

# DocuSign – A Client Guide

## What is DocuSign?

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DocuSign is an easy to use system which allows us to send, sign and manage documents securely in the cloud without printing and scanning

## Multiple signatories

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DocuSign works for both single or multiple signees.

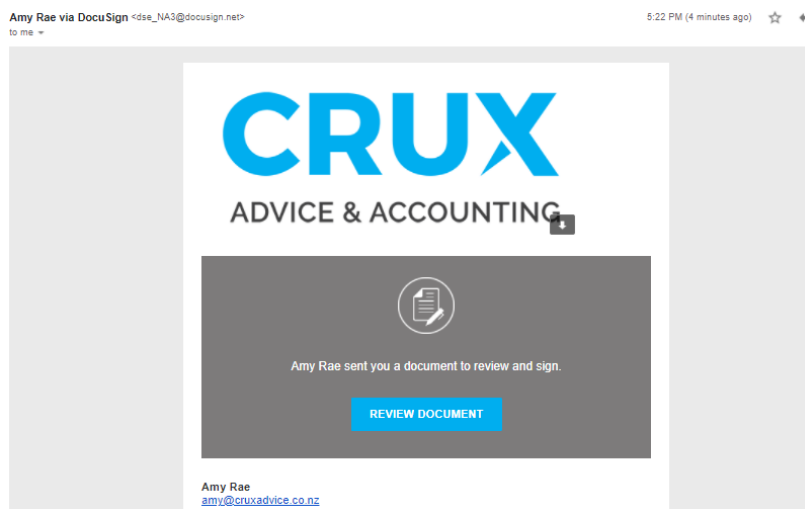
For multiple signees the document sends in an order, once the first person signs the document will then be sent to the next person and so on until all signing is completed.

Once the document is completed all signees will receive an email where they can review or download the documents for your record.

## How to sign your documents

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1. You will receive an email from one of our team in the below form.



2. Click 'review document'.
3. This will open in the below screen once you have read the electronic record and signature disclosure. Tick 'I agree to use electronic records and signatures' and click 'continue'.

## Please Review & Act on These Documents



Amy Rae  
Crux

CRUX  
ADVICE & ACCOUNTING

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Hello Josh Smith,

Please find attached our firm engagement letter for your signing.

If you have any questions please let us know.

Kind regards,

[View Lead](#)

Please read the Electronic Record and Signature Disclosure.  
 I agree to use electronic records and signatures.

**CONTINUE** OTHER ACTIONS ▾

The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix).

**CAANZ**

As members of the Institute of Chartered Accountants Australia and New Zealand ("CAANZ") we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with professional standards by members is monitored.

Information and disclosure

4. Click the 'start' button on the left hand side.

Please review the documents below.

**FINISH** OTHER ACTIONS ▾

**START**

DocuSign Envelope ID: 11C3635D-AB8C-4768-8AED-C24FD97922F

[www.cruxadvice.co.nz](http://www.cruxadvice.co.nz)

**CRUX**  
ADVICE & ACCOUNTING

22 January 2021

Josh Smith

Dear Josh

**Client Engagement – Josh Smith**

The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix).

**CAANZ**

As members of the Institute of Chartered Accountants Australia and New Zealand ("CAANZ") we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with

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5. Click the blue 'next' to take you to your first signature to be completed.

Select the sign field to create and add your signature.

**FINISH** OTHER ACTIONS ▾

**NEXT**

DocuSign Envelope ID: F5EBF315-F825-4F1B-87FB-129B72FC160B

[www.cruxadvice.co.nz](http://www.cruxadvice.co.nz)

**CRUX**  
ADVICE & ACCOUNTING

22 January 2021

Josh Smith

Dear Josh

**Client Engagement – Josh Smith**

The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix).

**CAANZ**


As members of the Institute of Chartered Accountants Australia and New Zealand ("CAANZ") we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with

6. Click the yellow coloured box to sign - the date will automatically be completed.

**SIGN**

Michael Parker  
Director  
Crux Advice & Accounting Limited

I agree with the [Required - Sign Here](#) terms, including the appendix.

**Signature** 

**Name** Josh Smith

**Date** 21-Jan-2021

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7. If it is your first-time using DocuSign, there will be a pop-up box to adopt your signature. This is where you can use a premade signature or draw your own. Once completed click 'adopt your signature'.

The screenshot shows a pop-up window titled "Adopt Your Signature" with a close button (X) in the top right corner. The window contains the following elements:

- Text: "Confirm your name, initials, and signature."
- Text: "Required" (with a red asterisk).
- Form fields: "Full Name\*" containing "Josh Smith" and "Initials\*" containing "JS".
- Buttons: "SELECT STYLE" (underlined) and "DRAW".
- Section: "PREVIEW" with a "Change Style" link on the right. The preview shows a handwritten signature "Josh Smith" and initials "JS".
- Text: "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."
- Buttons: "ADOPT AND SIGN" (highlighted in blue) and "CANCEL".

8. This is what it will look like once you have inserted your signature.

The screenshot shows a document with the following content:

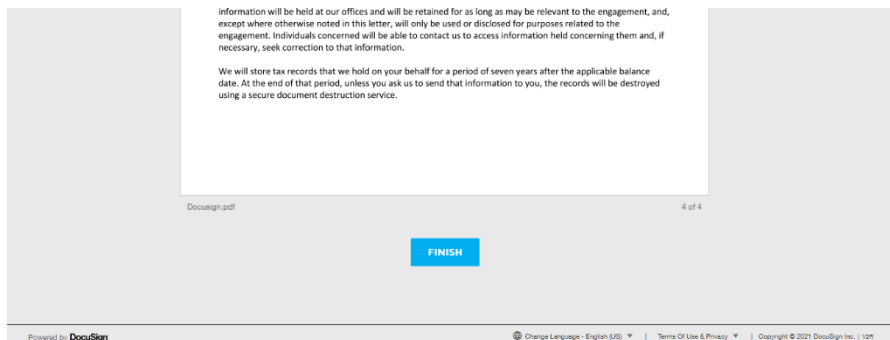
- A horizontal line.
- Text: "I agree with the above engagement terms, including the appendix."
- Text: "Signature" followed by a handwritten signature "Josh Smith" on a line.
- Text: "Name" followed by "Josh Smith" on a line.
- Text: "Date" followed by "21-Jan-2021" on a line.

9. Keep clicking next and repeating the signing steps (5&6)

The screenshot shows the DocuSign envelope preview screen with the following elements:

- Header: "Select the sign field to create and add your signature." and buttons "FINISH" and "OTHER ACTIONS".
- DocuSign Envelope ID: F5EBF315-F825-4F1B-87FB-129B72FC160B
- Logo: "www.cruxadvice.co.nz" and "CRUX ADVICE & ACCOUNTING".
- Date: "22 January 2021".
- Name: "Josh Smith".
- Text: "Dear Josh".
- Section: "Client Engagement – Josh Smith".
- Text: "The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix)."
- Section: "CAANZ".
- Text: "As members of the Institute of Chartered Accountants Australia and New Zealand (CAANZ) we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with".
- Button: "NEXT" (highlighted in blue).

10. Once you have signed all your required areas, scroll to the bottom and click 'finish'



11. If you want to create a DocuSign account, complete the details, if you prefer not to, click no thanks.

The screenshot shows a form titled "Save a Copy of Your Document" with a download icon and a print icon. Below the title is a grey bar with the text "Sign up for a FREE DocuSign account today and sign all your documents electronically." The form contains the following fields: "Email" with the value "kanefin96@gmail.com", "Password" (empty), "Confirm Password" (empty), and "Country" (dropdown menu with "-- select --"). To the right of the form are three icons with text: "Electronically sign any document.", "Get signatures from others.", and "Sign on the go with DocuSign Mobile!". At the bottom, there is a blue "SUBMIT" button and a "NO THANKS" link. Below the form, there is a note: "By clicking the 'SUBMIT' button, you agree to the Terms & Conditions and Privacy Policy."

12. You have now completed everything in DocuSign. Your documents will be emailed to you as PDF's once all signers are done. Please note, you may not receive these straight away as there may be multiple signers after you.

**DocuSign**

# You're All Done!

You'll receive a copy once everyone has signed.