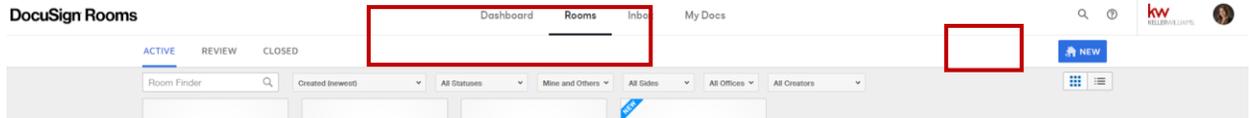


HOW TO USE DOCUSIGN ROOMS – with Templates

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



Create new room

Room name *

Your role *

Your side *

Location

Country *

Photo

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.

123 Main St
ID: #3207308 Created: 3/10/2020

DETAILS DOCUMENTS PEOPLE ENVELOPES MESSAGES HISTORY

ROOM INFORMATION 1 Required to Close *

Name *	Side *	Status
123 Main St	Buy Side	Active

Created by
Jennifer Warren on 03/10/2020 at 01:54 PM

ROOM INFORMATION 2

Local currency	Under contract	MLS ID	SELLER 1	ACTIONS
	No		Name	
			Home phone	

LOCATION Required to Close *

Address 1 Address 2 City

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).

DocuSign Rooms Dashboard Rooms Inbox My Docs

Testing
847 S High St., West Chester, PA 19382
ID: #3205407 Created: 3/10/2020

DETAILS DOCUMENTS PEOPLE ENVELOPES MESSAGES HISTORY

Envelope Finder Name (A-Z) Mine and Others

+ NEW

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

Envelope Details

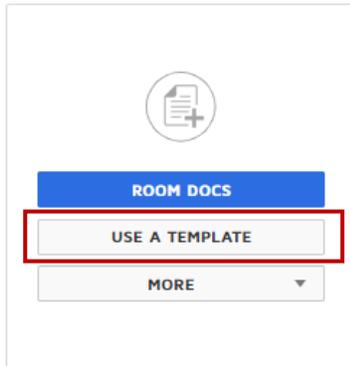
Room: Testing | Owner: Mary Beth Pallini
Last Modified:03/13/2020 at 04:22 PM

Envelope Name *

Listing Contract

Click on USE A TEMPLATE

Add Documents to the Envelope



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!!!

Select Templates

BROWSE **SELECTED (1)**

My Templates Search

Shared with Me

All Templates

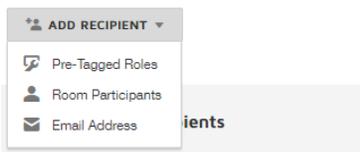
	Name	Owner	Last Modified
<input checked="" type="checkbox"/>	Listing Contract (Seller Agency ...	Mary Beth Pallini	3/13/2020 05:32:16 PM
<input type="checkbox"/>	Seller's Property Disclosure Stat...	Mary Beth Pallini	3/11/2020 01:12:13 PM

ADD SELECTED CANCEL

Then you will need to add recipients

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the compl



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

Add Pre-Tagged Roles ×

Q Search

Role	Documents	Recipient
<input checked="" type="checkbox"/> Listing Agent	Listing Contract	Jennifer Warren
<input checked="" type="checkbox"/> Seller 1	Listing Contract	Tom Thumb
<input type="checkbox"/> Seller 2	Listing Contract	-- Select --

ADD SELECTED CANCEL

The recipients should populate:

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

1

Buyer One

NEEDS TO SIGN ▼ MORE ▼

Marybeth Eckis

mbpallini@yahoo.com

1

Buyer Two

NEEDS TO SIGN ▼ MORE ▼

Steve Pallini

stevepallini@yahoo.com

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:

Message to All Recipients

Email Subject
Please Sign the Agreement of Sale (and other Documents)

Email Message
Hello [Marybeth](#) and Steve,
Please sign the attached documents electronically. [wfhaw:h.wrn.whenrowRH](#);
Thanks,
[Jen Warren](#)

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

Here you will see the following:

The screenshot shows the DocuSign interface for a document titled "LISTING CONTRACT (SELLER AGENCY CONTRACT) EXCLUSIVE RIGHT TO SELL REAL ESTATE". The document is in XLS format and is being previewed by Jennifer Warren. The interface includes a "RECIPIENT PREVIEW" button and a "SEND" button in the top right corner. A "Standard Fields" sidebar on the left lists various field types: Signature, Initial, Date Signed, Name, Email, Company, Title, Text, and Checkbox. The document preview shows a form with several fields filled out, including "Broker (Company) keller williams Real Estate", "Licensee(s) (Name) The Dickerman Team", "Company Address 100 Campbell Blvd, Suite 106 Exton, PA 19341", "Direct Phone(s) 610-363-4383", "Cell Phone(s) 267-269-5080", "Company Phone 610-363-4300", "Fax TEXT", and "Company Fax 610-363-4399". A red box highlights the "Broker (Company)" and "Licensee(s) (Name)" fields, with a callout stating "This info is templated!". Another red box highlights the "SELLER'S MAILING ADDRESS" field, with a callout stating "You have the ability to type into any of these TEXT boxes". A red arrow points from the "Standard Fields" sidebar to the "SELLER'S MAILING ADDRESS" field, with a callout stating "This will auto populate from details". The document preview also shows a "Documents" sidebar on the right with a "Listing Contract.pdf" file (6 pages) and a "BACK" button and "SEND" button at the bottom right.

- 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!!