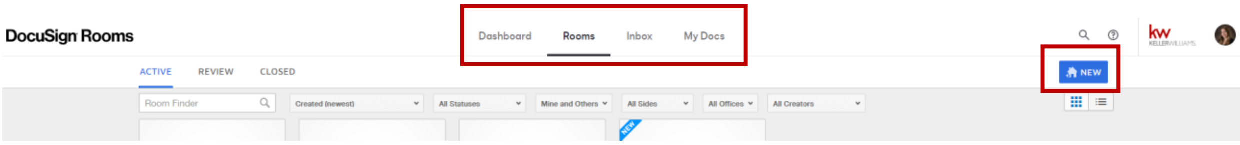
HOW TO USE DOCUSIGN ROOMS – Without using Templates

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

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

To create a new room:

Make sure you are under the ROOMS tab and click on the blue NEW button



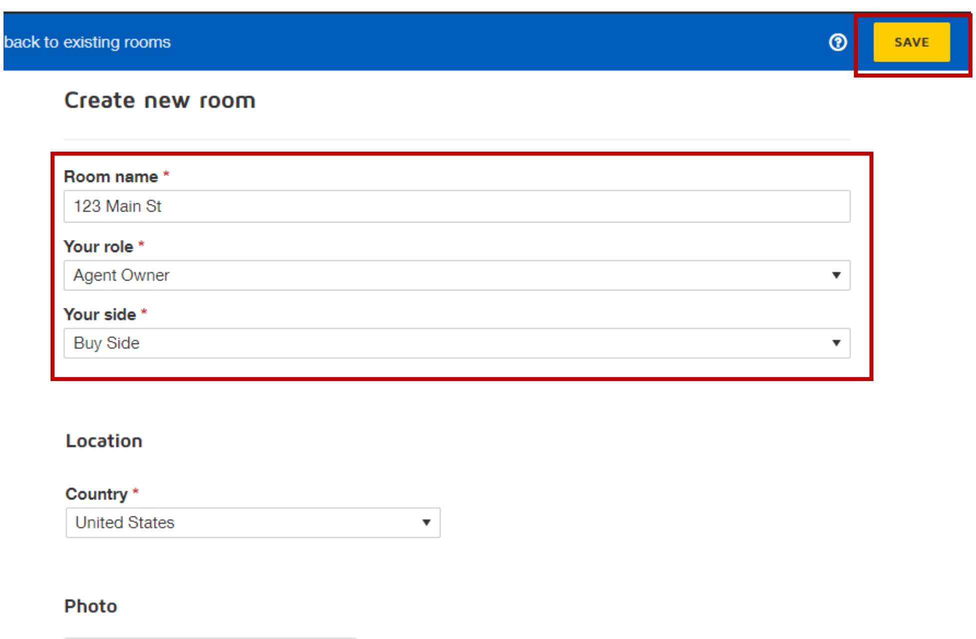
Room Name: Should probably be the client's last name (buyers) or property address (Listings)

Your Role: AGENT OWNER

Your Side: Buy or sell

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

Then click Save



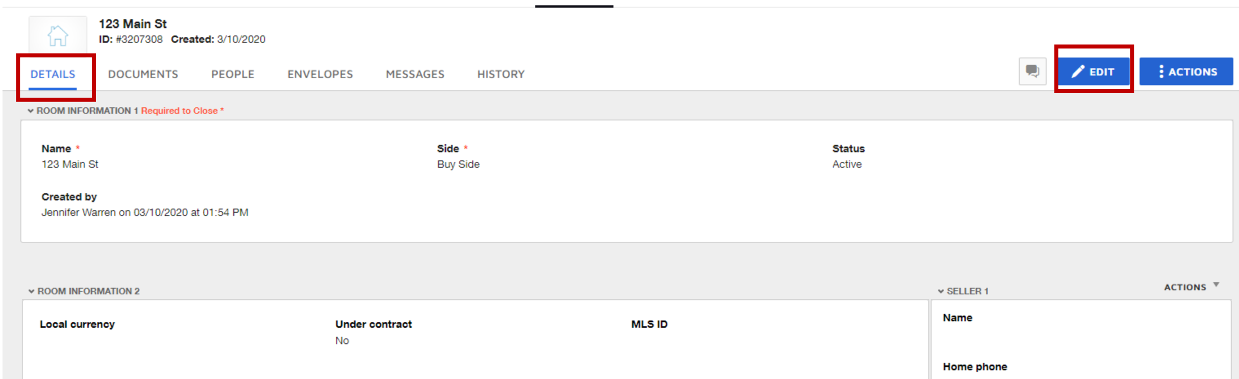
Complete the details as you can

Enter the details:

You should be in the details tab. Click on the blue EDIT button in the upper right corner.

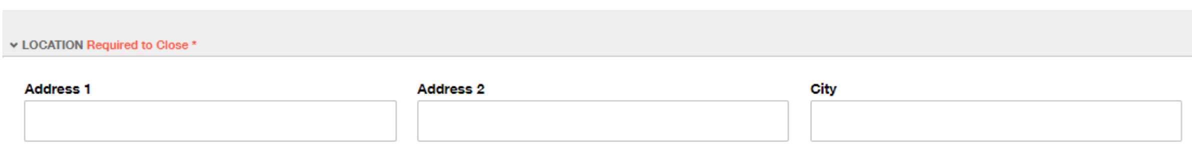
Enter your client's details – Name and Phone Number at a minimum. You can add the

If you enter other details, they should populate into the documents, but may not 😊



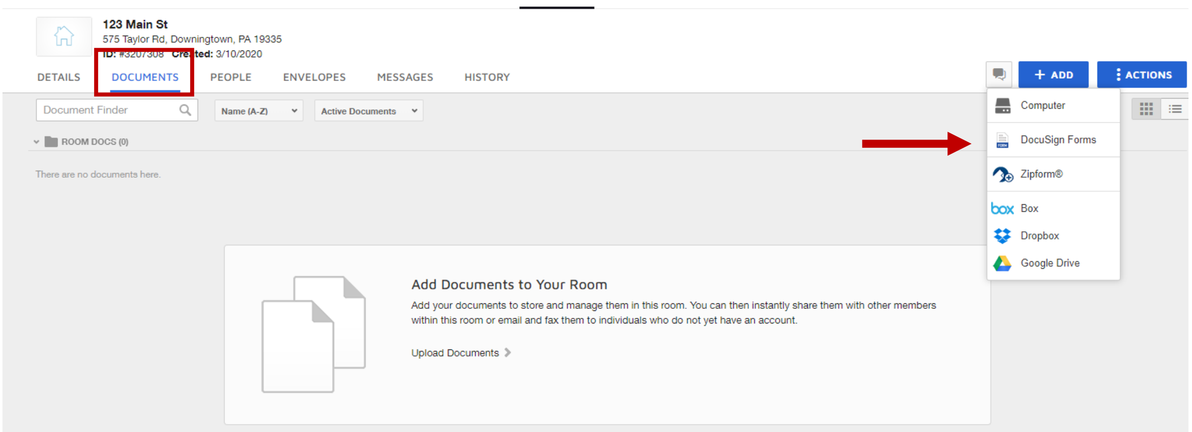
When details are entered, click on SAVE in the bottom right corner.

You can also add the property address I the location section



SET UP YOUR DOCUMENTS

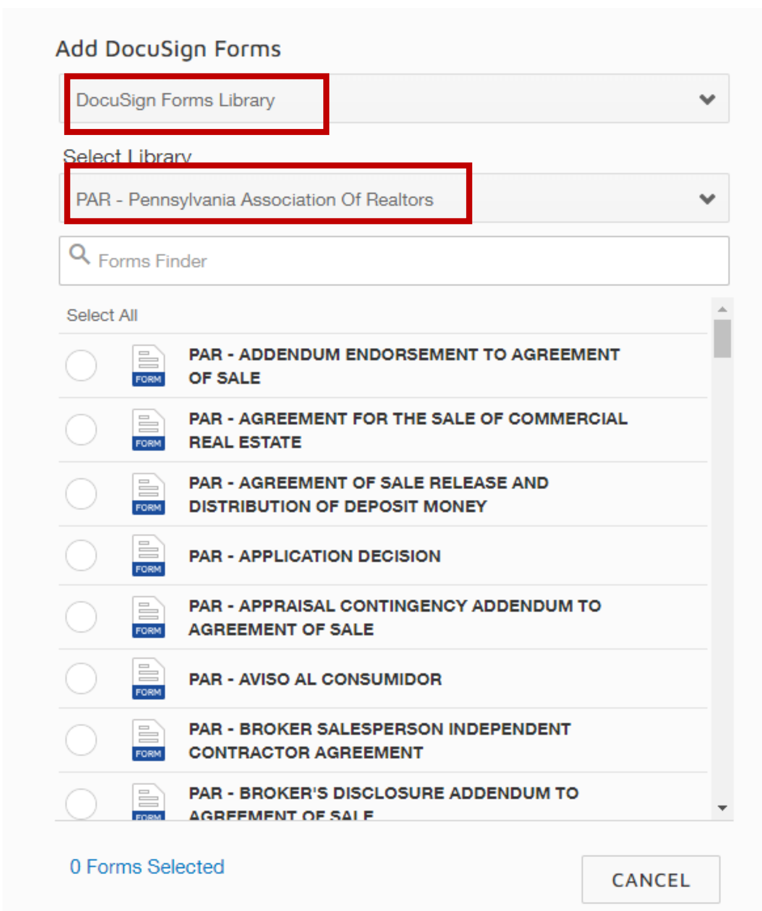
Without using a template, you can click on DOCUMENTS tab, click the blue ADD button and select Docusign Forms



Choose Docusign Forms Library

And Select PAR – Forms in Select Library

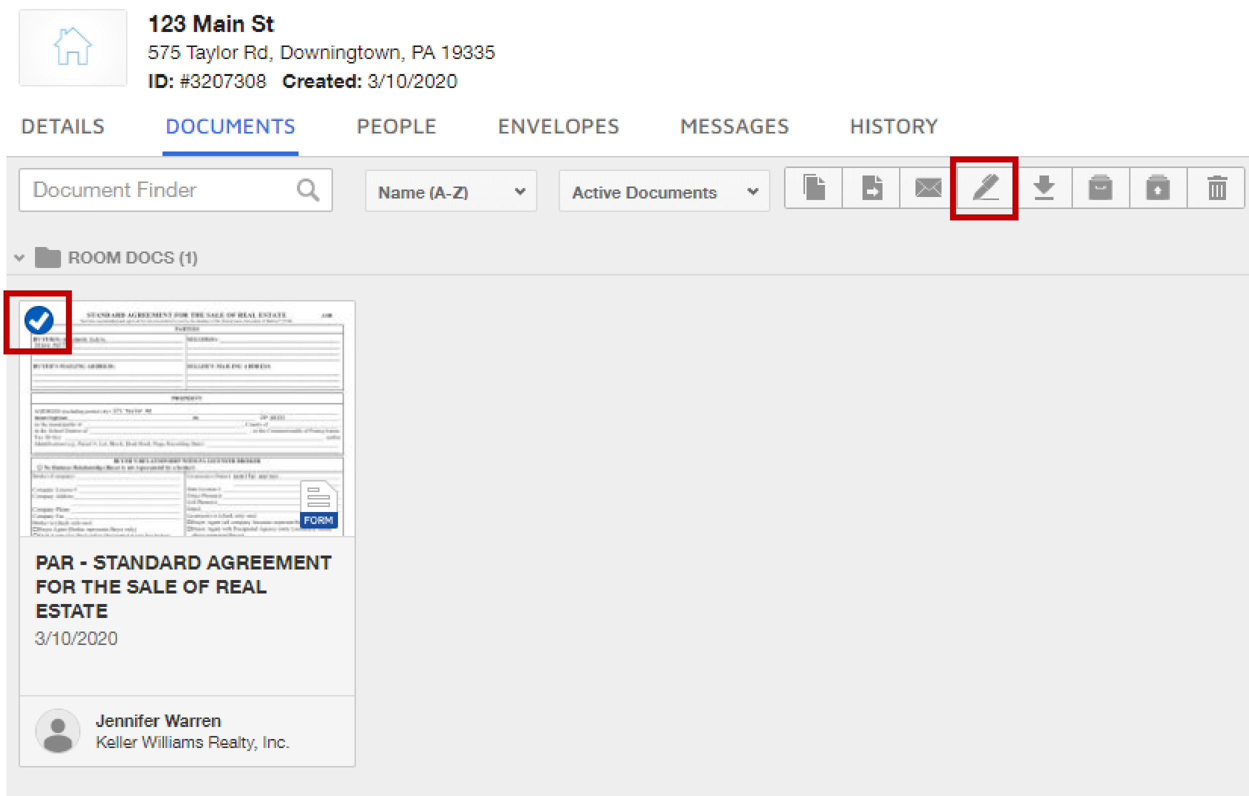
Choose the form(s) you need and click ADD



By clicking on the document, you can fill in details that you need to that didn't auto-populate. Once the details are filled in, hot SAVE AND CLOSE

SEND YOUR FORMS

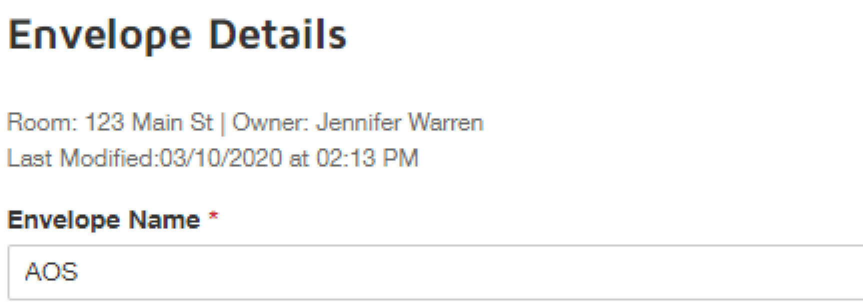
Choose the document you want to get ready for signature (by checking the little circle in upper left corner of document) and choose the PEN button (docusign) to prepare/fill forms.



Name your envelope.

Only you will see this – the client will NOT.

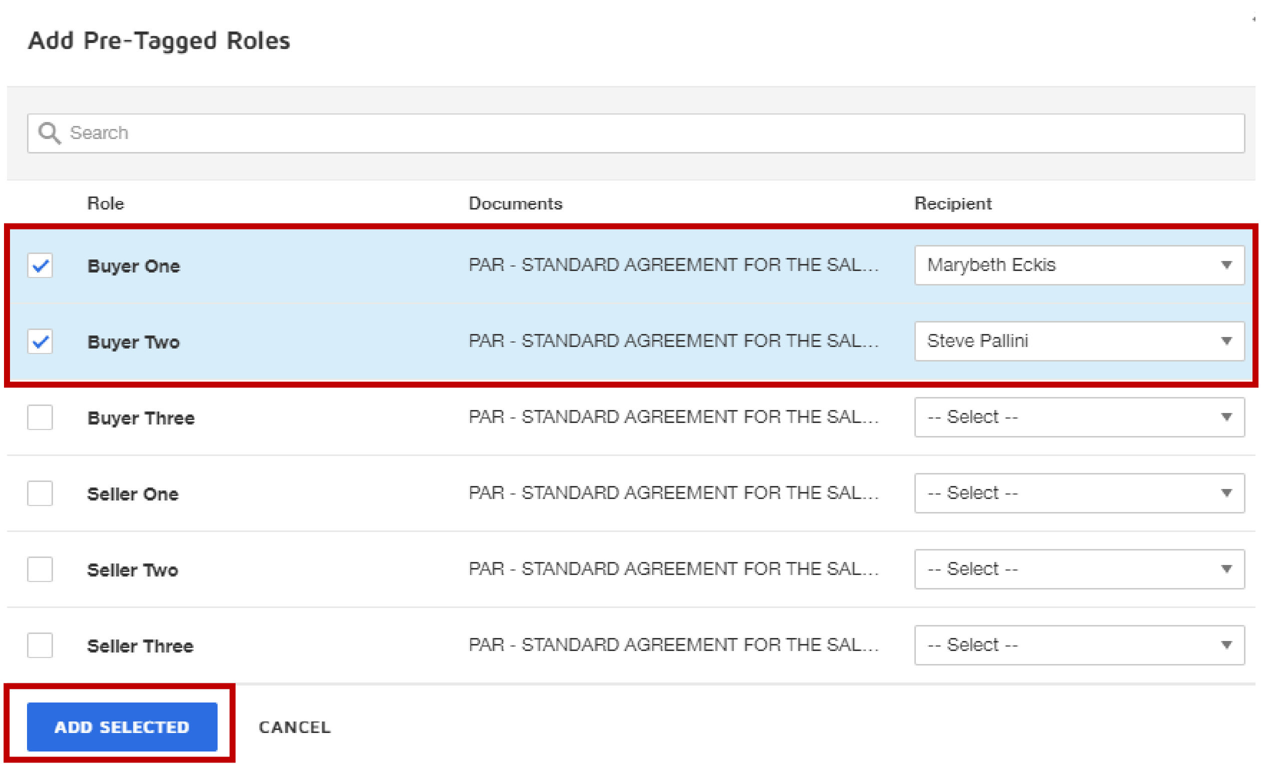
You might name it something relating to the forms within the envelope.



Add Recipients:

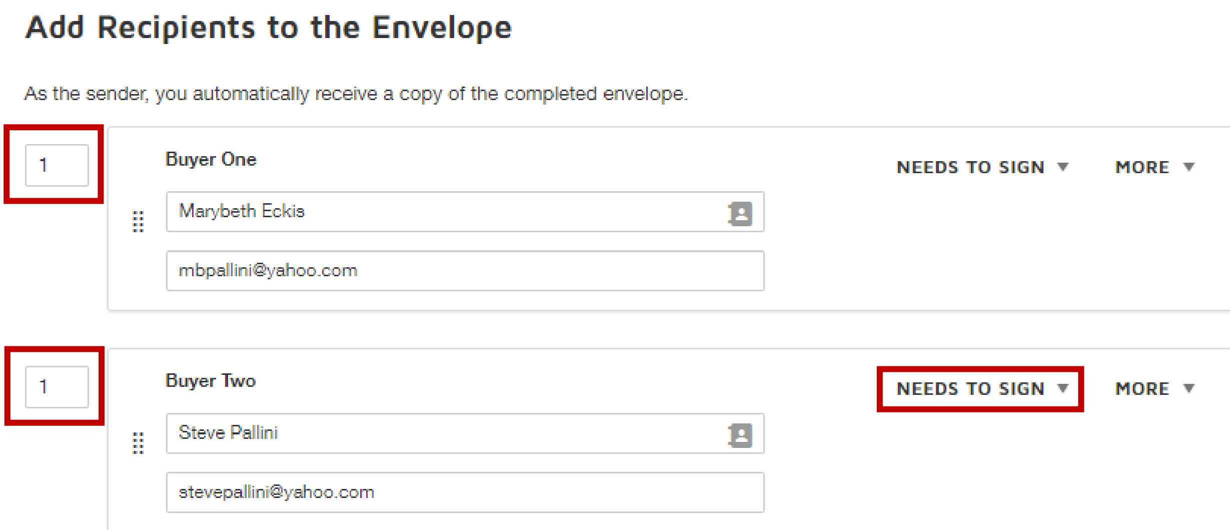
Use PRE-TAGGED ROLES for signature spots.

This should auto-populate from the details



Choose the recipients and click on ADD SELECTED

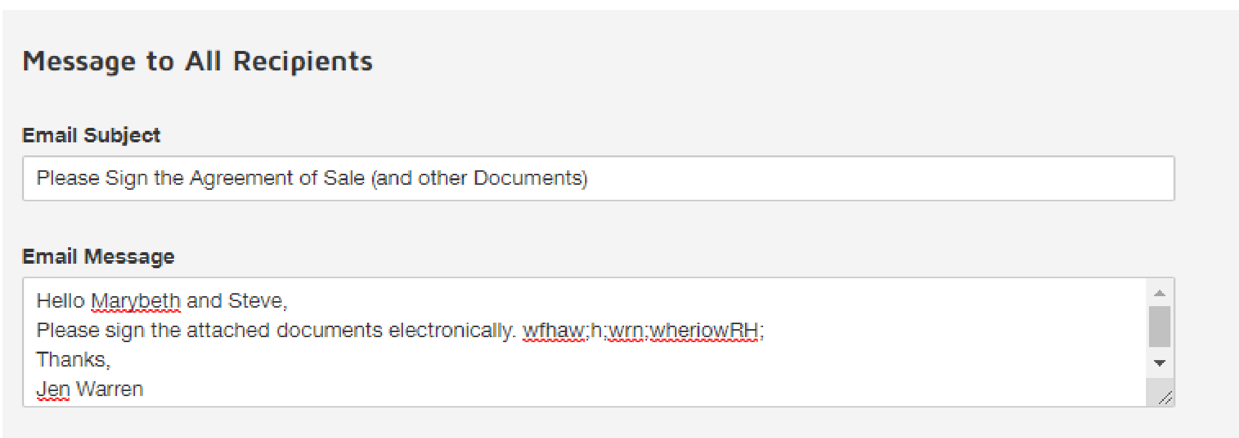
The recipients should populate:



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 have the chance to review the documents before they are sent out. If you need to add any information or add/delete and initial fields, you can do that in this step. Example in the Contingencies section of the AOS, one of the sets of initials needs to be deleted. Simply click on it and hit delete!

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