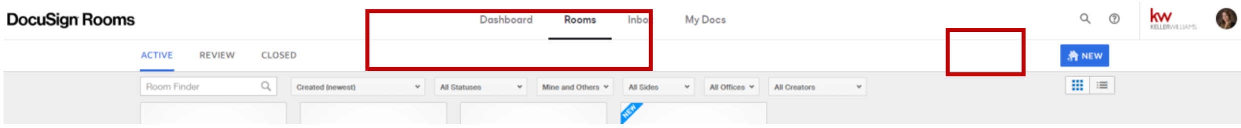
HOW TO USE DOCUSIGN ROOMS – with Templates

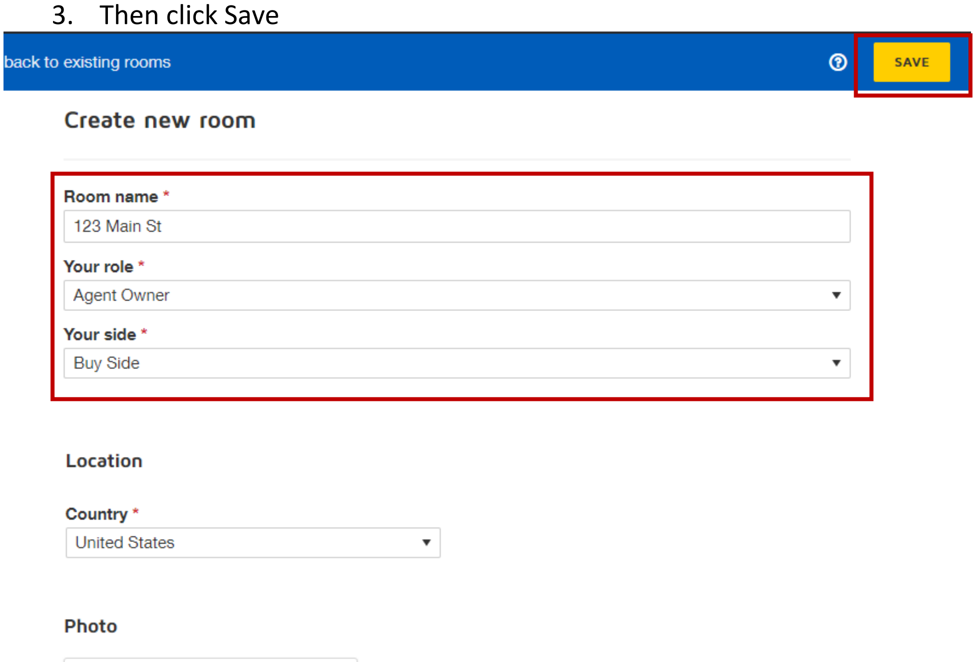
Set up a new room, create an envelope, add a document with a template to send for signatures!

Log in to Docusign -- Realestate.docusign.com/transactions

1. To create a new room:
    a. Make sure you are under the ROOMS tab and click on the blue NEW button



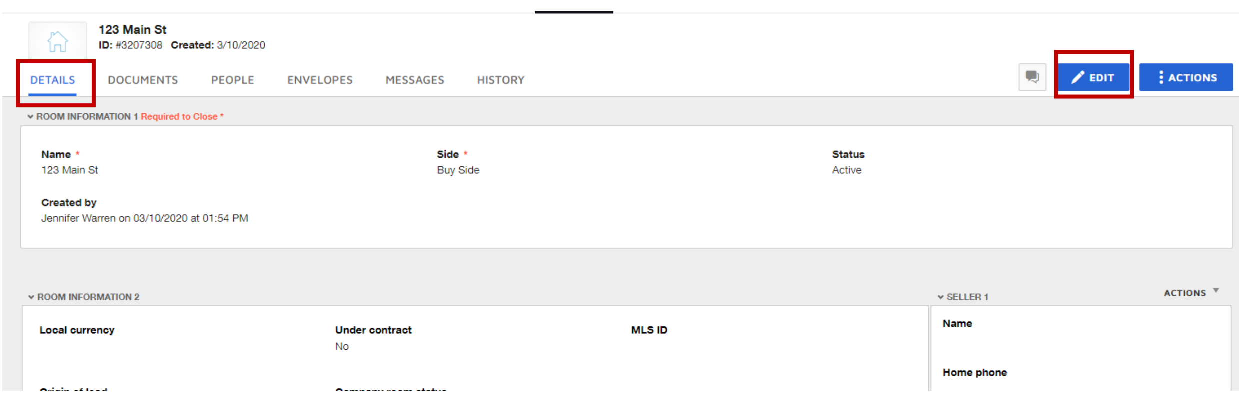
2. Room Name: Should probably be the client's last name (buyers) or property address (Listings)
    a. Your Role: AGENT OWNER
    b. Your Side: Buy or sell
    c. You do not need to change the country or upload a photo
3. Then click Save

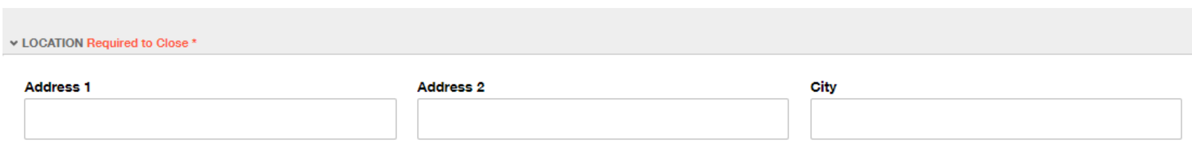


Complete the details as you can

1. Enter the details:
2. You should be in the details tab. Click on the blue EDIT button in the upper right corner.
3. Enter your client's details – Name and Phone Number at a minimum. You can add the
4. If you enter other details, they should populate into the documents, but may not 😊
5. You can also add the property address in the location section

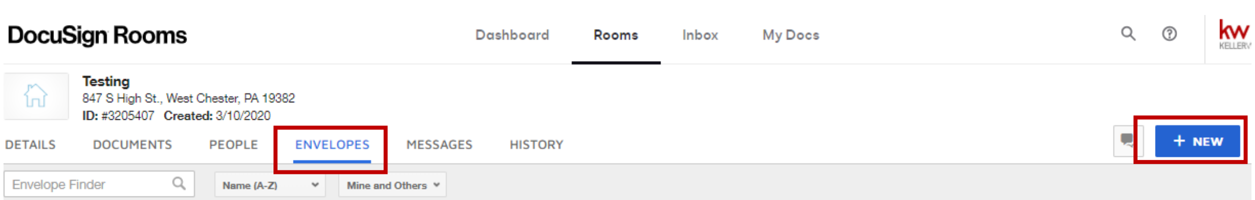
6. When details are entered, click on SAVE in the bottom right corner.



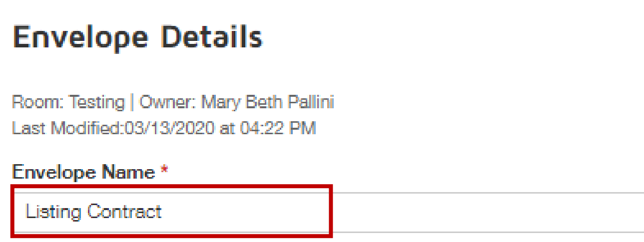


SET UP YOUR DOCUMENTS

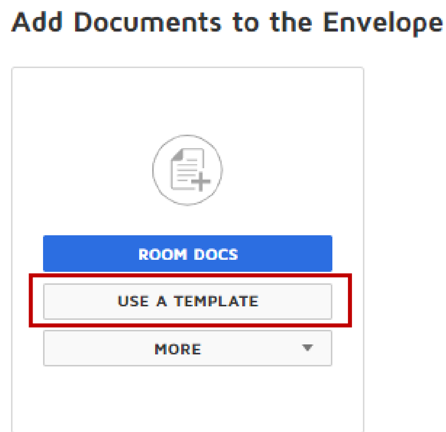
1. When you need to use a template, you can click on ENVELOPES tab,
2. Click the blue NEW button and select
3. This will take you to the “e-Signature” part of Docusign (that some of you are familiar with).



On this screen you will name the envelope with what Documents you are sending. You are the only one that will see this.

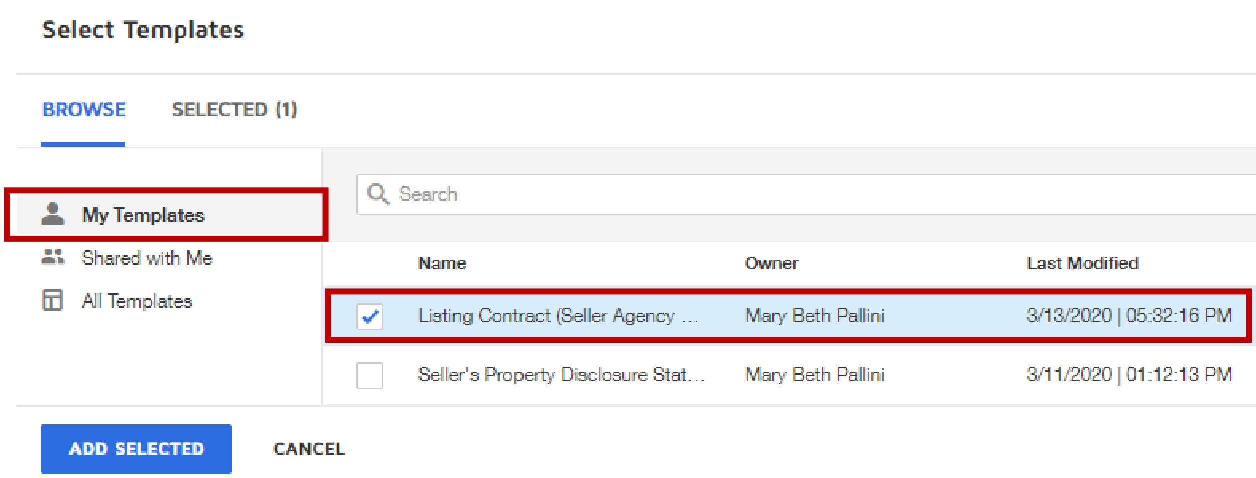


Click on USE A TEMPLATE

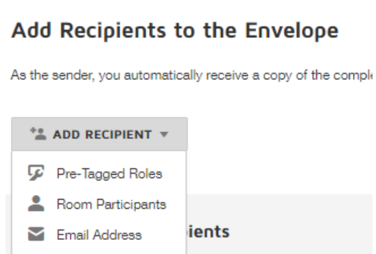


1. Select the template(s) you want to use.
2. Be sure to select ONLY out of the MY TEMPLATES folder!
3. Click on ADD SELECTED

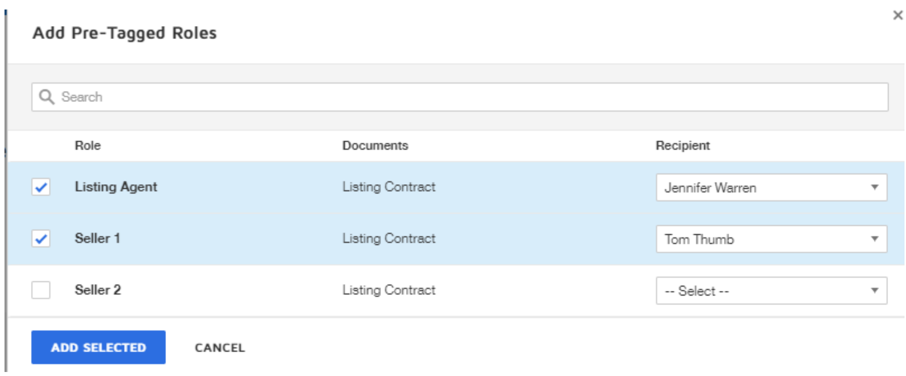
****IF you select Shared with me, and you edit the document, you are editing the document for the ENTIRE KW EXTON OFFICE!!!



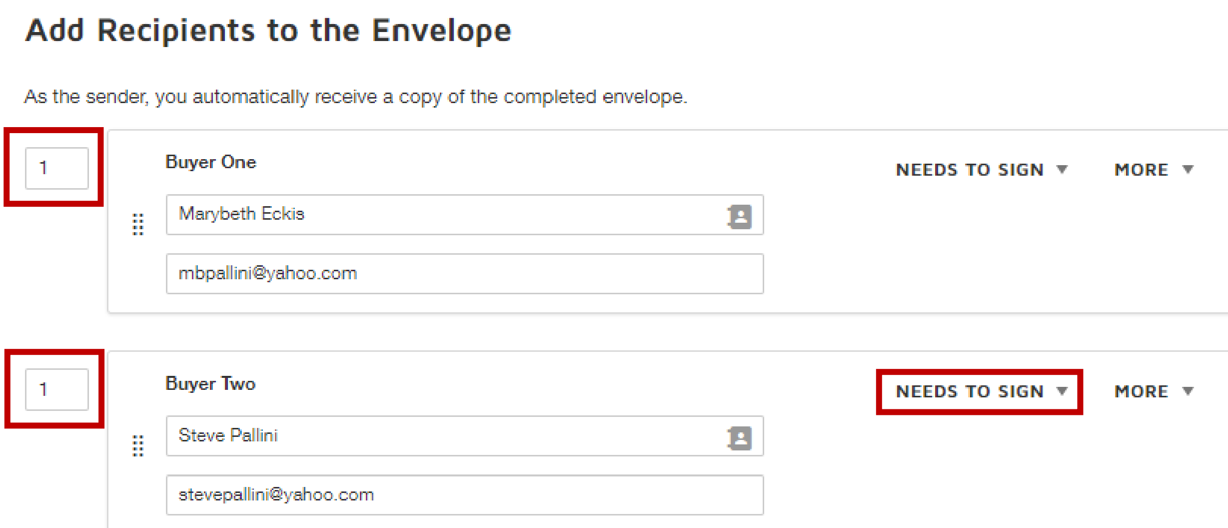
Then you will need to add recipients



1. Here you want to choose Pre-Tagged Roles
2. This is from where you entered details about your client in step 2!
3. Choose the recipients and click on ADD SELECTED



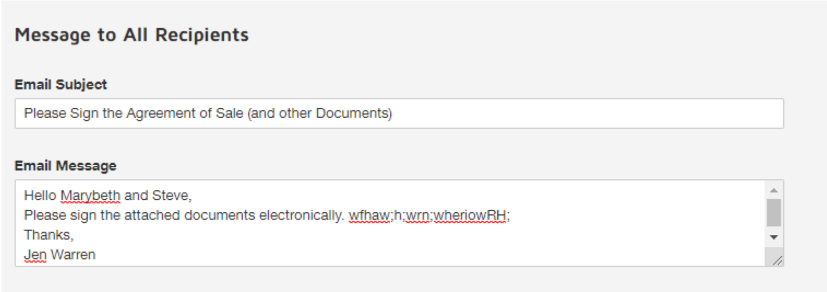
The recipients should populate:



You can change their ability and order in which they sign or just view.

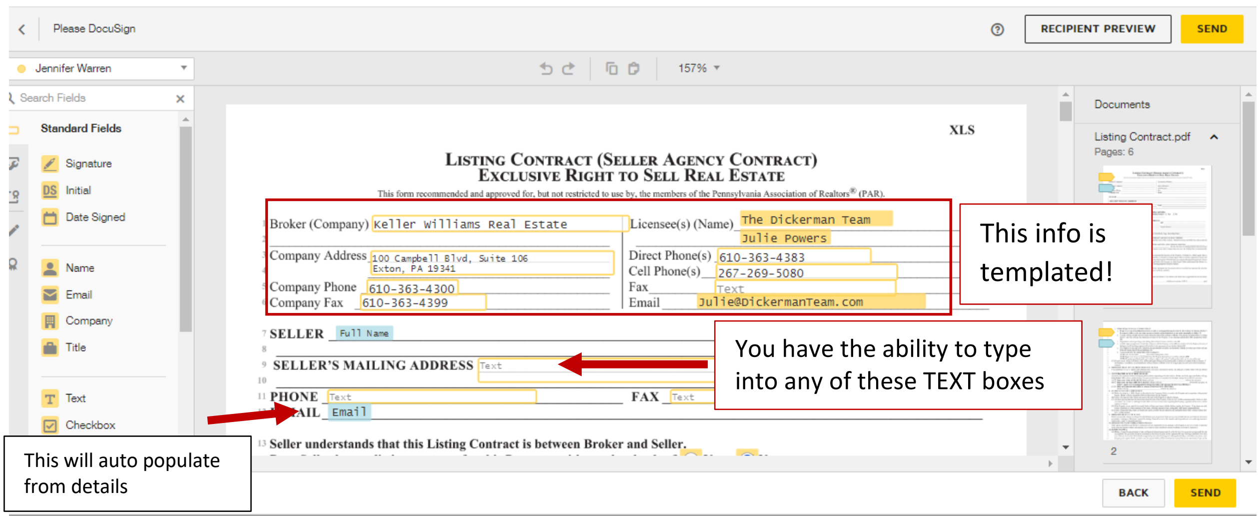
In this example, the recipients will receive at the same time, and there is no order for them to sign. If there was a 2 in the box by BUYER 2, BUYER 1 would have to sign before BUYER 2. If BUYER 2 only needs to view, you can select that under the NEEDS TO SIGN drop down.

Edit the email subject line and message:



Click on the Yellow NEXT button in the Top Right hand corner.

Here you will see the following:



- You can add more text boxes if you need to by dragging and dropping the text field from the left column.
- You can delete text boxes if you don't want of need them. They will appear as BLANK lines when the document is sent. They will not show up the way they look in this view!
- Scroll through the document(s) and make any other changes you need to.

Once you are certain the document looks good and ready, Click on SEND!!