ Actions ➔ Reassign 📁 Work Item Client Documents

📎 Attach 📄 eSign 🖨️ Wet Sign 📄 Merge 📄 Archive 🔄 Re-Process

📄 Barcode 📄 WI Notes 👤 Get Jcore Data

Client Work Item

Client Account

Work Item ID	Request Type	Account #	Client Folder Group	Client Folder Last Name	Client Folder First Name	Client Folder Company Name	Client Folder SSN Masked	Client Folder Rep Code	Advisor Last Name
96636	New Account		CLIENT HOUSEHOLD	CLIENT	PRIMARY		XXXXX9999		
				CLIENT	TESTER		XXXXX9874	BD123	REP

Work Item Client Documents ➕ Add 📄 Barcode 📄 Combine & Print 🔄 Merge 📄 eSign 📄 Create WI

Subfolder

<input type="checkbox"/>	Document Type	Form Name	Account #	Client Folder Group	Client Folder Last Name	Client Folder First Name	Client Folder Company Name	Client Folder SSN Masked
<input type="checkbox"/>	Account Maintenance	FORM CRS		CLIENT HOUSEHOLD	CLIENT	PRIMARY		XXXXX9999 XXXXX9874
<input type="checkbox"/>	Account Maintenance	RECOMMENDATION DOCUMENTATION SUPPLEMENT		CLIENT HOUSEHOLD	CLIENT	PRIMARY		XXXXX9999 XXXXX9874
<input type="checkbox"/>	Account Maintenance	BROKERAGE ACCOUNT ADDENDUM		CLIENT HOUSEHOLD	CLIENT	PRIMARY		XXXXX9999 XXXXX9874
<input type="checkbox"/>	Form	CUSTOMER ACCOUNT FORM		CLIENT HOUSEHOLD	CLIENT	PRIMARY		XXXXX9999 XXXXX9874

Showing 1 to 4 Previous Next

On the eSign details page, verify information for all signers by clicking on each signer in the eSign Recipient box.

eSign Recipient <span style="float: right;">Remove</span>								
<input type="checkbox"/>	Signer Type	First Name	Last Name	Email	Sign Mode	eSign Status	Signer Auth Mode	Order Index
<input type="checkbox"/>	Advisor 1	BD	REP	rarmock@pcsb.net	eSign - Remote	Draft	SMS	9
<input type="checkbox"/>	Primary Signer	PRIMARY	CLIENT	primary.client@gmail.com	eSign - Remote	Draft	SMS	
<input type="checkbox"/>	Secondary Signer	TESTER	CLIENT	docupace-test@pcsb.net	eSign - Remote	Draft	SMS	

Showing 1 to 3 Previous Next

Review the email address and mobile phone number for SMS verification. Sign mode defaults to eSign – Remote.

**Details**

First Name	PRIMARY	Last Name	CLIENT
Middle Name		Date Of Birth	01/01/1960
TIN/SSN	777889999	Email	docupace-test@pcsb.net
Signer Type *	Primary Signer	Sign Mode *	eSign - Remote
Signer Auth Mode	SMS	Phone for Authentication	9202056505
Address	987 APPLE DR	City	ANYTOWN
State	IA	Zip Code	51025
Order Index		eSign Status	Draft
eSign Date/Time	May 4, 2021 8:31:05 AM	eSign Status Notes	
IP Address			

Click Save and Close after making any changes to the details.

Next >

Once all information has been verified for all signers, in the Details section, click on the eSign Transaction Action dropdown and select Open Transaction Interface.

**Details**

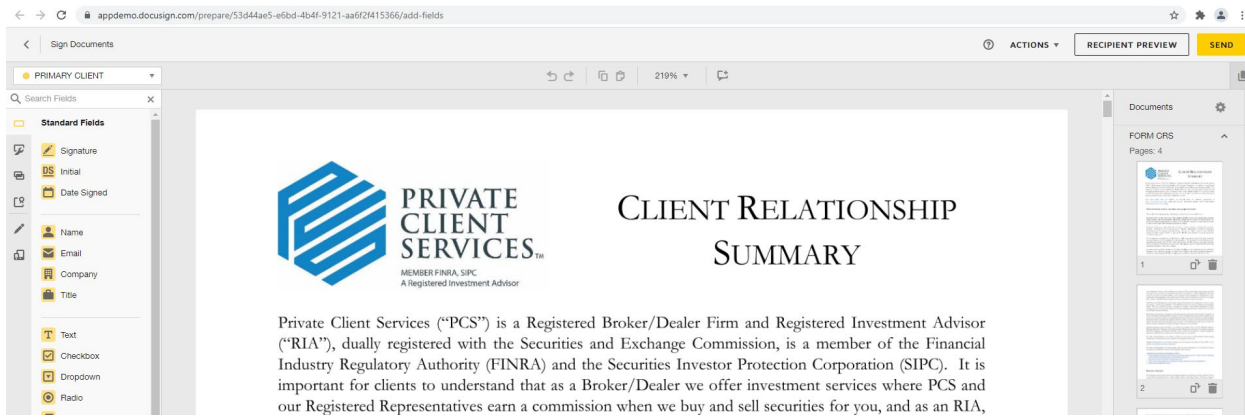
eSign Status *	Draft	eSign Date/Time	
eSign Transaction Action	eSign Transaction Action		

1 Open Transaction Interface  
X Void Transaction

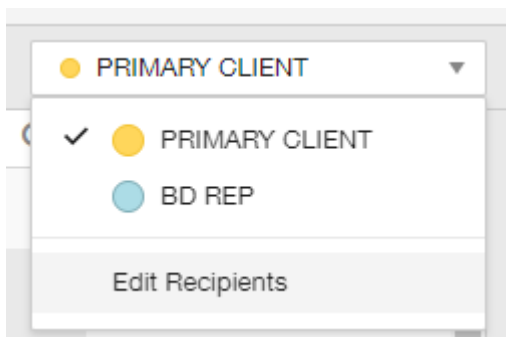
Click on eSign in the upper right corner.

Next >

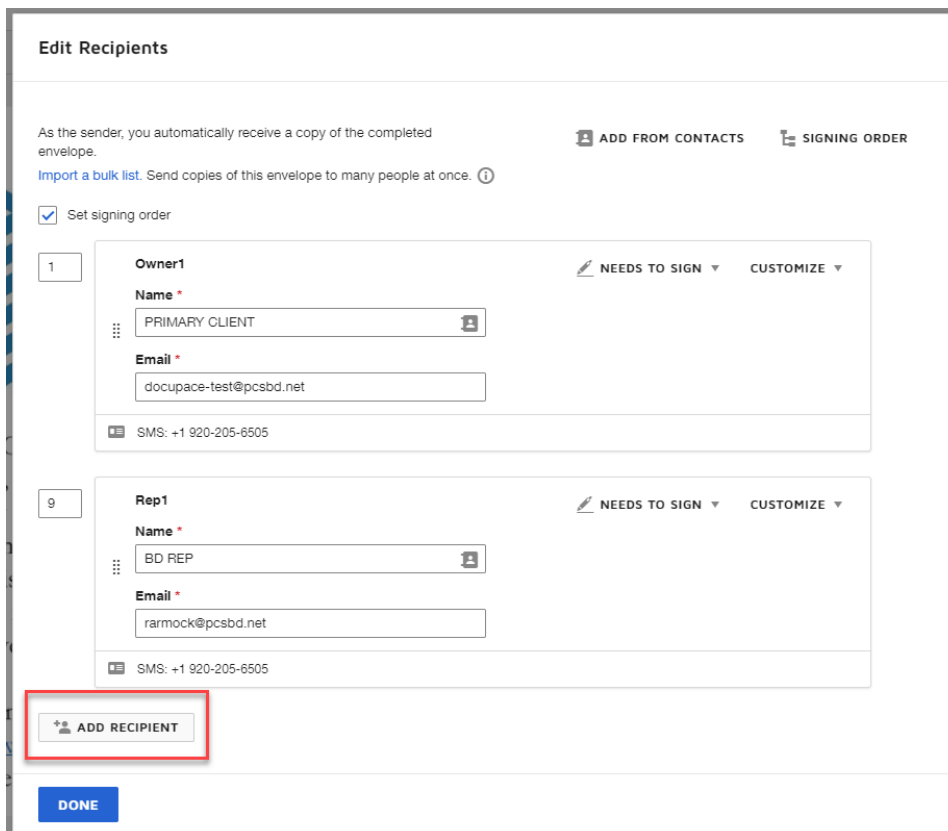
This will launch DocuSign in a new tab.



Click on the recipients dropdown in the upper left corner and select Edit Recipients. You will notice that the second signer is not in the dropdown list.



In the pop up box, click Add Recipient.



Add the additional signer(s) names and email addresses and be sure to set the signing order number on the left. The default when adding a recipient is after the rep signature and this must be changed to a number lower than the rep's which is set at 9.

A screenshot of a recipient form. On the left, a small box contains the number '10', which is highlighted with a red rectangular border. The form itself has a 'Name \*' field containing 'Secondary Client' and an 'Email \*' field containing 'docupace-test@pcsbd.net'. To the right of the form are two dropdown menus: 'NEEDS TO SIGN' and 'CUSTOMIZE'.

Click the Customize dropdown and select Add identity verification.

A screenshot showing the 'CUSTOMIZE' dropdown menu open. The menu has three options: 'Add access code' (with a key icon), 'Add identity verification' (with a document icon and highlighted), and 'Add private message' (with a speech bubble icon). The 'Add identity verification' option is selected. The background shows the recipient form with the number '2' in a box on the left and the number '9' in a box below it.

Select SMS in the Identity Verification dropdown.

A screenshot showing the 'Identity Verification' dropdown menu open. The menu has three options: 'Knowledge-based' (with a dropdown arrow), 'SMS' (with a checkmark and highlighted), and 'Knowledge-based' (with a checkmark). The 'SMS' option is selected. The background shows the recipient form with the number '2' in a box on the left and the number '9' in a box below it.

Enter the client mobile phone number and click Close.

A screenshot of the 'Identity Verification' dialog. The 'SMS' option is selected in the dropdown menu. Below the dropdown, there is a text field for the mobile number. The number '+1 9202056505' is entered in the field. The dialog has 'Close' and 'Discard' buttons in the top right corner.

Review the signing order to ensure the rep is listed last and all signer information is correct. Click Done.

**Edit Recipients**

Set signing order

1 **Owner1** ✍️ NEEDS TO SIGN ▾ ⚙️ CUSTOMIZE ▾

**Name \***  
PRIMARY CLIENT

**Email \***  
docupace-test@pcsbd.net

SMS: +1 920-205-6505

2 **Name \*** ✍️ NEEDS TO SIGN ▾ ⚙️ CUSTOMIZE ▾

Secondary Client

**Email \***  
docupace-test@pcsbd.net

SMS: +1 920-205-6505

9 **Rep1** ✍️ NEEDS TO SIGN ▾ ⚙️ CUSTOMIZE ▾

**Name \***  
BD REP

**Email \***  
rarmock@pcsbd.net

SMS: +1 920-205-6505

ADD RECIPIENT

**DONE**

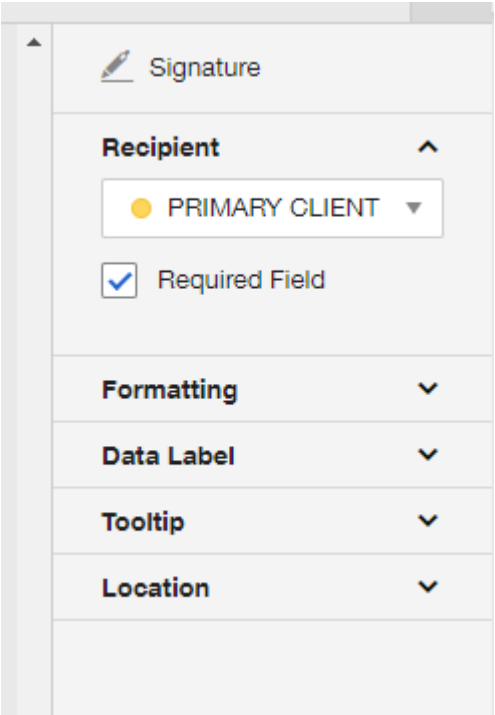
On the document screen in DocuSign, you will now assign the clients to the appropriate signature spots on the forms. Go to the first signature field on the document and click the Sign box.

Primary Account Owner Signature Date

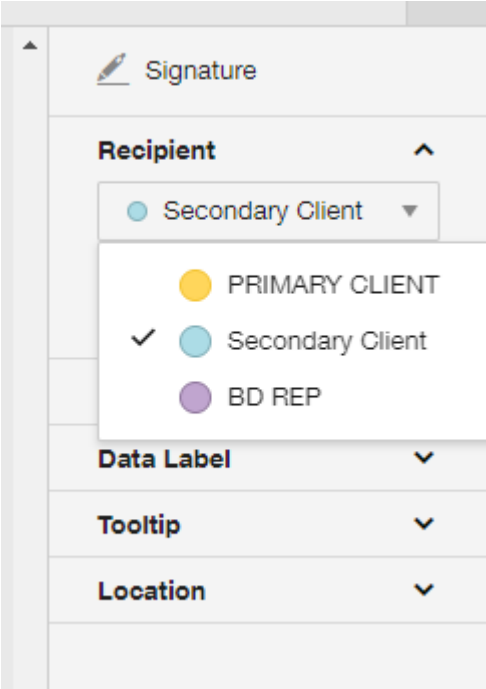
**Sign**

**Date Signed**

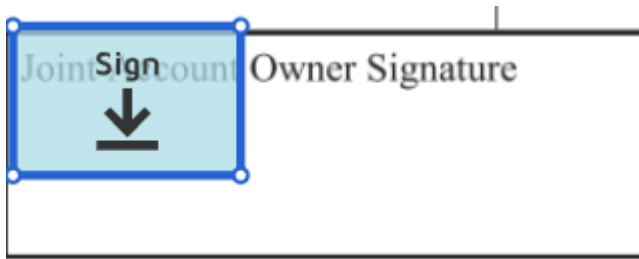
On the right of the screen, you will see who the field is assigned to.



To change the signer, click the Recipient dropdown and select the correct signer.



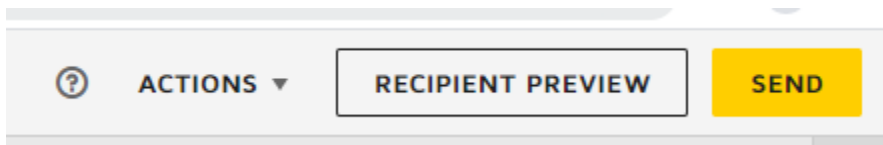
The Sign box will change to the color of the correct signer.



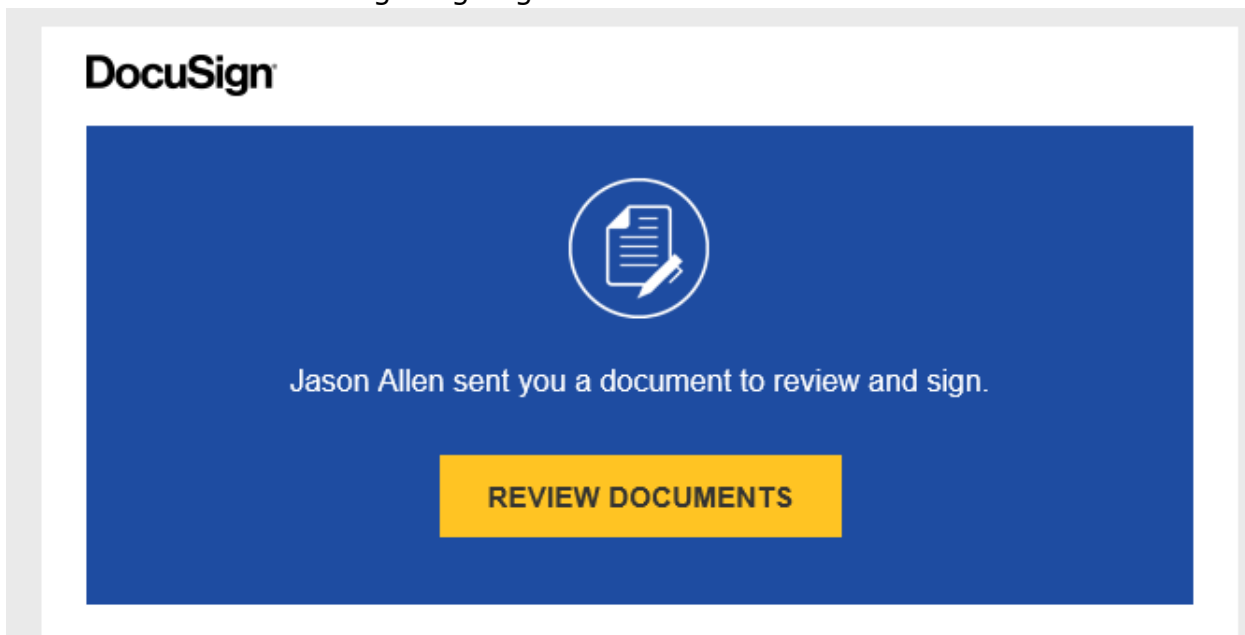
Continue the process with all the signature and date fields.

Primary Account Owner Signature <b>Sign</b> ↓	Date <b>Date Signed</b>	Joint Account Owner Signature <b>Sign</b> ↓	Date <b>Date Signed</b>
Representative Name <b>BD REP</b>	RR# <b>BD123</b>	Representative Signature <b>Sign</b> ↓	Date <b>Date Signed</b>
OSJ Manager Name	OSJ Manager Signature	Date	

Once all signers have been assigned to the appropriate signature fields, click Send to send the documents to the first signer.




The first client will receive the DocuSign email at the email address indicated. Click on Review Documents to begin signing.



The client should verify that their name displays and confirm their mobile number. Click Send SMS.

## Security Requests from Sender

 **Jason Allen**  
Docupace - Private Client Services

### SMS Authentication

In order to access this document, you need to confirm your identity using your mobile phone.

1. Choose a phone number below and select the "Send SMS" button to receive a text message.
2. Enter the access code on the following page.

Authenticating Signer Name: **PRIMARY CLIENT**


Please select a phone that can receive text messages so you can authenticate:

+1 920-205-6505

If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

Enter the authentication code received via text and click Confirm Code.

## Security Requests from Sender

 **Jason Allen**  
Docupace - Private Client Services

### SMS Authentication

An SMS message has been sent to your mobile phone. You should receive it momentarily.

Enter the code you received in the SMS message in the field below and press Confirm Code.

If you do not receive an SMS message, select "Cancel", verify the mobile phone number and try sending the SMS message again.

The client will click to agree to using electronic signature. Then click Continue.

 Please read the Electronic Record and Signature Disclosure.

I agree to use electronic records and signatures.



Click Start.

DocuSign Envelope ID: 0D66397D-E462-4CFA-A970-11B3AF5018A2

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CLIENT RELATIONSHIP

START

The first signer should be taken to only the fields they need to sign. Click Sign.

advisory, non-qualified accounts and PGR (Pershing Government Account) for non-advisory qualified accounts. For all Advisory Accounts, the default is RFIM (Liquid Insured Deposits). For a list of additional available money market funds, please see RateBoard within NetX360.

Method:  C  C3\*  ACH\*  
Start Date (mm/dd/yyyy): \_\_\_\_\_

Required - Sign Here -

\* additional paperwork is required for methods above and retirement accounts

\* additional paperwork is required for methods above and retirement accounts

Primary Account Owner Signature	Date	Joint Account Owner Signature	Date
	5/4/2021		

SIGN

For the first signature, they will be asked to adopt a signature. They can choose the predefined style or draw their own. Then click Adopt and Sign.

or signature

### Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*  Initials\*

**SELECT STYLE**   DRAW   UPLOAD

PREVIEW Change Style

DocuSigned by:


*PRIMARY CLIENT*   *PC*

02F4425B34C3483...

By selecting Adopt and Sign, 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 - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN**   CANCEL

Continue through the document until all signatures are complete.



Market Sweep defaults and available products are subject to change.	
Primary Account Owner Signature	Date
	5/4/2021
Representative Name	RR#

Click Finish.



Clients can elect to save a copy of the document by filling in the required information.

### Save a Copy of Your Document




Sign up for a FREE DocuSign account today and sign all your documents electronically.

**Email**  
docupace-test@pcsbd.net


**Password**

**Confirm Password**

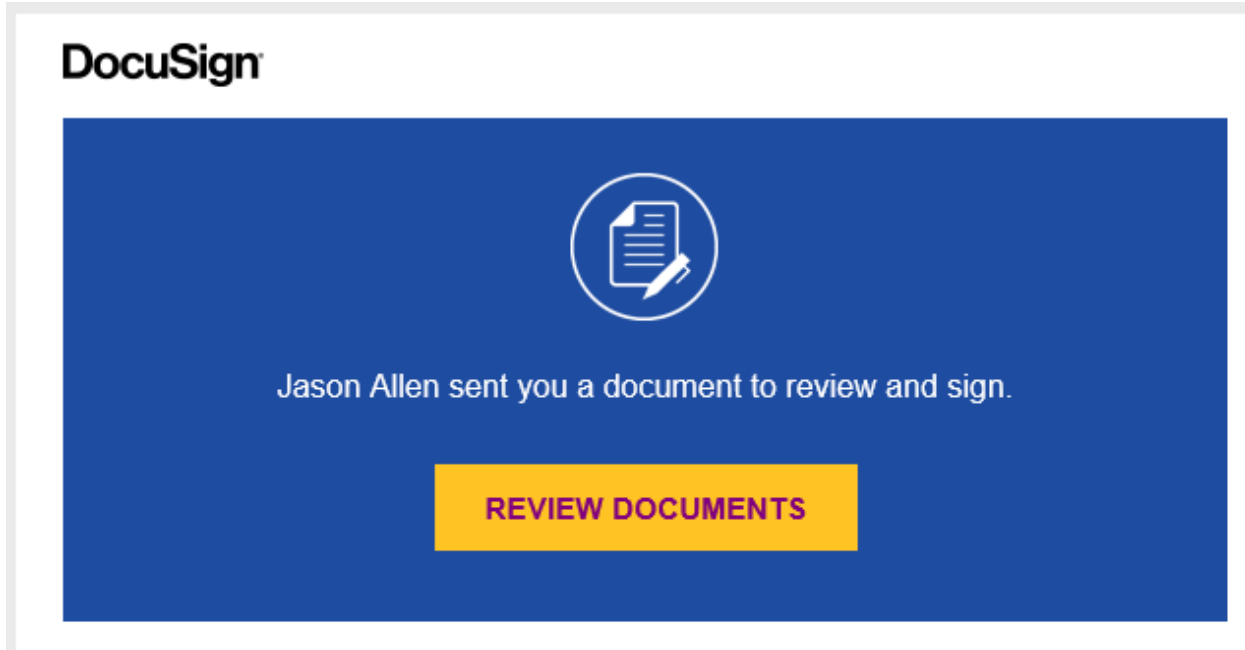
**Country**  
-- select --

-  **Electronically sign any document.**
-  **Get signatures from others.**
-  **Sign on the go with DocuSign Mobile!**

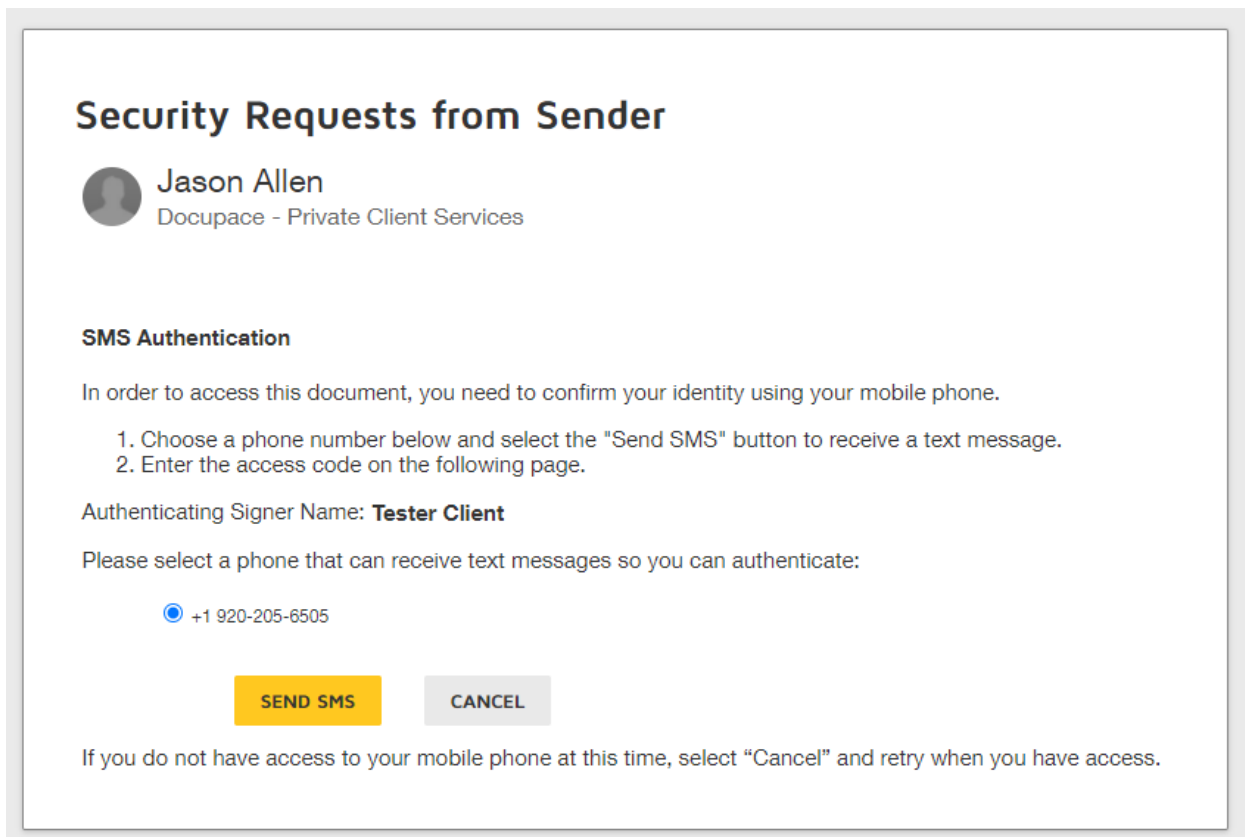
By clicking the 'SUBMIT' button, you agree to the [Terms & Conditions](#) and [Privacy Policy](#).

 **NO THANKS**

A second email is then sent to the next signer at the same address. Click Review Documents.




Verify the second signer's name and mobile phone. Click Send SMS.



Enter the code received via text and click Confirm Code.

### Security Requests from Sender

 **Jason Allen**  
Docupace - Private Client Services

**SMS Authentication**  
An SMS message has been sent to your mobile phone. You should receive it momentarily.

Enter the code you received in the SMS message in the field below and press Confirm Code.

<input type="text"/>	<b>CONFIRM CODE</b>	<b>CANCEL</b>
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If you do not receive an SMS message, select "Cancel", verify the mobile phone number and try sending the SMS message again.

The client will click to agree to using electronic signature. Then click Continue.

Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

**CONTINUE** **OTHER ACTIONS** ▾

Click Start.

**START**

DocuSign Envelope ID: 0D66397D-E462-4CFA-A970-11B3AF5018A2

**PRIVATE CLIENT**

**CLIENT RELATIONSHIP**

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www.docusign.com

The second signer should be taken only to the field they need to sign and should see the previous signer's signature. Click Sign and adopt the signature.

<b>SIGN</b>	DocuSigned by: Primary Account Owner Signature <i>PRIMARY CLIENT</i> 02F4425B34C3483...	Date 5/4/2021	DocuSigned by: Joint Account Owner Signature ↓	Date 5/4/2021
-------------	--	------------------	--	------------------

Continue through the document until all signatures are complete.

**SIGN**

Market Sweep defaults and available products are subject to change.

Primary Account Owner Signature ↓	Date 5/4/2021
Representative Name	RR#

Click Finish.



Clients can elect to save a copy of the document by filling in the required information.

A screenshot of a web form titled 'Save a Copy of Your Document'. The form includes a header with a download icon and a printer icon. Below the title is a grey banner with the text 'Sign up for a FREE DocuSign account today and sign all your documents electronically.' The form fields include: 'Email' (pre-filled with 'docupace-test@pcsbd.net'), 'Password' (empty text box), 'Confirm Password' (empty text box), and 'Country' (dropdown menu with '-- select --'). To the right of the form are three blue circular icons with text: 'Electronically sign any document.', 'Get signatures from others.', and 'Sign on the go with DocuSign Mobile!'. At the bottom are two buttons: a yellow 'SUBMIT' button and a blue 'NO THANKS' button. Below the form, there is a line of text: 'By clicking the 'SUBMIT' button, you agree to the [Terms & Conditions](#) and [Privacy Policy](#).' At the very bottom, there is a grey bar with the text 'Final Review IGO Signatures Received Documents added on 05/04/21'.

The representative will receive an email and go through the same signing process. Once complete, the Work Item Task in Docupace will move from Pending eSign Completion to Final Review.

Final Review	IGO	Signatures Received	Documents added on 05/04/21
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Click on the Work Item to review the signatures and forms and then click Send for Review.

The screenshot shows a software interface with a header area containing the text "Final Review". Below this header, there are two rows of buttons. The first row includes three buttons: "Actions" (with a gear icon and a dropdown arrow), "Reassign" (with a right-pointing arrow icon), and "Work Item Client Documents" (with a grid icon). The second row includes two buttons: "Send for Review" and "Send Back to Pending Advisor Review for eSign". The "Send for Review" button is highlighted with a red rectangular border.