# HOW TO USE DOCUSIGN ROOMS
Uploading a signed document for more signatures

Set up a new room, create an envelope, add a document to send for signatures!
Log in to Docusign -- Realestate.docusign.com/transactions

If you have a room for this client, click on that room.

To create a new room if you don't have one for this client yet:

Make sure you are under the ROOMS tab and click on the blue NEW button
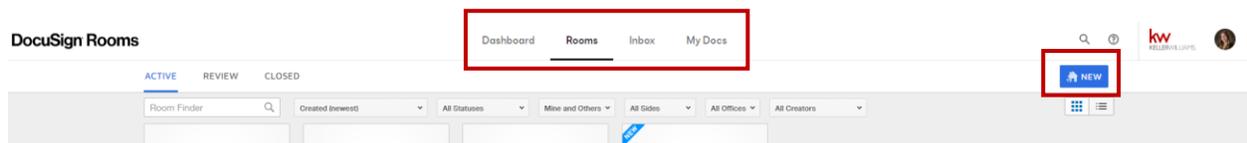
Room Name: Should probably be the client's last name (buyers) or property address (Listings)

Your Role: AGENT OWNER

Your Side: Buy or sell

You do not need to change the country or upload a photo

Then click Save

Create new room

Room name *
123 Main St

Your role *
Agent Owner ▼

Your side *
Buy Side ▼

Location

Country *
United States ▼

Photo

SET UP YOUR DOCUMENTS in an ENVELOPE

This is if you are sending a document that is signed by one party already. *Ex: Listing Agent is sending and AOS for signature from our client.*

Here you are going to click on ADD DOCUMENTS.

Choose the file from the location you have the document (Computer or Dropbox will be the main choices)

123 Main St
575 Taylor Rd, Downingtown, PA 19335
ID: #3207308 **Created:** 3/10/2020

DETAILS **DOCUMENTS** PEOPLE ENVELOPES MESSAGES HISTORY

Document Finder 🔍 | Name (A-Z) ▼ | Active Documents ▼

💬 **+ ADD** ⫶ **ACTIONS**

🖥 Computer

📄 DocuSign Forms

🌀 Zipform®

📦 Box

Dropbox

Google Drive

⌄ ROOM DOCS (0)

There are no documents here.

Add Documents to Your Room

Add your documents to store and manage them in this room. You can then instantly share them with other members within this room or email and fax them to individuals who do not yet have an account.

Upload Documents ›

You cannot edit the uploaded documents until you have them in an envelope!! (Next Step)

SEND YOUR FORMS in and Envelope

Choose the document you want to get ready for signature (by checking the little circle in upper left corner of document) and choose the PEN button (docusign) to prepare/fill forms.

Name your envelope.

Only you will see this – the client will NOT.

You might name it something relating to the forms within the envelope.

Add Recipients:

If your clients are added to the room details, you can choose ROOM PARTICPIANTS

Or you can just enter their names and email addresses.

NOTE: These are NOT pre-tagged as Buyer 1 or Buyer 2, You will have to drag and drop signature fields!!

You can change their permissions and order in which they sign or just view if needed
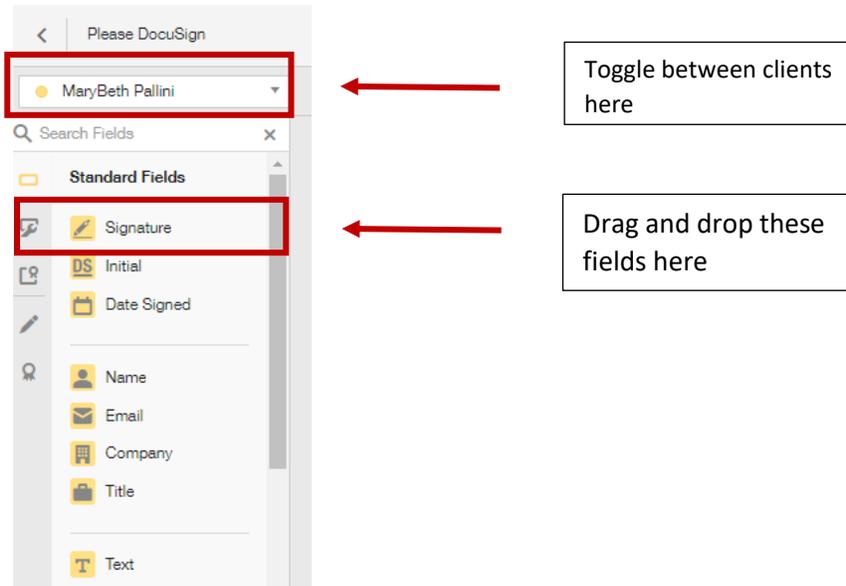
Edit the email subject line and message:

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

In this step, you will add the initial/signature/date and/or other fields if needed.

Please remember if you are sending to multiple people, that you put fields for both of them by toggling between them at the top

Please DocuSign

MaryBeth Pallini ▾ ← Toggle between clients here

🔍 Search Fields ✕

▭ **Standard Fields**

✎ Signature ← Drag and drop these fields here

DS Initial

📅 Date Signed

👤 Name

✉ Email

🏢 Company

💼 Title

T Text

Once you have all the signatures in place, you can click SEND in the upper right corner and it will send to everyone who needs signatures.