YOUR GUIDE TO COMMAND AND DOCUSIGN ROOMS

1. Start in Command - go to agent.kw.com and login
2. Go to Opportunities on the left (handshake icon)
3. If this is a new transaction/opportunity, click Create Opportunity (blue button) on the top right.
4. Complete the pop-up form. Indicate the Opportunity Type in the dropdown box (choose from Listing, Buyer, Landlord, Tenant). Use the Client box to start typing in your client's name - choose from the dropdown or choose Create New Contact to add someone in. Put in your Estimated List Price or Budget and your commission rate. Indicate the Opportunity Phase and then Stage. Hit Create.
5. Click on DOCUMENTS, this is your stepping stone to get to DocuSign Rooms.
6. Click on START A TRANSACTION. This will start a DocuSign Transaction Room for you in a new tab.
7. Login to DocuSign. Make sure to use your KW email, this is what the account was created under (unless it was specifically created with a different email!).
8. In DocuSign, click on DOCUMENTS then ADD to add new blank forms into your room.
9. In the pop-up, choose from the handy folders on the left called GROUPS. Choose the one that is relevant for your transaction - we have pre-made folders for listings, buyers, landlords, and tenants. Make sure you CLICK on the folder you want.
10. Check off the forms on the right that you want to put in your room. Then hit Add Selected.
11. Click on the title of each form to open it up for editing. Fill in the appropriate boxes and checkboxes, then hit Save & Close. Do not worry about signatures yet, this comes later. Follow this process for each document you need to edit before preparing to print or send.
12. TO PRINT (if needed)- Refresh the page after you've saved each document you need. Right click the document you need to print and choose Print from the dropdown options.
    SENDING A DOCUMENT FOR SIGNATURES
13. Check off the checkbox next to each document you'd like to send in a packet for eSignatures. Click the Pen icon at the top that says Create Envelope.
14. Check off each participant that you need to sign these documents in the pop-up. DO NOT worry about extra people or people who are not on your side of the transaction - ONLY FOCUS ON YOUR PEOPLE and check them off.
15. Make sure your client's email addresses are showing under their name under the Add Recipients section. Write your email message at the bottom of the page. Hit NEXT.
16. Check each page to ensure signature boxes are where they are supposed to be. Utilize the dropdown at the top left that shows your client's name as your key and to change how you're interacting with the page. Use the guide on the left to add new signature/initial boxes if needed. Drag and drop what you need on the page.
17. Hit SEND to send to all of your recipients to sign. You will only receive signed documents back when ALL documents have been completed.