

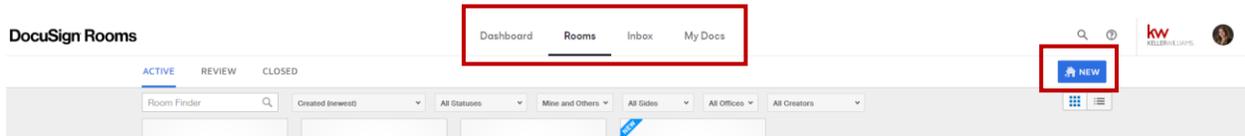
HOW TO USE DOCUSIGN ROOMS – Without using Templates

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



Room name *
123 Main St

Your role *
Agent Owner

Your side *
Buy Side

Location

Country *
United States

Photo

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 😊

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

DETAILS DOCUMENTS PEOPLE ENVELOPES MESSAGES HISTORY

EDIT ACTIONS

ROOM INFORMATION 1 Required to Close *

Name * 123 Main St	Side * Buy Side	Status Active
Created by Jennifer Warren on 03/10/2020 at 01:54 PM		

ROOM INFORMATION 2

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

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

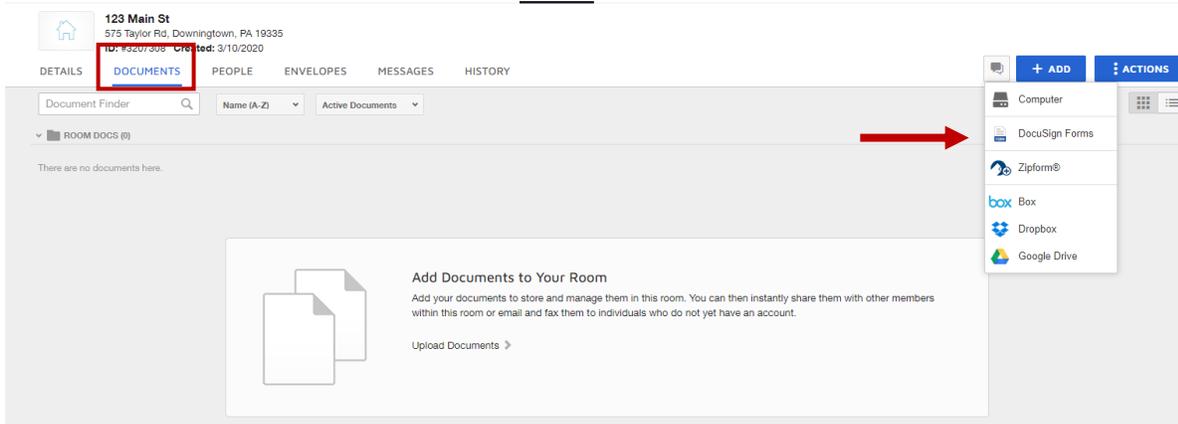
You can also add the property address I the location section

LOCATION Required to Close *

Address 1	Address 2	City
<input type="text"/>	<input type="text"/>	<input type="text"/>

SET UP YOUR DOCUMENTS

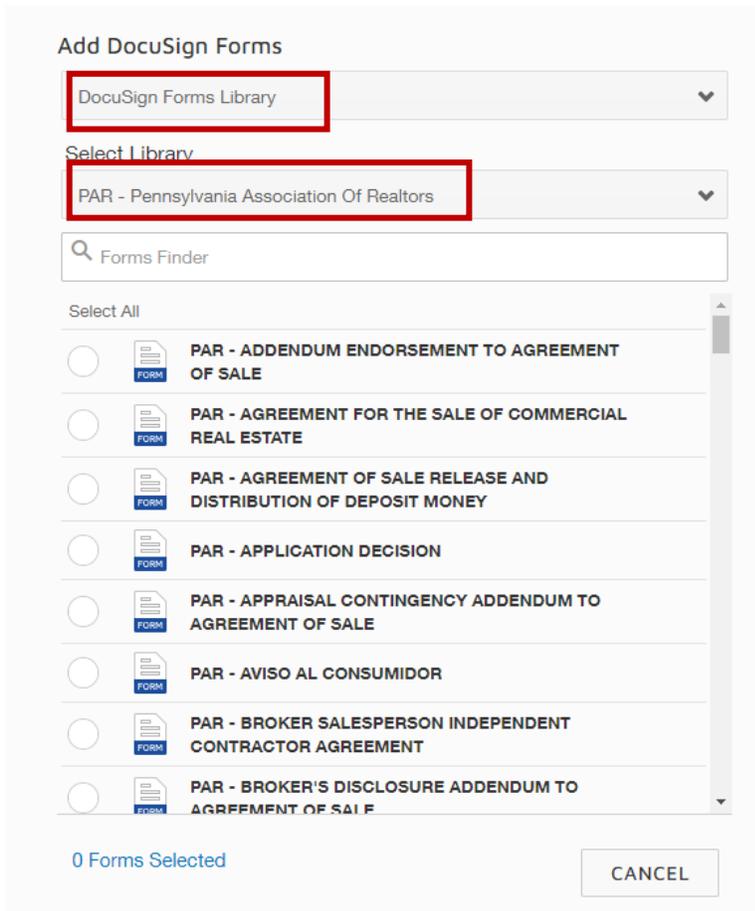
Without using a template, you can click on DOCUMENTS tab, click the blue ADD button and select DocuSign Forms



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.

The screenshot shows a document management interface. At the top, there is a header with a house icon, the address "123 Main St", "575 Taylor Rd, Downingtown, PA 19335", and "ID: #3207308 Created: 3/10/2020". Below this are navigation tabs: "DETAILS", "DOCUMENTS" (highlighted), "PEOPLE", "ENVELOPES", "MESSAGES", and "HISTORY". A "Document Finder" search bar is on the left, and a toolbar on the right contains icons for document actions, with the "PEN" icon highlighted by a red box. Below the toolbar, a folder "ROOM DOCS (1)" is expanded, showing a document card. The document card has a checked checkbox in the top left corner, highlighted by a red box. The document title is "PAR - STANDARD AGREEMENT FOR THE SALE OF REAL ESTATE" with a date of "3/10/2020". The sender is identified as "Jennifer Warren" from "Keller Williams Realty, Inc.". The document preview shows a form with various fields and a "FORM" label in the bottom right corner.

Name your envelope.

Only you will see this – the client will NOT.

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

Envelope Details

Room: 123 Main St | Owner: Jennifer Warren
Last Modified: 03/10/2020 at 02:13 PM

Envelope Name *

AOS

Add Recipients:

Use PRE-TAGGED ROLES for signature spots.

This should auto-populate from the details

Add Pre-Tagged Roles

Q Search

Role	Documents	Recipient
<input checked="" type="checkbox"/> Buyer One	PAR - STANDARD AGREEMENT FOR THE SAL...	Marybeth Eckis
<input checked="" type="checkbox"/> Buyer Two	PAR - STANDARD AGREEMENT FOR THE SAL...	Steve Pallini
<input type="checkbox"/> Buyer Three	PAR - STANDARD AGREEMENT FOR THE SAL...	-- Select --
<input type="checkbox"/> Seller One	PAR - STANDARD AGREEMENT FOR THE SAL...	-- Select --
<input type="checkbox"/> Seller Two	PAR - STANDARD AGREEMENT FOR THE SAL...	-- Select --
<input type="checkbox"/> Seller Three	PAR - STANDARD AGREEMENT FOR THE SAL...	-- Select --

ADD SELECTED CANCEL

Choose the recipients and click on ADD SELECTED

The recipients should populate:

Add Recipients to the Envelope

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

The screenshot shows two recipient entries. Each entry has a small box containing the number '1' on the left. The first entry is for 'Buyer One', Marybeth Eckis, with email mbpallini@yahoo.com. The second entry is for 'Buyer Two', Steve Pallini, with email stevepallini@yahoo.com. Both entries have a 'NEEDS TO SIGN' dropdown menu and a 'MORE' dropdown menu. The 'NEEDS TO SIGN' dropdown for Buyer Two is highlighted with a red box.

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:

The screenshot shows the 'Message to All Recipients' form. The 'Email Subject' field contains the text 'Please Sign the Agreement of Sale (and other Documents)'. The 'Email Message' field contains the following text: 'Hello Marybeth and Steve, Please sign the attached documents electronically. wfhaw:h:wrn;wheriowRH; Thanks, Jen Warren'. The message field has a scroll bar on the right side.

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!!