



Get more value from Docusign eSignatures

Your questions, answered.

Thanks for joining us!

We've compiled the most common questions from the webinar and provided answers below to help you get started with Docusign eSignatures.

Webinar Date: 15 September 2026

Account Access

Q. Do clients need a myprosperity account to sign documents?

Yes. Clients must activate their myprosperity account and log in before they can complete an eSignature request or other outstanding tasks. The signing request cannot be completed directly from the email notification, as the link will direct the client to log in to their myprosperity account or activate their account.

Q. Do advisers or other signers need their own myprosperity account?

Yes. Any user required to complete a signing task must have a myprosperity account.

Q. How do I get a client set up before sending an eSignature request?

Clients must have an active myprosperity account before they can complete an eSignature request.

You can either:

- Invite the client to the portal and ask them to activate their account before sending the request, or
- Send the eSignature request directly. If the client does not yet have an active account, they'll be prompted to activate their myprosperity account before they can access and sign the document.

Q. Is two-factor authentication available?

Yes. Two-factor authentication (2FA) is available through the myprosperity portal and can be configured using SMS or an authenticator app.

When an eSignature request is sent, clients are required to log in to their myprosperity account before they can access and sign the document. They will be prompted to complete the authentication step as part of the login process.

There is no separate two-factor authentication setup required within the Docusign component, as authentication is managed through the myprosperity portal.



Signature Options

Q. Can I make Draw Signature the default option for clients?

A default signing style cannot be configured. Clients choose their preferred signing method when signing for the first time. This selection becomes their default signing method for future requests. However, clients can update their signing preference at any time by editing the eSign.

Q. Can I choose whether clients use a drawn signature or typed signature?

Clients choose their preferred signing style when they first sign a document. However, clients can update their signing preference at any time by editing the eSign.

Q. How can I encourage clients to use a specific signature style?

You can include instructions within the message sent with the eSignature request.

Q. Is a view-only recipient option available?

A view-only recipient option is not currently available.

Creating & Managing eSignature requests

Q. Can I edit an eSignature request after it has been created?

Once an eSignature request has been created, it can no longer be edited. If changes are required, create a new request.

Q. Can I amend a document in the eSignature request if the client hasn't signed yet?

Documents cannot be amended once they are included in an eSignature request. To make changes, delete the request and create a new one.

Q. Can I change a recipient's email address after sending?

Recipient details cannot be updated after a request has been sent. Create a new request with the correct details.

Q. Can I change the email message after sending?

The email message is locked once a request has been sent. To update the message, create a new request.

Q. Can I add or remove documents from a signing package after it has been created?

Documents cannot be added to or removed from an existing signing package. Create a new package with the required documents.

Q. Can I correct or amend a document after it has been sent?

Once a document enters the signing workflow, it cannot be modified. Any required changes must be made before creating a new request.



Documents & File limits

Q. Can multiple uploaded documents be saved to different locations?

All documents included in the same eSignature request are saved to the one selected location.

Q. What happens if my documents exceed the 50 MB file limit?

Documents that exceed the 50 MB package limit should be split across multiple eSignature requests.

Q. Can I download a partially signed document?

No. Documents can only be downloaded once the signing process has been completed by all recipients. If the document is still awaiting signatures, you can view its status from the Pending tab withing eSignatures, where you'll be able to see outstanding signatures and track progress.

Q. Is there a delete option for eSignature documents?

Yes. Documents can be deleted through the eSignatures area.

Q. Can I recover a signed document that has been deleted?

Signed documents cannot be recovered once they have been deleted.

Tracking & Notifications

Q. How do I see who has signed and who is still waiting to sign?

Select View Details on the eSignature package to view completed and pending recipients.

Q. Can I see which recipient hasn't signed when there are multiple signers?

Yes. The signing status of each recipient is available within the package details. Select View Details on the eSignature package.

Q. Will completion notifications identify the client?

Yes. Completion notifications include the client's name.

Q. What does the Actions menu include?

Depending on your configuration, available actions may include:

- View Details
- Send Reminder
- Download Document
- Delete Request
- Sync actions when supported integrations are enabled



Reminders

Q. When are automatic reminders sent?

Automatic reminders are sent after 3, 6 and 9 days.

Q. Do reminders continue after day 9?

Automatic reminders stop after day 9. Outstanding requests can continue to be monitored and followed up manually.

Q. Can I send a reminder to only one recipient?

Reminders are sent to all recipients who are still required to sign the package.

Other Questions

Q. Can I change the sender email address?

All eSignature notifications are sent from no-reply@myprosperity.com.au.

Q. Can I create reusable email templates for signing requests?

Messages are currently entered manually when creating an eSignature request.

Q. Is the signing certificate displayed in Australian date format?

Yes. The signing certificate displays Australian date formatting.

Q. Where can I find help for more advanced Docusign functionality?

For advanced functionality such as conditional fields, radio buttons and workflow rules, refer to the Docusign Help Centre.

Q. Is there an annual limit on the number of signing packages we can send?

Signing package allowances vary by plan. Refer to the [myprosperity pricing page](#) for current limits.

Need More Help?

If you need additional assistance, please visit the myprosperity [Help Centre](#) or contact our Support team at support@myprosperity.com.au

This FAQ has been compiled from questions raised during the Docusign eSignatures webinar held on 15 September 2026. Product functionality may change over time. Please refer to the Help Centre for the latest guidance.