Step By Step Document Preparation Instructions

Use for creating Buyer Agency, Writing an Offer or Preparing Listing Documents

1. Create Contacts(s) in Command

Include as much information as possible. Email address, home address, phone numbers. If there are co-buyers, link them in the "About" section at the bottom of the contact

2. Create an Opportunity

Within the contact card on the right side, click on the "Opportunities Tab". Click on "Create Opportunity" Fill out the required information and click "Create". Click on the created Opportunity. The Opportunity section will open. Click on the Documents Tab. on the left side click on the "Pick Checklist type" Three new dropdowns will appear

3. Create Documents in Docusign

Click on "Sync with DocuSign on the upper right side. Docusign should open. In the upper right corner, click "Add".

For Buyers Agency, add the following from KW Realty - Sale

- Consumer Notice
- Exclusive Buyer Agency Contract
- Bright MLS Sellers and Landlords MLS Disclosure
- Wire Fraud Disclosure
- Consumers Guide to the Agreement of Sale

For Writing an Offer, add the following from KW Realty - Sale

- Standard Agreement of Sale
- Buyers Estimated Costs
- Deposit Money Notice
- Appraisal Contingency Addendum
- Escalation Addendum (optional)
- Cooperating Broker Compensation Agreement (if applicable)
- Lead Paid Brochure (from the PAR Menu)
- Buyers Estimated Costs (this can be uploaded from the lender if financing)
- You will need a pre-approval or proof of funds to submit with your officer, but you don't need to upload them into DocuSign.

Upload the following:

- Sellers Property Disclosure AKA SPD (from the MLS listing)
- Lead Paint Disclosure AKA LPD (from the MLS listing)
- Any other relevant documents available on the MLS listing

For a Listing, add the following from KW Realty - Listing

- Consumer Notice
- Listing Contract
- BrightMLS Sellers and Landlords MLS Disclosure
- Wire Fraud Disclosure
- Sellers Estimated Costs
- Sellers Property Disclosure Statement
- Lead Paint Disclosure (if home was built before 1978)

4. Complete Documents & Create Envelope for Initials and Signature

- Complete all required information in documents. Save and Close.
- **STOP: The PC Coach Must Review Documents before they are signed by your clients.**
- Select the checkbox next to each of the documents that needs to be signed.
- Select the icon that looks like a pen at the top of the menu, a window should pop up asking who needs to sign, select the appropriate signers, don't forget yourself! Click ok.
- Enter email addresses and names of parties that need to sign, click Next at the bottom
- Make sure that all fields that require signatures, initials and dates have the signature initial and date fields, with the appropriate signer selected. Any uploaded documents require these fields to be inserted manually.
- Send for signatures!
- Once you have all documents signed or a RATIFIED Agreement of Sale Package, attach or upload them into the Command Opportunity by either selecting in the Command Opportunity dropdown box “Attach files from:”....either Docusign or My Computer.
- Double check that the required documents are complete and uploaded property and click the button, “Submit to MC”. These documents will be reviewed by our Compliance Specialist and either approved or returned for correction.
- Order Transaction Coordinator Services from ExploreKW.com - Agent Services
- **CONGRATULATIONS!!!**