

Command

How to create an opportunity with Docusign and submit to office

*** Make sure your docusign account is connected!**

Log into command

click name in upper right corner

click settings

Look for docusign and connect using kw.com email.

*** You must have entered your client in as a contact in order to create an opportunity.**

*** If you are in PC you must move your contact to PC Account!**

Search contact name, click on white box and bulk action function appears, click on bulk action and click change account.

1. Login at agent.kw.com (or through mykw.kww.com under Technology tab)

Username and Password are the same as your Kw.com

2. Click on Opportunities



3. Click on Create Opportunity

Create Opportunity

- Market Center: auto fills to Bucks County South
- Team: will pull through if you are associated with a Team OR PC Program
- Opportunity Type: Choose Listing, Buyer, Landlord, Tenant
- Owner: auto fills to the Command Account Owner's name.
- Client: Name of client (must already be a contact)
- Co- Seller: Name of client if applicable (must already be a contact)
- Opportunity Name: Edit this to reflect the **Property Address**. (If you are entering client as an opportunity prior to having a property address you need to be sure to edit the name of the Opportunity prior to submitting to the office. Do this by clicking the pencil icon on General Information)
- Custom Tags: Utilize as desired
- Estimated Closing Date: Utilize as desired
- Commission Rate: Utilize as desired
- Opportunity Phase: Utilize as desired
- Opportunity Stage: Utilize as desired

Create Opportunity

4. Click Create Opportunity

*****TIP: This will bring you to a screen with Details for your opportunity. Here you can edit as much info as you desire.**

5. Click Documents Tab

Details

Documents

Offers

6. Click Pick A Checklist Type

Pick checklist type ▼

▼ Custom Folders

 Add new Custom Folder

***TIP: When you choose pick a checklist type BEFORE clicking start a transaction (next step) DocuSign will automatically pull in the forms you need to start your paperwork)

7. Access DocuSign by clicking

 Start a Transaction

Then

 Go To Transaction

whichever you are

prompted to do. (if you choose to continue Dotloop you will need to click the down arrow and click Dotloop)

***TIP: Once you choose to use DocuSign or Dotloop- that is the system you must complete the full opportunity in.

8. Login to DocuSign. This should be the email you used to associate your DocuSign account with Command, your kw.com email address.

***TIP: You may be prompted to choose a DocuSign Account- Choose Keller Williams Realty Account

***TIP: Once you login you will be automatically signed into DocuSign Rooms and to the Documents Tab.

9. Click on the Details Tab.

kw
KELLER

Rooms

DASHBOARD

ROOMS ¹

INBOX

MY DOCS

789 Command Road

ID: #2780022 Created: 10/24/2019

DETAILS

DOCUMENTS

PEOPLE

ENVELOPES

MESSAGES

HISTORY

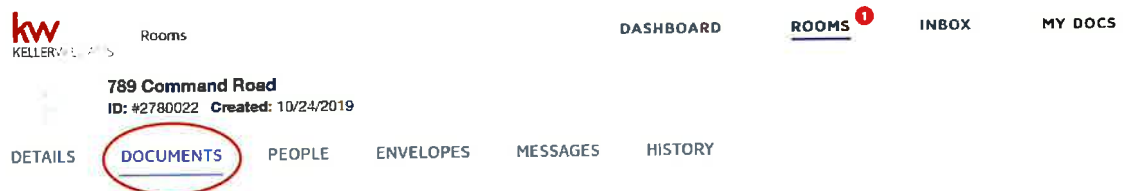


10. Click the Edit Button

- a. Here is where you can enter in all detailed information about your clients, property information, contract terms, agent information, etc. It will then auto populate into your Documents.

11. Click the Save button at the bottom right hand side.

12. Click the Documents Tab



***TIP: If you have clicked Pick A Checklist in command first, your forms will be pulled in. If you did NOT choose that first, then follow these steps.



13. Click the +Add Button

14. Find and click DocuSign Forms

***TIP: This will prompt for NRDS # if not already activated. Agents for PA choose PA Library. Agents that are PA and NJ choose PA Library to access both state forms.

Library: Which association of state forms you need

Group: Transaction in which you are creating (buyer side, seller side, seller side sale, etc)

15. Click the down arrow under Add DocuSign Forms and select DocuSign Forms Group

16. Click the down arrow under Select Group and select what group (transaction) you are creating.

17. Select what state forms (PAR) you need and click Add.

***TIP: If you open the document up, you will see the pre-populated Detailed information you first added. If you need to edit or add information you can open the document by clicking on it and it will open for editing. Once done, click Save and Close.

***TIP: Once you have all documents completed as needed you will move on into Envelopes to obtain signatures.

18. Select which documents you need to send out to you clients. You can do this by checking the small white box in the upper left corner of the icon document.

KW 476 - Conveyance Applicat...
11/11/2022



RULES HISTORY

eSignatures, powered by DocuSign, allows you to electronically sign documents that are part of your transaction. Select the documents in the Room that need to be signed and the people who need to sign them.

Create a new envelope ➤

20. Next you will need to select who you are sending the envelope to and then click continue.

Who are you sending this to?

Select recipient roles to automatically add their corresponding fields [signature, initial, etc.]

☐ Recipients ▲

☐ Buyer One

☐ Buyer Two

CONTINUE

Add Client names and email address to the Envelope

☒ Set signing order [View](#) [Import Bulk List](#)

1	2	Buyer One NEEDS TO SIGN CUSTOMIZE Name * Email *
Buyer Two NEEDS TO SIGN CUSTOMIZE Name * Email *		

- Choose signing order as desired
*****TIP: If you assign order as 1, 2, 3, this means the persons will not receive an email until after the person in front of them sign and complete.**
- You Can also choose to copy someone (Example: Lender, Title, Co-Op) after all signatures/initials are obtained so that they receive just a copy of the executed document.

Message to All Recipients

- **Email Subject:** Recommend you change to property address
- **Email Message:** Utilize as desired.

21. Click Next **NEXT**

- Begin to drop any additional tags, dates, signatures that are required on your forms.

22. Click Send **SEND**

*****TIP: On the left-hand side note the drop down that shows that different roles are assigned different colors. All they need to do is change the role and then they can drop tags under that role. Also note that as you change the roles and assign the fields that on the right-hand side the tabs showing a tag was dropped will be added. This way you can track if you missed anything. COLORED TAGS ARE FOR AGENTS ONLY!! ALL CONSUMERS TABS WILL BE YELLOW WENT SENT FOR EXECUTION!**

SUBMISSION THROUGH COMMAND

1. Click on Opportunities 

2. Select Opportunity

***TIP: You can either choose your Opportunity by click the All Opportunities tab OR you can choose you Opportunity based on the Phase it is sitting in.

AGENT'S NAME

All Opportunities

3. Click on the Offers Tab.

***TIP: You can utilize the Offers tab in a multiple offer situation. This will allow you to send an offer and net comparison sheet directly (if selected in Details section) to your seller with information on all offers received!!!

Details

Seller Profile

Documents

Offers & Commissions

Notes

Timeline

4. Click on Add New Offer

+ Add New Offer

a. Name your offer and then click

Create Offer

b. Enter in offer details and then click

Parties >

c. Enter in parties details and then click

Terms >

d. Enter in your term details and then click

Agent Analysis >

Example of Term Details on Next Page

Term Details Example:

Downpayment Amount in \$ of Purchase Price. (ex. 3.5% of \$200,000.00)

Amount of Mortgage

Offer Details

Parties

Terms

Agent An

Terms

Cash

Finance Amount

Sales Price

\$7,000.00

+

\$193,000.00

=

\$200,000.00

Price needs to be bigger than 0

Earnest Amount

Percentage

Earnest Amount

0

%

\$5,000.00

←

Total Good Faith Deposit/Earnest Money Deposit

Option Fee

Option Fee

Termination Option

Buyer will give notice of termination within

0

days after contract

←

Not required but ex: Home Inspection Contingency.

Seller Costs

Seller will contribute

to a residential service contract.

←

ex: Home Warranty

Seller will contribute

\$3,000.00

to settlement costs

←

Seller Assist in \$

e. Enter in your agent analysis, or skip

f. Click Save

g. Click Accept or Reject

Accept

Reject

***TIP: Click ⊕ Add New Offer if you are entering multiple offers

***TIP: Pros, Cons, & Summary WILL be including on the offer and net comparison sheet that goes to the seller!

***TIP: You can change the status of your offer by clicking

Change Response

5. Commissions

a. Click Manage Commission

Change Response

Manage Commission

b. Click Edit General Information to enter the Contract Date (Contract date is the last date listed on the agreement of sale) and click Save Changes

 Edit General Information

Contract Date*



Closed Date*

3/13/2022



←

March

→

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

Cancel

Save Changes

c. Click Add note and type in "PC Program" or any other payments that need to be taken out of your commission to be paid. Referrals, reimbursements for bold, PC program fee.

 Add Note

d. Click Submit to MC and ensure your status changes from OPEN to Submitted

Summary

● Open

Summary

● Submitted

Total Commission	\$12,500.00	Total Commission	\$12,500.00
Pay to Office	\$3,610.76	Pay to Office	\$3,610.76
Associate Royalty	\$0.00	Associate Royalty	\$0.00
Company Commission	\$3,510.76	Company Commission	\$3,510.76
Additional Deductions	\$100.00	Additional Deductions	\$100.00
Nonprofit Deductions	\$0.00	Nonprofit Deductions	\$0.00
Pay to Agents	\$8,889.24	Pay to Agents	\$8,889.24
Michelle Shillingford	\$8,889.24	Michelle Shillingford	\$8,889.24

Note:

PC Program

Edit

Remove

Note:

PC Program

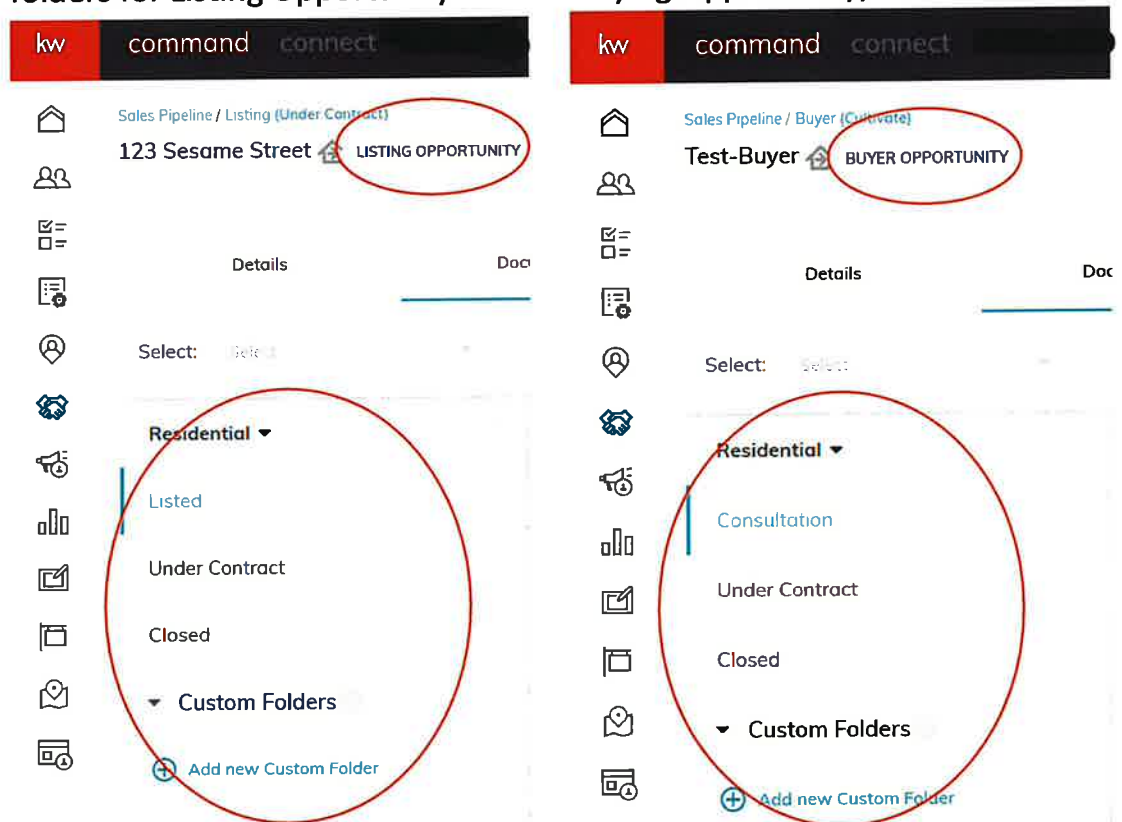
Submit

Request Termination

To Upload your required Documents (Listing Documents, Offer Documents, etc):

1. Go to Documents Tab

2. Click on which Folder you are uploading documents in to submit (different folders for Listing Opportunity and for Buying Opportunity)



***Note that the checklist is loaded and each file is to be uploaded individually per title of file.

3. Click on Add File 
4. Click on DocuSign Circle to use DocuSign to pull in file.
 - a. Search or scroll through specific file you need to upload
 - b. Click Assign

Assign Document

Select the document for Listing Contract or upload a new document.

Remember, that you can upload or assign just one document.

Source of documents

Manual ☐ DocuSign ☒

Documents

Search for specific document...

☒ Certification - Please DocuSign.pdf

Conveyance Application-Green Sheet Part 2_Rev 5.19 [2] - Signed.pdf

PAR - CONSUMER NOTICE - CN - Signed.pdf

PAR - CONSUMER NOTICE - CN.pdf

Cancel Assign

****Once loaded this is what your screen will look like

STATUS ▼	DOCUMENT ▼	TYPE ▼	FILE
☒ Uploaded	Listing Contract Required	Contract	listing-contract.pdf

5. After you have finished uploading all files that you are ready to Submit you

will then click on the Submit to MC button.

Submit to MC

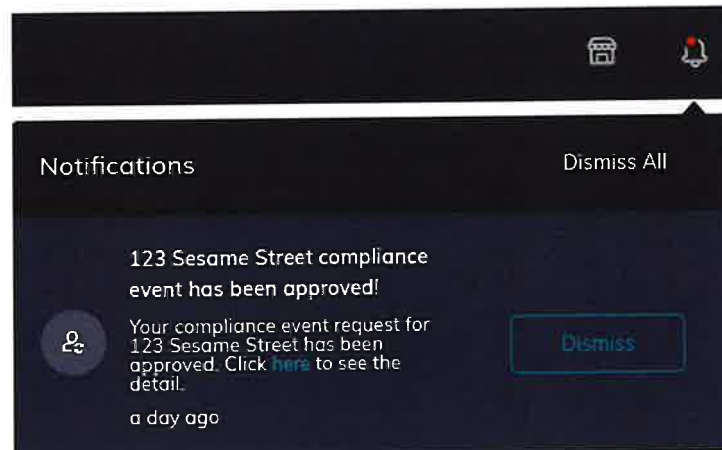
***TIP: If a document is labeled required and it does not apply to your transaction, you can click “add comment” and leave a note in your file for compliance. To send note to a specific person use the @ to search name.



File Submission Tab Changes

**** Pay Attention to the  at the top of your profile for updated notifications of your submissions! The Bell will have a RED dot on it.**
(notification available)  VS.  (no notification available)

**** Right now notifications also go to KELLE App- but there are currently NO ALERTS for notifications!**



Residential ▼

Listed • **Open**

Under Contract

Closed

▼ Custom Folders

 Add new Custom Folder

**** Once you have uploaded a document for review the status of your folder will say **OPEN**. * will receive notification at bell.**

Select:

Residential

Listed • **Submitted**

Under Contract

Closed

▼ Custom Folders

 Add new Custom Folder

Listed ▼

✓ 1 of 9 documents uploaded  Add item

STATUS ▼

🕒 Uploaded

⊗ Not uploaded

DOCUMENT ▼

Listing Contract
Required

Lead Based Paint Disclosure
Required

TYPE ▼

Contract

Disclosure

 Go To Transaction

Status: Submitted

Submitted 10/28/19 at 11:20 am

Submitted

listing-contract.pdf

 Add a file

**** Once you have submitted a document for review the status of your folder will say **Submitted**. * will receive notification at bell.**

Residential Listed ▾ Status: Submitted Submitted

Listed • Submitted 1 of 9 documents uploaded Add item Submitted 10/28/19 at 11:41am

	STATUS ▾	DOCUMENT ▾	TYPE ▾	FILE
Under Contract	Rejected	Listing Contract Rejected	Contract	listing-contract.pdf
Closed				

**** Example of a rejected file – Hover over the  for notes of reason. * will receive notification at bell.**

Residential Listed ▾ Status: Returned Submitted

Listed • Returned 9 of 9 documents uploaded Add item Returned 10/28/19 at 12:09pm

	STATUS ▾	DOCUMENT ▾	TYPE ▾	FILE
Under Contract	Rejected	Listing Contract Rejected	Contract	listing-contract-corrected.pdf
Closed	Approved	Lead Based Paint Disclosure Approved	Disclosure	listing-contract-corrected.pdf

Custom Folders Add new Custom Folder

Replace Version history Print

**** Hover over the 3 dots  and click replace to replace with the corrected file. * will receive notification at bell. Be sure you are replacing the CORRECTED form!**

Returned

Residential Listed ▾ Status: Changed Resubmit to MC

Listed • Changed 1 of 9 documents uploaded Add item Changed 10/28/19 at 11:17am

	STATUS ▾	DOCUMENT ▾	TYPE ▾	FILE
Under Contract	Replaced	Listing Contract Replaced	Contract	listing-contract-corrected.pdf
Closed				

Custom Folders

**** Example of what your screen will look like once you've replaced a file. * will receive notification at bell. YOU ALSO MUST CLICK  to RESUBMIT TO OFFICE!**

Residential

Listed

Changed

Listed

1 of 9 documents uploaded

Add item

Status: Changed

Changed 10/28/19 at 11:47am

Resubmit to MC

	STATUS	DOCUMENT	TYPE	FILE
Closed	Approved	Listing Contract	Contract	listing-contract-corrected.pdf

**** Example of what your screen will look like once your file was approved. * will receive notification at bell.**

Residential

Listed

Resubmitted

Listed

9 of 9 documents uploaded

Add item

Status: Resubmitted

Resubmitted 10/28/19 at 11:51am

Resubmitted

	STATUS	DOCUMENT	TYPE	FILE
Closed	Approved	Listing Contract	Contract	listing-contract-corrected.pdf

**** Example of what your screen will look like once your FOLDER was submitted. * will receive notification at bell.**

COMMAND CHECKLIST

Introduction to Command

☐ SIGN IN

- Go to: agent.kw.com
- Sign in using your KW.com user name and password

☐ SET UP MARKETING PROFILE

- Click your name at top right
- Click "Settings"
- On left hand side, click on "Marketing Profile"
- Complete empty fields
- Click on "Save"

•

☐ CONNECT G-MAIL ACCOUNT

- Click your name at top right
- Click "Settings"
- On left hand side, click on "Applications"
- Find Gmail on list, click on "Connect Account"
- Select the account you wish to connect to Keller Cloud (sign into your Gmail acct)

☐ Connect Docusign

- Click your name at top right
- Click "Settings"
- Find Docusign, Send registration Email or Activate

☐ MANUALLY ADD CONTACTS

- Click on "Contacts" in left side menu bar
- Click "+ Add Contact" button at top right
- Fill in details about new contact
- Click on "Create" button at bottom of page

☐ CREATE NEIGHBORHOOD SNAP

- Click on "Contacts" in left side menu bar
- Select (click on) a contact
- Scroll down to "Neighborhoods"
- Click "Add Neighborhood"
- Click on "View Map"
- Search for a Neighborhood using map search tool
- Select desired Neighborhoods by clicking on map area
- Click on "Save"
- Click on "Get Neighborhood Snap URL"

☐ EXPLORE CONNECT GROUPS

- Click on "Connect" at top left
- Click on "Union County" from your groups list
- Answer the poll question about what you think of Command!
- Write a new post to share with everyone in our market center!