



momentum

Process flow from start to end
Process from IFA office to client (signatory)



m sign

Process flow from start to end | Process from IFA office to client (signatory)

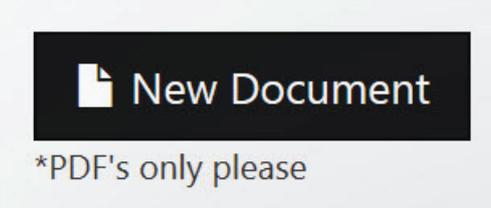
The process allows for the use of e-mail and OTP for verification and a document can be signed on a **laptop, tablet or other smart device** by *signing, typing or adding a picture*. The process of applying a signature is always under the control of the signatory.

- Once everyone has signed the document, a **copy of the completed pdf is automatically emailed to all role players**, including the sender/document owner.

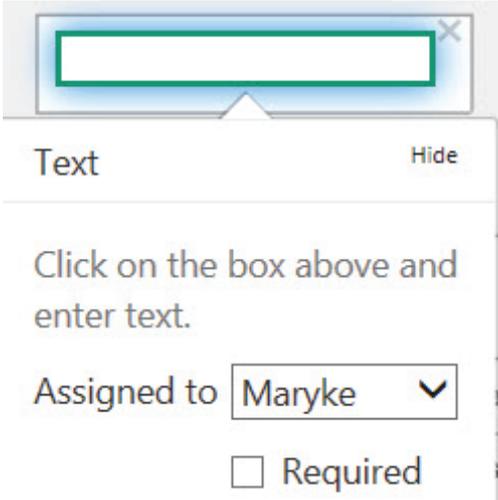
The process automatically encrypts all signed documents and provides a **verifiable audit log** that is automatically added to the original signed document. The document and audit log cannot be generated and/or e-mailed if the document has not been completed and correctly signed. The audit trail allows for an easy "on-face value" functionality to verify and authenticate the transaction.

The process is as follows:

1 User (e.g. financial adviser or office assistant) uploads the document to MSign



2 Places boxes/fields where **the client must sign** (you can also add your **own signature** next to "Signature of financial adviser")



3 The document owner sends/requests the signature(s) via email



4

The **client (signatory)** will open the document by clicking the unique link in the email and entering an OTP

Hi Maryke,

Maryke would like you to sign a document.

For your convenience Momentum has chosen a paperless, electronic signature solution. It is eco-friendly, easy to use and 100% legally binding.

Click the button below to review and sign a document on our secure platform.

[View document](#)

Kind regards,
The mSign team

A one time pin (OTP) has been sent to

Please enter one time pin

OTP didn't arrive? [Request new OTP](#)

5

Once all the necessary fields/boxes have been completed, the signatory will click **"Done signing"** at bottom of page to agree and submit the signed document. **Signatories can only sign in areas indicated for the signature**



Nearly done, click *Submit* to confirm you are finished.

✓

6

Once all signatories have signed the document, **a copy of the completed PDF is automatically emailed** to all involved, including the **sender and the document owner**. Complete OTP to view signed document

m sign

Hi Maryke ,

INVEST000E (3).pdf has been signed by all parties and pdf copy has been attached to this email.

To view the original signed document online, click the button below.

[View document](#)

A one time pin (OTP) has been sent to

OTP didn't arrive? [Request new OTP](#)

7 The audit trail of **all activity on the document** is added to the signed document (audit trail tracks the time, date and IP address)

Audit Trail

2020-03-18 15:24:11 SAST+0200: Status marked as complete. Signed copies have been emailed to all parties.
2020-03-18 15:24:06 SAST+0200: mpretorius@momentum.co.za (Maryke) completed signing document 41.66.162.68
2020-03-18 15:22:42 SAST+0200: MPretorius@momentum.co.za (Maryke) opened document 41.66.162.68
2020-03-18 15:22:42 SAST+0200: MPretorius@momentum.co.za (Maryke) entered correct otp 41.66.162.68
2020-03-18 15:21:57 SAST+0200: OTP message delivered to +27823770971
2020-03-18 15:21:53 SAST+0200: OTP sent to: +27823770971 (Maryke)
2020-03-18 15:21:11 SAST+0200: Email has been received by mpretorius@momentum.co.za mail server 167.89.84.21
2020-03-18 15:21:06 SAST+0200: Email is ready to be sent to mpretorius@momentum.co.za
2020-03-18 15:21:05 SAST+0200: Signature request sent to: MPretorius@momentum.co.za (Maryke)
2020-03-18 15:20:58 SAST+0200: mpretorius@momentum.co.za (Maryke) changed the status to:awaiting_signatures
41.66.162.68
2020-03-18 15:16:31 SAST+0200: mpretorius@momentum.co.za (Maryke) uploaded document 41.66.162.68

8 Download the document

Download document 

9 Completed documents can be viewed

 New Document
*PDF's only please

Documents Templates

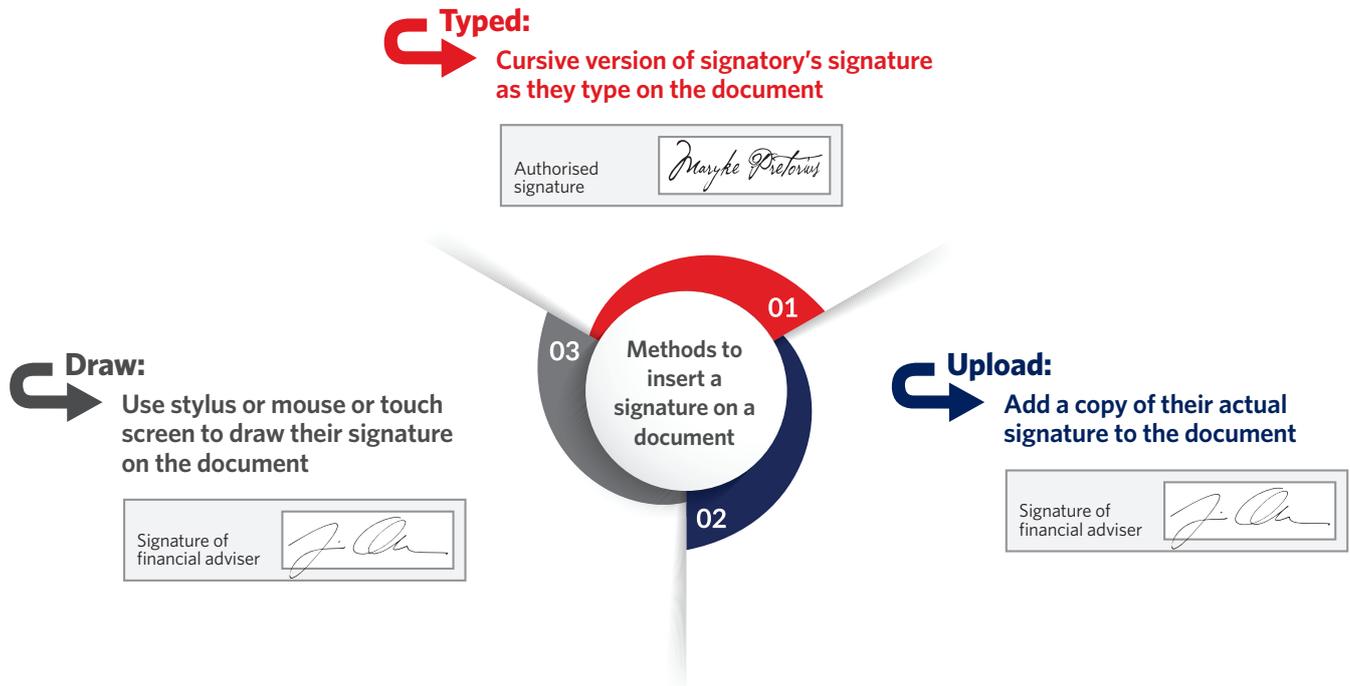
Enter search term...  Filter by status: all 

Status	Created by	Recipients	Name	Actions
complete	mpretorius@momentum.co.za	MPretorius@momentum.co.za	INVEST0000E (3).pdf	View 

10 In addition to this, the **PDF is encrypted and includes a verification link** (where you can upload the document to verify)

More information:

1. Use one of three methods to insert a signature on a document:



2. The entire process is tracked and recorded in the audit trail, attached as the last page of the completed PDF. The audit trail tracks the following along with the time, date, IP address of each:

- Who uploaded the document and who sent it for signature
- Who the signatories are
- When the email landed on the signatory's server and when he/she opened the document
- When the signatory signed the document and when it was completed
- When reminders to sign the document are sent
- When each completed document email is opened
- When the document has been downloaded directly from MSign
- Email and OTP bounces
- Invalid and valid OTP challenges

Need technical support?

For a library of Frequently Asked Questions and the answers thereto, [click here](#).

Simply click on the "chatbox" button on the MSign site for support from the QuicklySign team or you can send an email to: etshelpdesk@momentum.co.za for technical assistance. You can also contact them at 0860 999 932.