Command

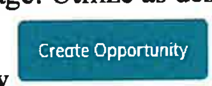
How to create an opportunity with Docusign and submit to office

*** 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

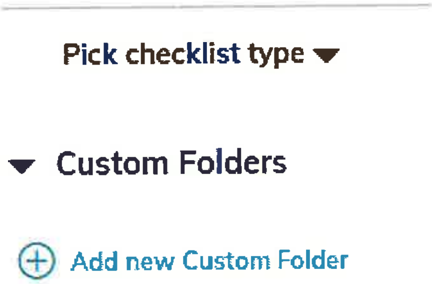
2. **Click on Opportunities** 
3. **Click on Create Opportunity** 

   - 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
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**

6. **Click Pick A Checklist Type**



*****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)**

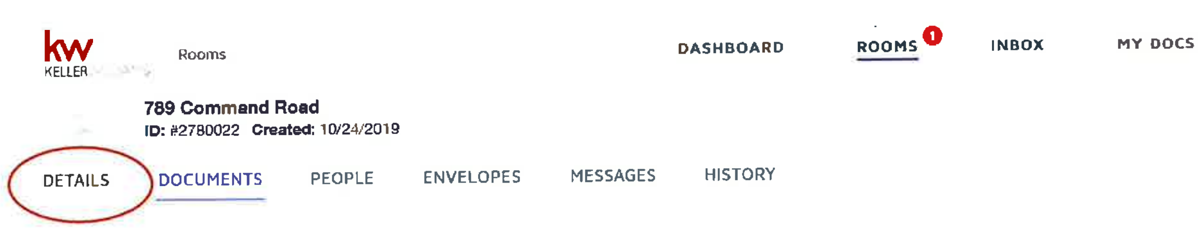
7. Access DocuSign by clicking Start a Transaction Then Go To Transaction whichever you are prompted to do. (if you choose to continue Dotloop you will need to click the down arrow and click Dotloop)
   *****TIP: Once you choose to use DocuSign or Dotloop- that is the system you must complete the full 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.**

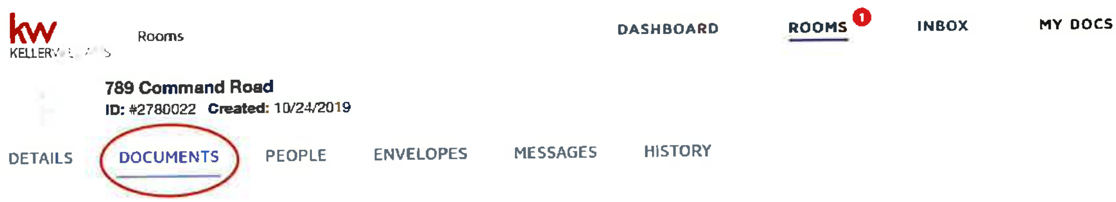


10. **Click the Edit Button** 

   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**

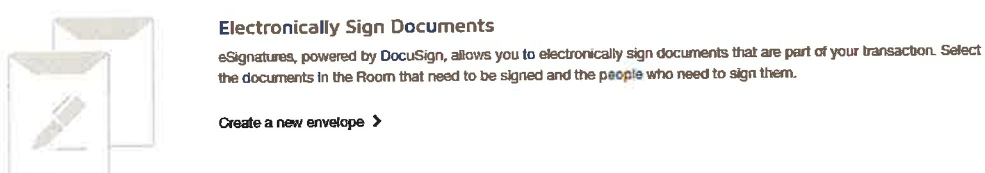
16. **Click** the down arrow under Select Group and select what group (transaction) you are creating.

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.**

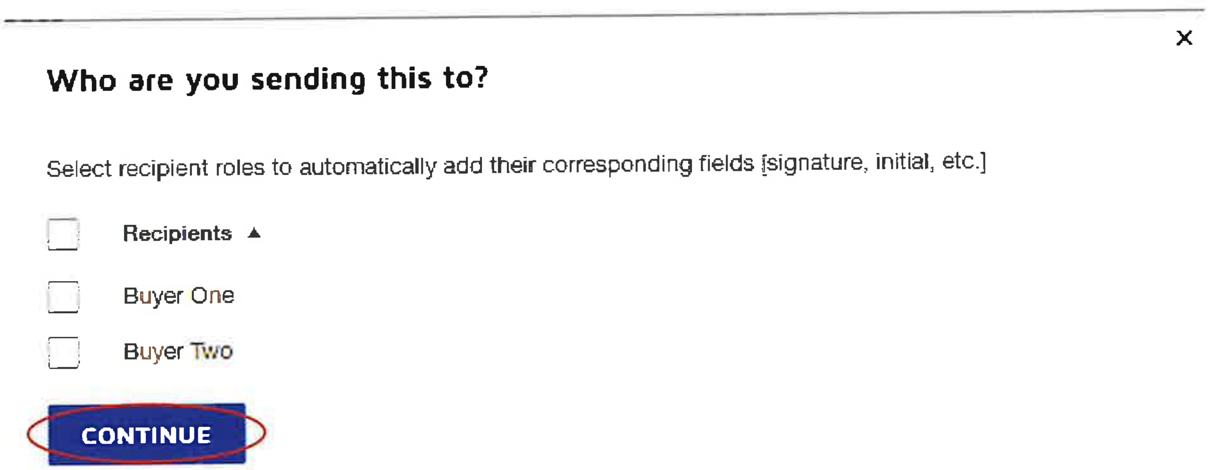
18. **Select which documents you need to send out to you clients. You can do this by checking the small white box in the upper left corner of the icon document.**

19. **Once you have selected all your documents click on the Pen Icon.**

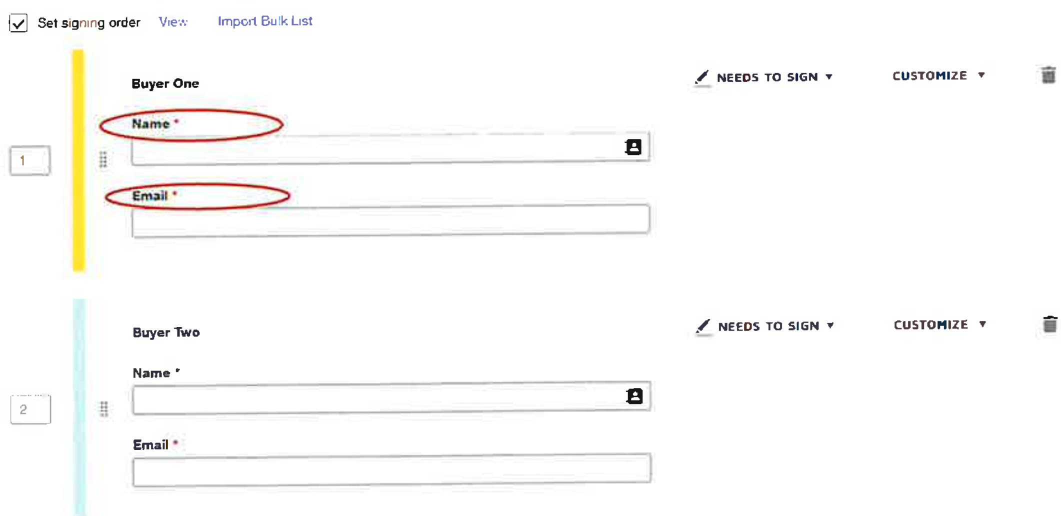


*****TIP: You must select at least one document for the above pictured toolbar to show.**

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



Add Client names and email address to the Envelope



- 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!**

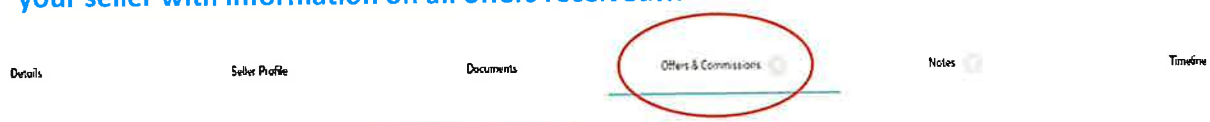
SUBMISSION THROUGH COMMAND

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.

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!!!



4. **Click on Add New Offer** Add New Offer

   a. **Name your offer and then click** Create Offer

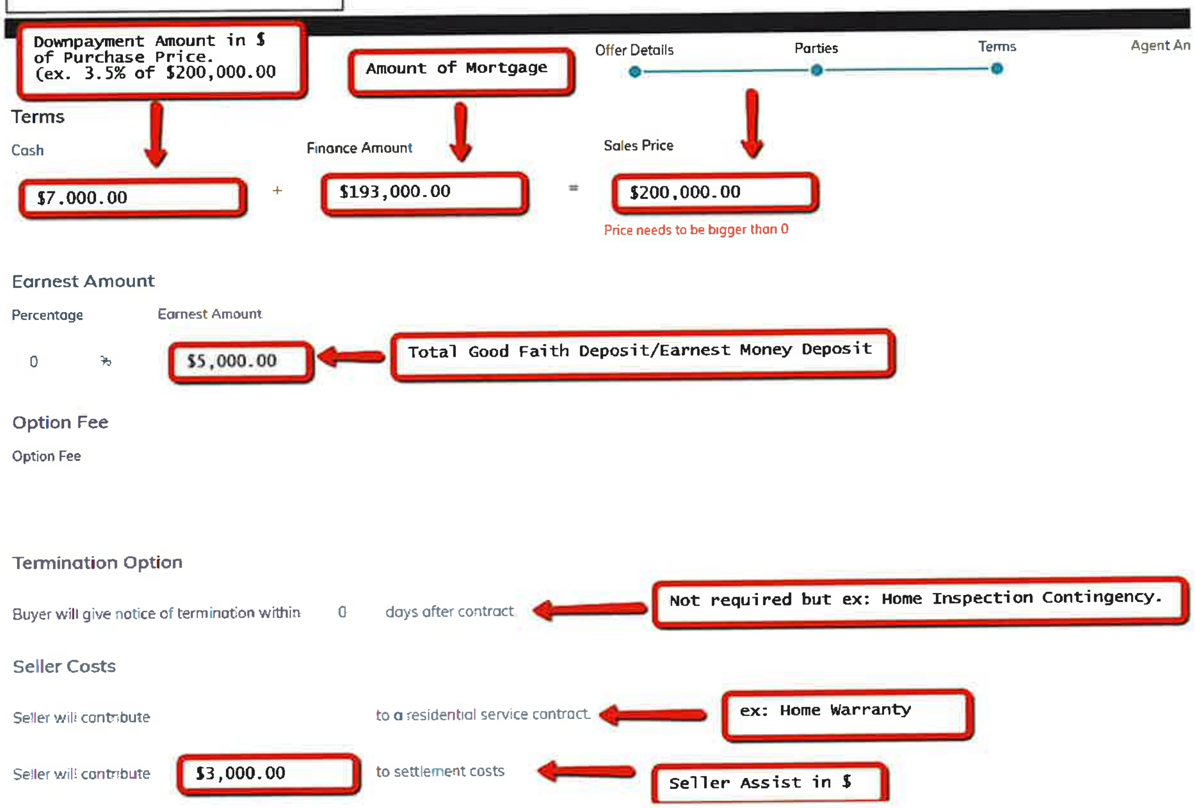
   b. **Enter in offer details and then click** Parties >

   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:



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

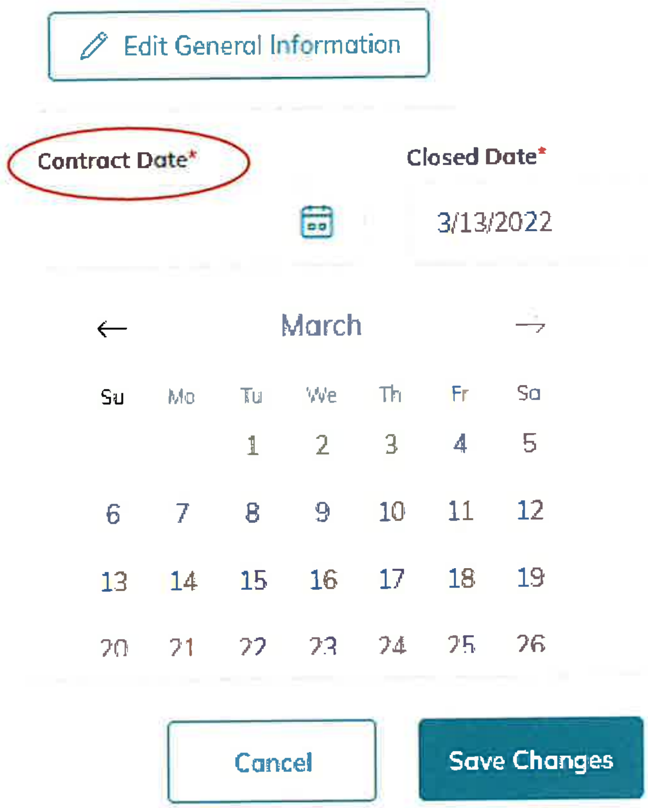
***TIP: Pros, Cons, & Summary WILL be including on the offer and net comparison sheet that goes to the seller!

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

5. **Commissions**

a. Click Manage Commission

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



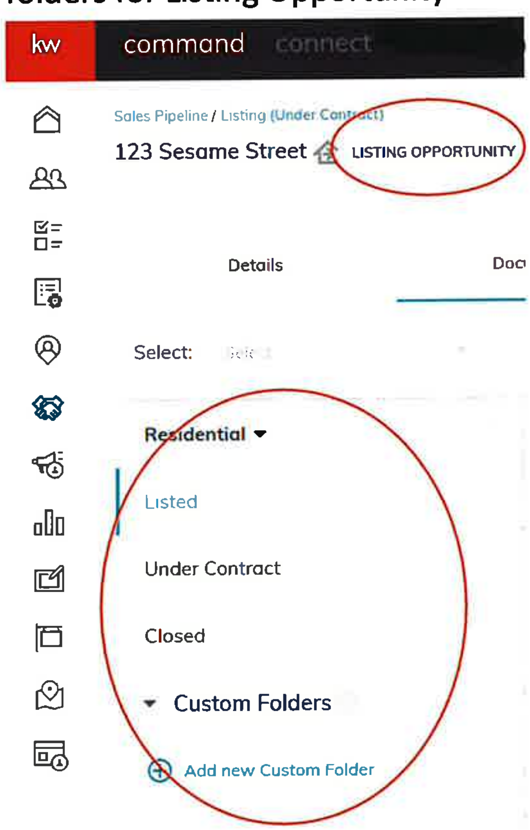
c. Click Add note and type in "PC Program" or any other payments that need to be taken out of your commission to be paid. Referrals, reimbursements for bold, PC program fee.

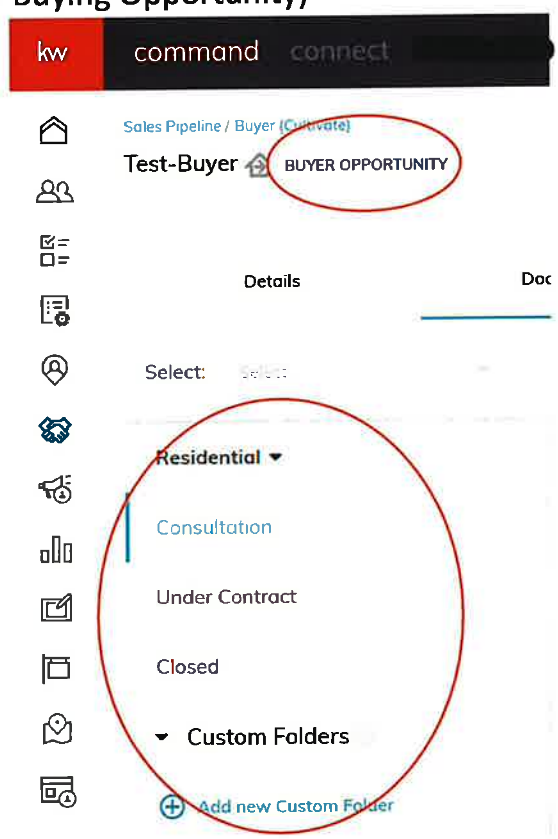
d. Click Submit to MC and ensure your status changes from OPEN to Submitted

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)

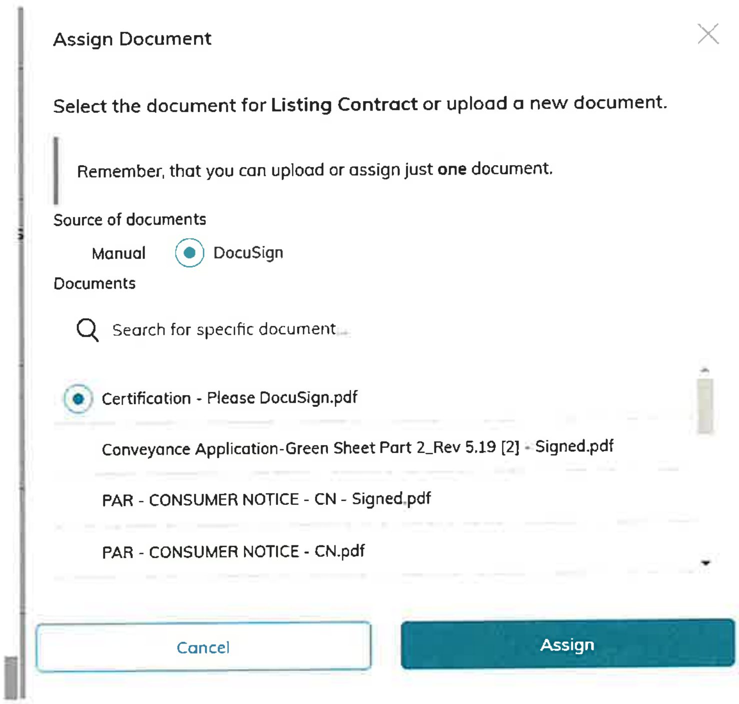




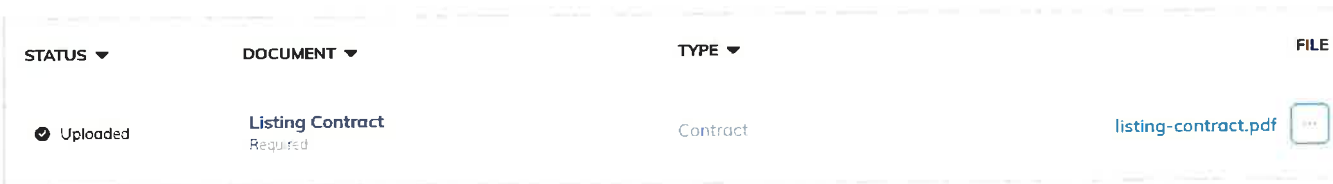
***Note that the checklist is loaded and each file is to be uploaded individually per title of file.**

3. Click on Add File 

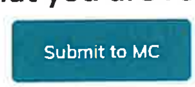
4. Click on DocuSign Circle to use DocuSign to pull in file.
   a. Search or scroll through specific file you need to upload
   b. Click Assign



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



5. After you have finished uploading all files that you are ready to Submit you will then click on the Submit to MC button.



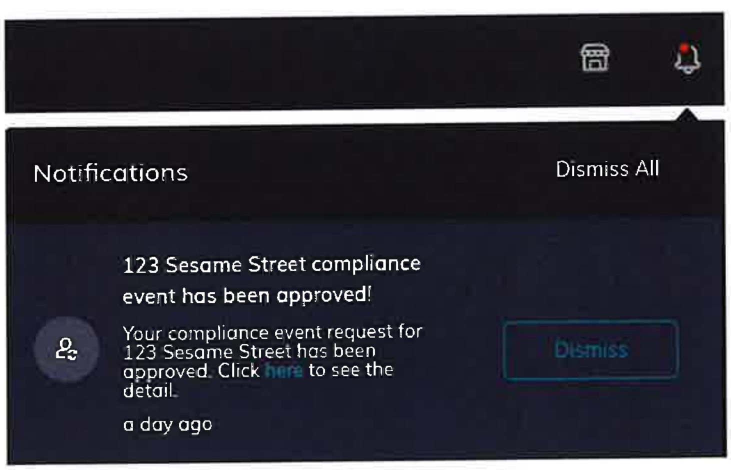
***TIP: If a document is labeled required and it does not apply to your transaction, you can click "add comment" and leave a note in your file for compliance. To send note to a specific person use the @ to search name.

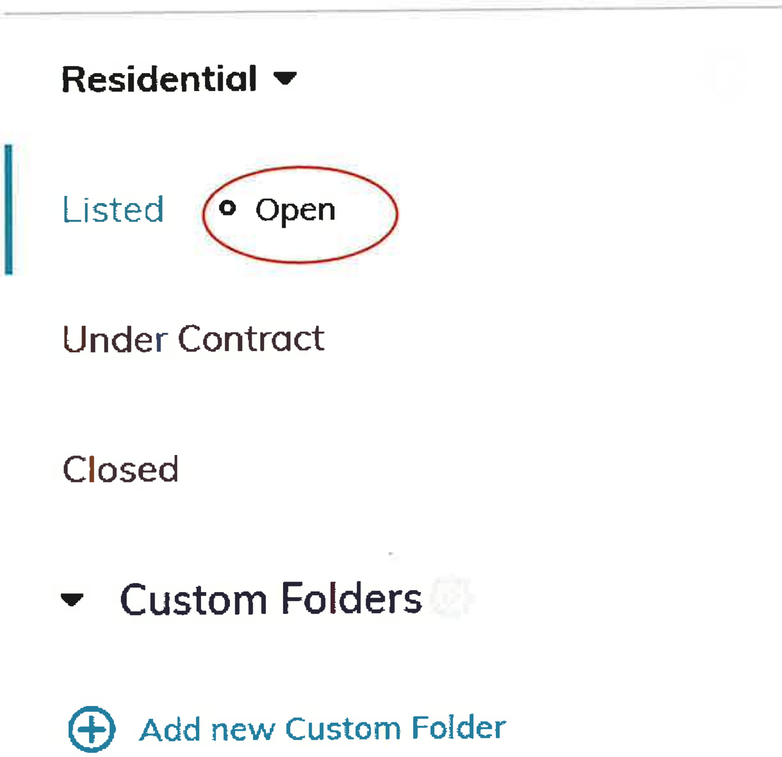
File Submission Tab Changes

** **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.**

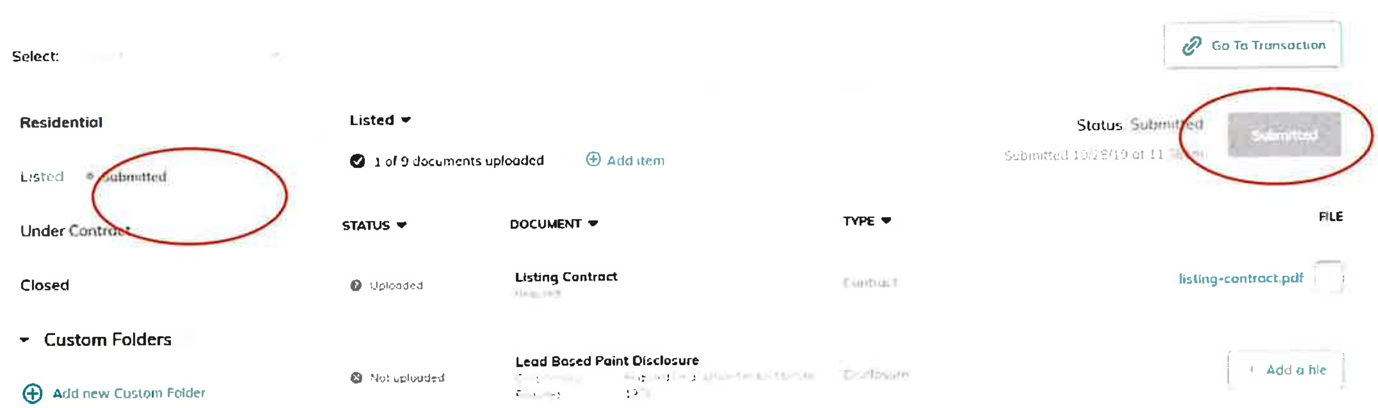
(notification available)  **VS.**  **(no notification available)**

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

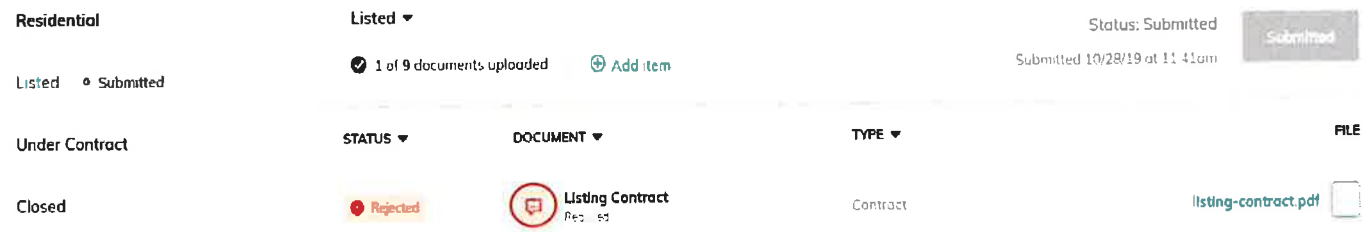




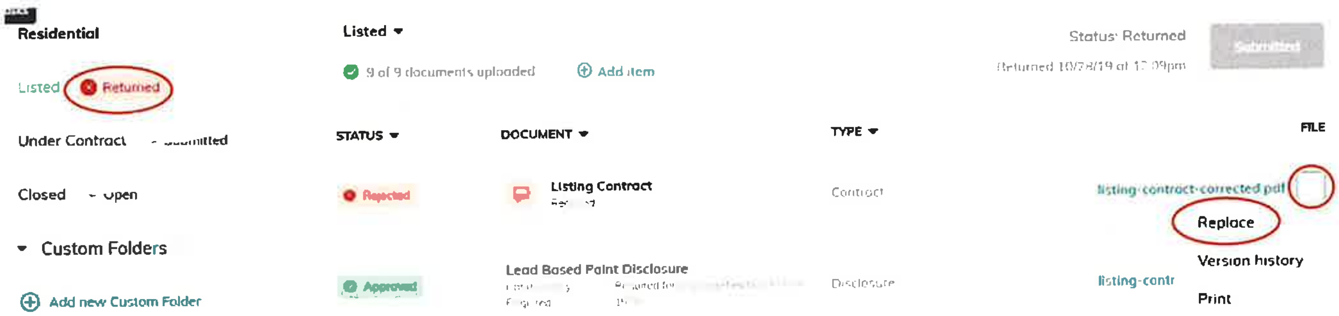
** Once you have uploaded a document for review the status of your folder will say **OPEN. * will receive notification at bell.**



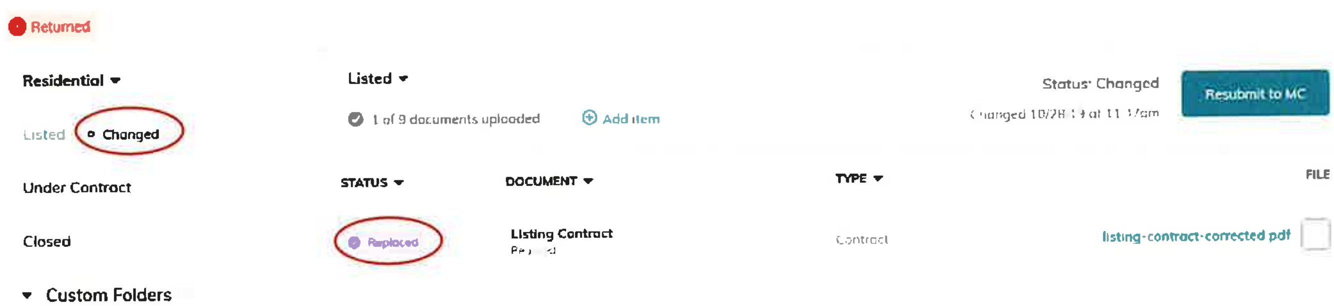
** Once you have submitted a document for review the status of your folder will say **Submitted. * will receive notification at bell.**



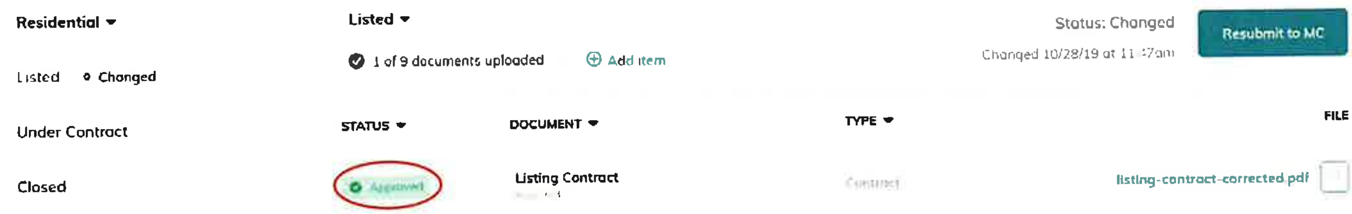
** Example of a rejected file – Hover over the for notes of reason. * **will receive notification at bell.**



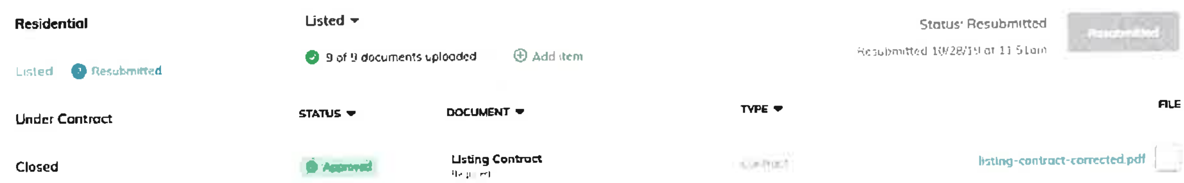
** Hover over the 3 dots and click replace to replace with the corrected file. * **will receive notification at bell. Be sure you are replacing the CORRECTED form!**



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



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



** 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!