

Your Walk- Through Guide to Setting Up DocuSign, Opportunities, Preparing Documents, Obtaining Signature, Compliance, and Commissions in Command.

Dotloop Transition Notes

DocuSign Profile Set Up

Setting Up your NRDS ID

Starting a Transaction

Once in DocuSign

Once Under Contract

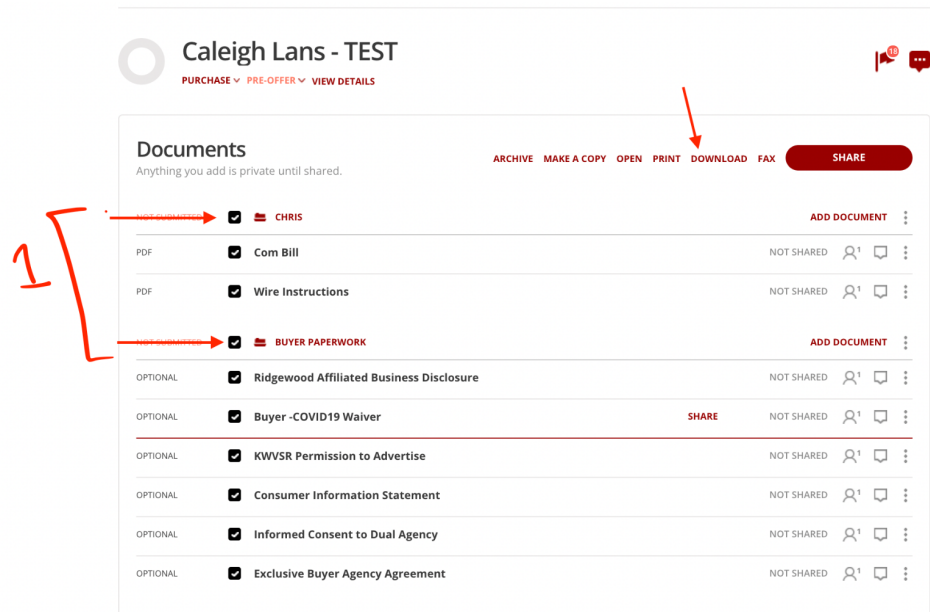
Commissions in Command (Getting Paid)

Additional Things to Note

4 Most Important Steps When Doing a Transaction in Command

Dotloop Transition Notes

- Any loops that your transactions are not closing till 2022 Lynn has given the okay for you to export as 1 full pdf to upload to command instead of individually. See below a quick video on how to do that
- You will have access to all your old loops through dotloop as a FILE CABINET so your login will stay the same but you will not have access to create new loops or access to KW Templates. We will also have all loops on our secure server at the office for legal purposes and if you need us to print out any or reshare with you through there we can.
- To Export Full PDF Docs from Dotloop to Command



-
- Once you have the downloaded PDF you can add all the documents to Your opportunity as ONE document

Details Seller Profile **Documents** Offers & Commissions 0 Notes 0 Timeline

Status: Select... Status: Open [Submit to MC](#) [Go To Transaction](#)

Residential **Listed** 3 of 13 documents uploaded [Add comment](#) Attach Files From: DocuSign Working Folder: [...](#)

Under Contract [Open](#) Include DocuSign Forms Show Archived [Add Document](#) [Export Documents](#)

Closed

Custom Folders [Add new Custom Folder](#)

STATUS	REQUIREMENT	DOCUMENT	TYPE
● Uploaded	Required	DS Residential Listing Agreement	Agreement
● Uploaded	Required	DS Informed Consent to Dual Agency	Disclosure
● Not uploaded	Required	DS Consumer Information Statement	Disclosure

Add item

FULL LISTING DOCUMENTS

Document type*
Other

Additional note

Source of Documents*
 DocuSign
 My Computer (Manual)
 DocuSign
 Custom Folders

[Cancel](#) [Save](#)

Message Lynn when you go to submit for compliance and say the following:

Status: Select... [Submit to MC](#) [Go To Transaction](#)

Residential **Under Contract** 0 of 4 documents uploaded [Add comment](#) Attach Files From: DocuSign Working Folder: [...](#)

Listed [Open](#)

Under Contract

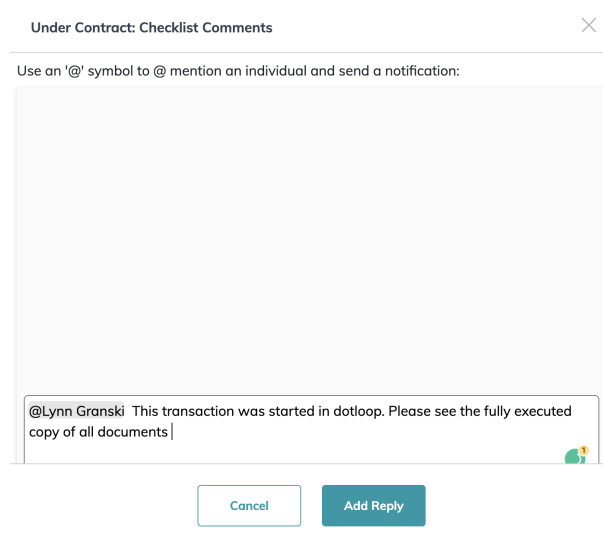
Closed

Custom Folders [Add new Custom Folder](#)

STATUS	REQUIREMENT	DOCUMENT	TYPE	FILE
● Not uploaded	Required	DS Fully Executed Contract	Contract	Select...
● Not uploaded	Conditional	Fully Executed Lead Paint Disclosure	Disclosure	Select...
● Not uploaded	Conditional	Fully Executed Seller's Disclosure Agreement	Disclosure	Select...

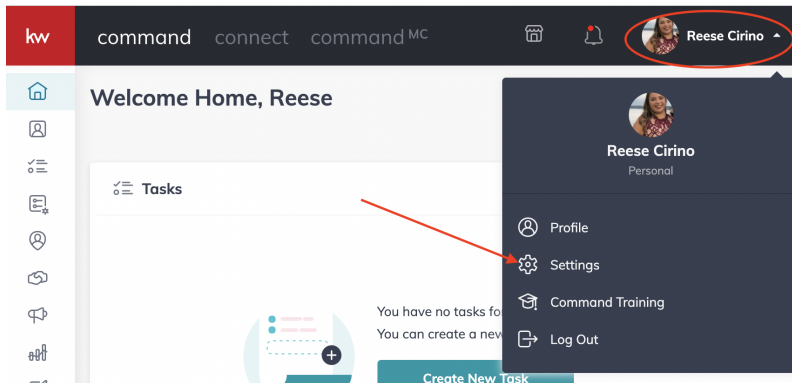
Attorney Correspondence 0

.../command/opportunities/documents?contactId=6127d7b5e8b464001d168796&id=5172899&teamId=#/checklistType/35661/parentEvent/98527/eventVersion/98527



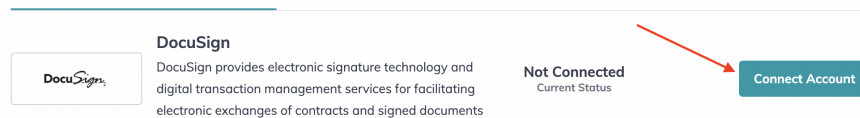
DocuSign Profile Set Up

- ❑ Go into settings in command



- ❑ Click connect account next to docuSign

Digital Signature & Transactions



- ❑ **Option 1 : (if you received a password) Sign In with the email given to you in Scott Leroy Password Sheet**

DocuSign Email ✕

Please input the email address associated with your existing DocuSign account.

Preferred Email

Don't have account yet? [Create one here](#)

Log in to DocuSign

DocuSign Username/Email: testagnet@kw.com Visit RealEstate.DocuSign.com to log in
[Click here](#) to learn how to use DocuSign

DocuSign is used to send contracts to clients for signatures through "Opportunities" within [KW Command](#)
Please follow [these instructions](#) to finish setting up your account.

Or feel free to provide the password for testagnet@kw.com, and we can finish setting up the account for you.

☐ Login with DocuSign

DocuSign

Please log in to your account

reeseirino@kw.com

LOG IN

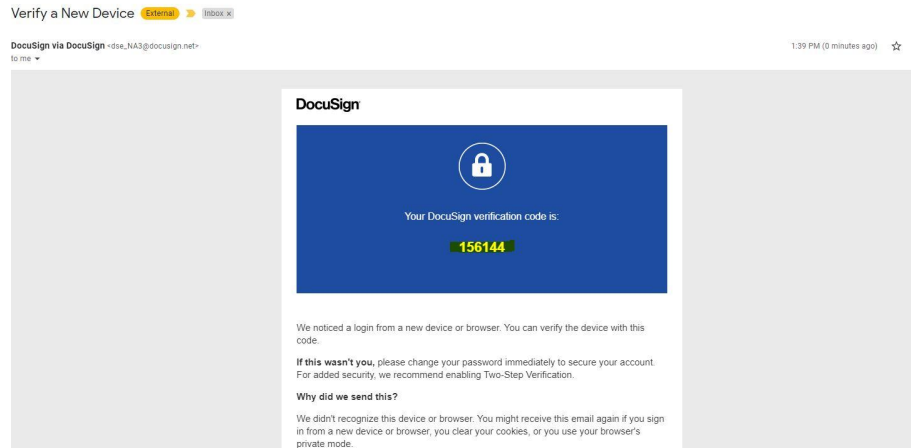
[Forgot password](#)

[Sign in as a different user](#)

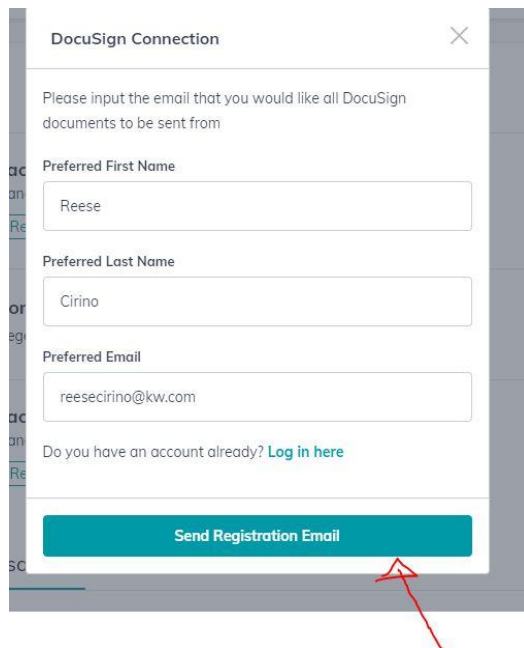
[Cancel](#)

English (US) | Help | Terms | Intellectual Property | Privacy Policy
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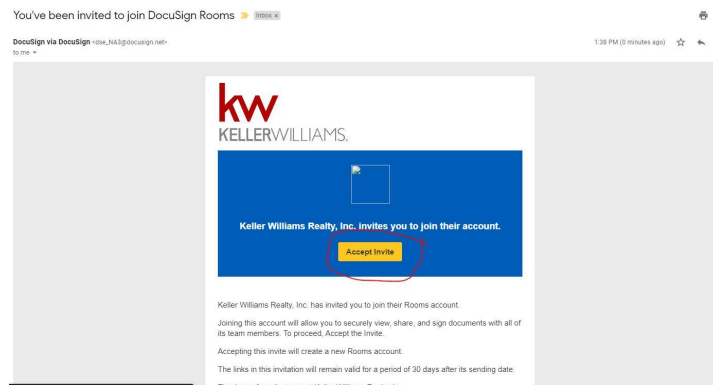
☐ Verification acceptance - Go into your email



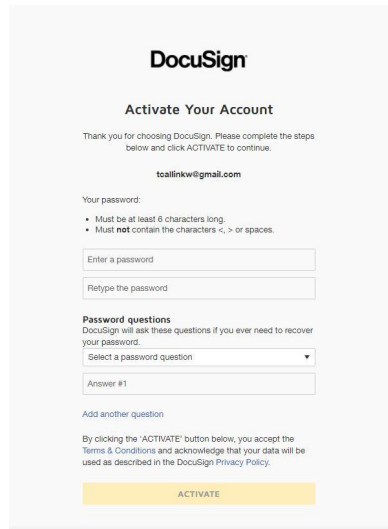
- ❑ Copy and paste code to DocuSign
- ❑ **Option 2: (if you have been with our office a while)**
- ❑ Type in name and email (email cannot be associated with a previous DocuSign Account) and click send registration



- ❑ Accept invite in your email

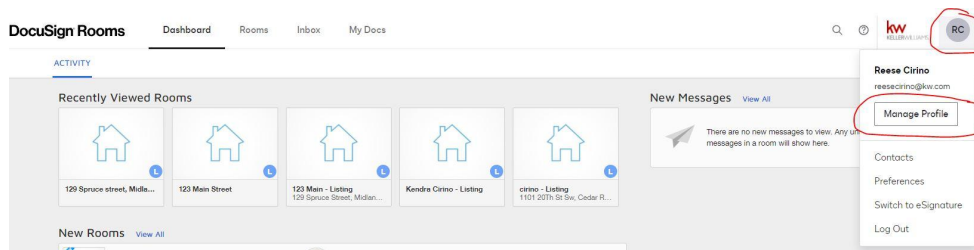


- ❑ Create password and security questions

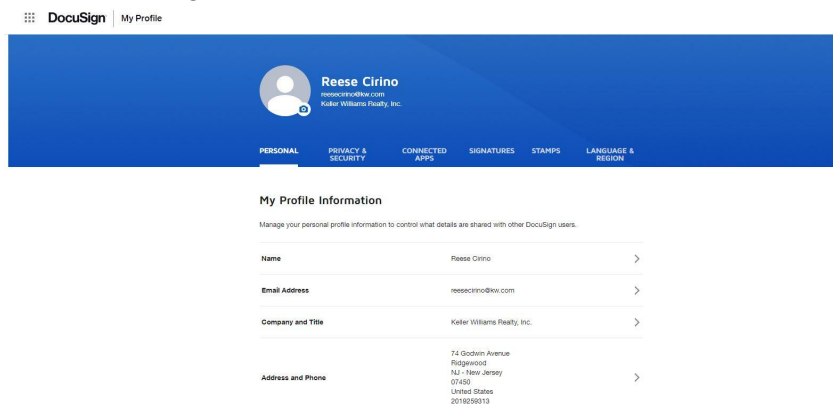


The image shows the DocuSign 'Activate Your Account' page. It includes a header with the DocuSign logo and the title 'Activate Your Account'. Below the header, there is a thank-you message and the email address 'tcallinkw@gmail.com'. The 'Your password:' section contains two bullet points: 'Must be at least 6 characters long' and 'Must not contain the characters <, > or spaces.' There are two input fields for 'Enter a password' and 'Retype the password'. The 'Password questions' section has a dropdown menu for 'Select a password question' and an 'Answer #1' input field. At the bottom, there is an 'ACTIVATE' button.

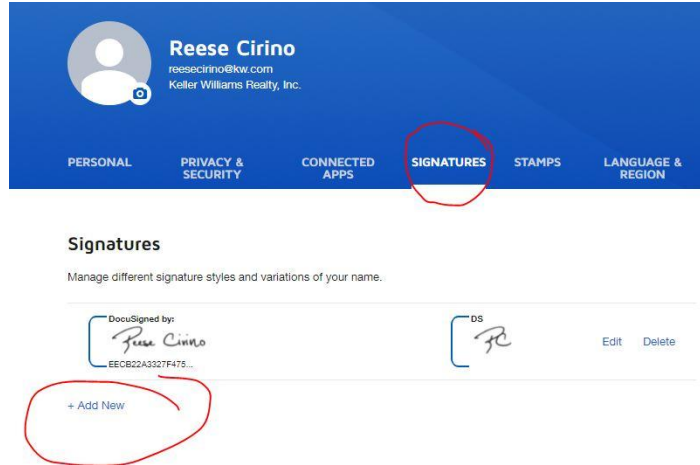
- ❑ Once set up in docusign (you can log into docusign by going to <https://rooms.docusign.com/>)



- ❑ Click on your initials in the top right corner
- ❑ Click on manage profile



- ❑ Add your photo
- ❑ Make sure your contact information is correct
- ❑ Create your signature



If you would like to Deactivate the two-step verification process:

- disable both the **two step verification** and **device verification** with this link: <https://account.docuSign.com/me/privacy-security/#/deviceverification> ; once that is complete, we can take a look at your DocuSign account for you!
- Below is a screenshot of how that should look once both are disabled. Please just let us know once this has been completed. Thank you!

Privacy and Security

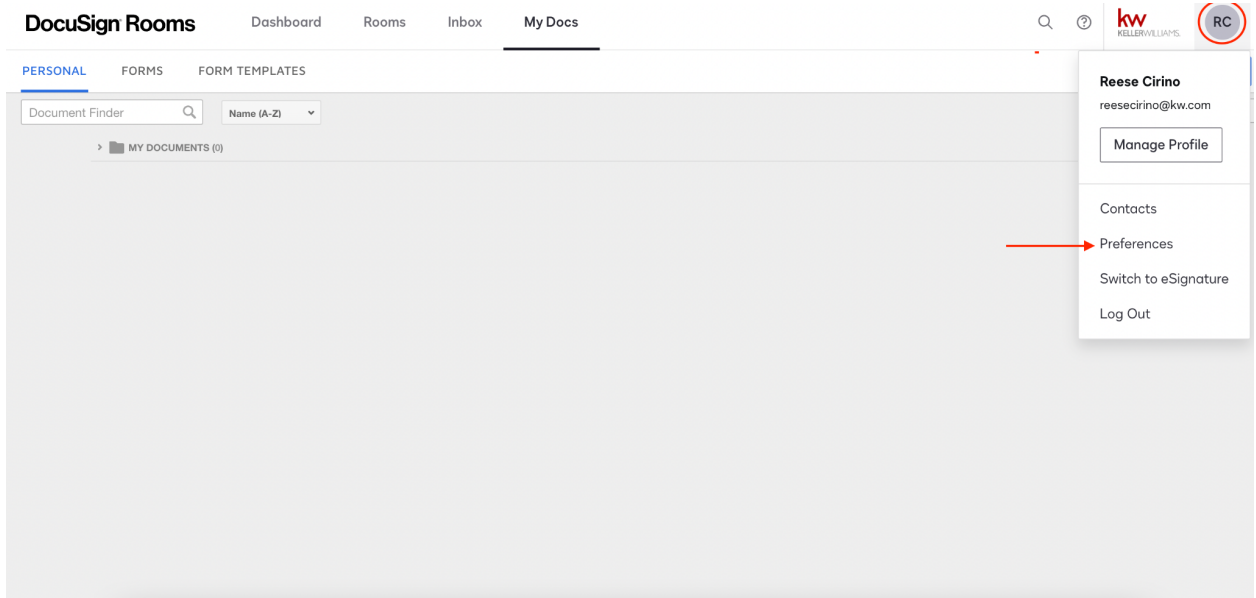
Actively manage your privacy and security. Keep your password and identification methods safe and up-to-date.

Password	Updated on 8/23/2019	>
Two-Step Verification	Not Enabled	>
Device Verification	Not Enabled	>
Certificates		>
Recent Activity		>

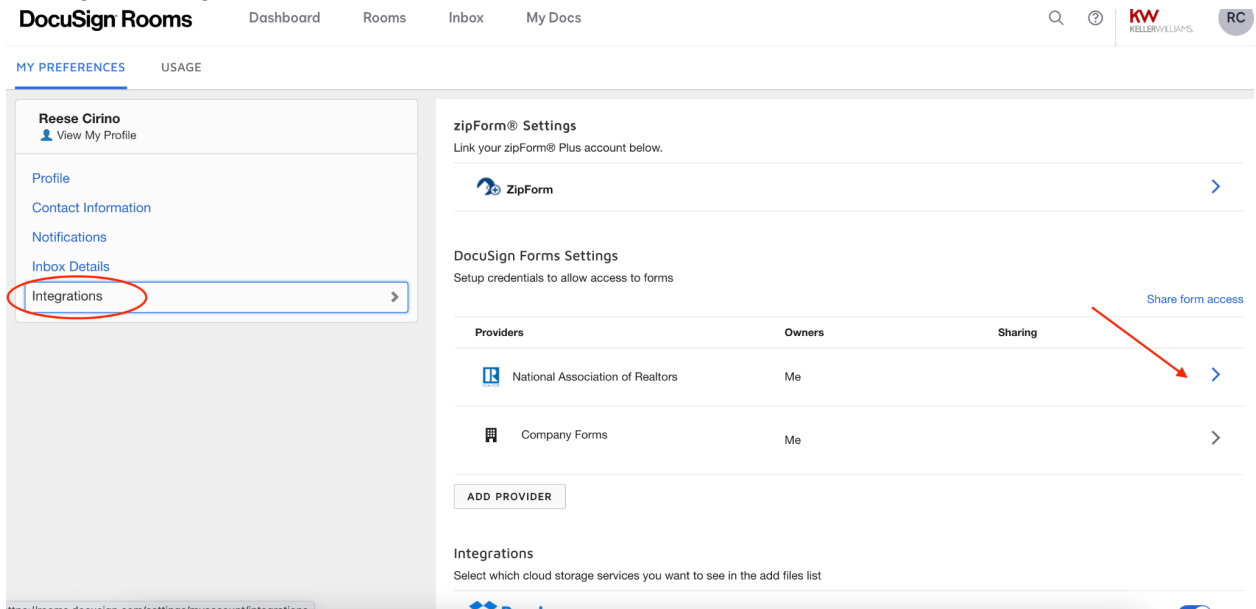
Setting Up Your NRDS Number in DocuSign:

- Go do <https://rooms.docuSign.com/mydocs>

- Click on your initials in the top right then go to preferences



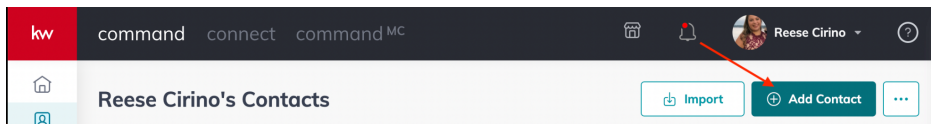
- Then go to integrations on the left and click on NRDS id to set it up



- There will be a button that you can search your name and information if you don't know your NRDS ID
- Without doing this step none of the documents will populate

Starting a Transaction:

- Create a contact by clicking add contact



- Click on that contact

Go to opportunities on the right side

The screenshot shows the contact profile for Kendra Cirino. On the right side, there is a navigation menu with tabs: Timeline, Opportunities (8), SmartPlans, Tasks, Notes, and Saved Searches. A red arrow points to the Opportunities tab.

Click create an opportunity

The screenshot shows the contact profile for Kendra Cirino. In the Opportunities tab, there is a '+ Create Opportunity' button. A red arrow points to this button.

Fill the information in

The 'Create Opportunity' form contains the following fields:

- Market Center*: Ridgewood
- Team: Select a team
- Opportunity Type*: Select Type
- Owner*: Reese Cirino
- Client*: Kendra Cirino
- Co-Seller: Search...
- Opportunity Name*: [Empty field]
- Custom tags: Select tags
- Estimated Closed Date: [Calendar icon]

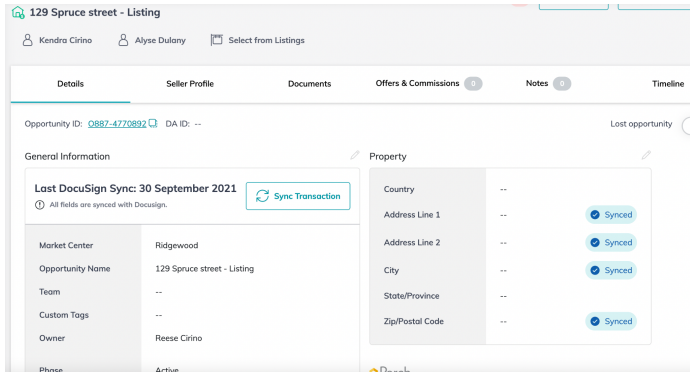
Buttons: Cancel, Create

Then click on the opportunity card

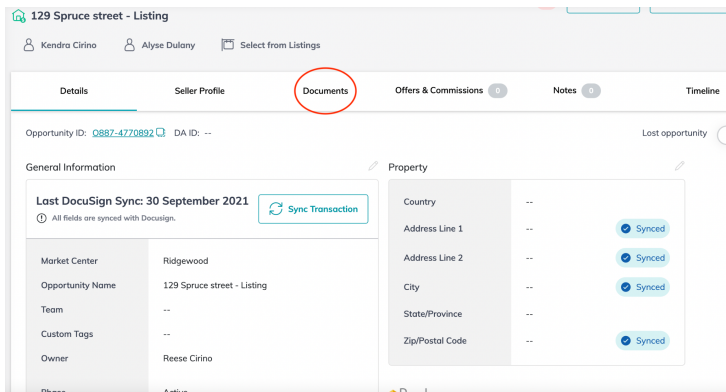
The screenshot shows the opportunity card for '129 Spruce street - Listing'. A red arrow points to the card.

Stage	Phase	Commission
Staging	Active	2.50%

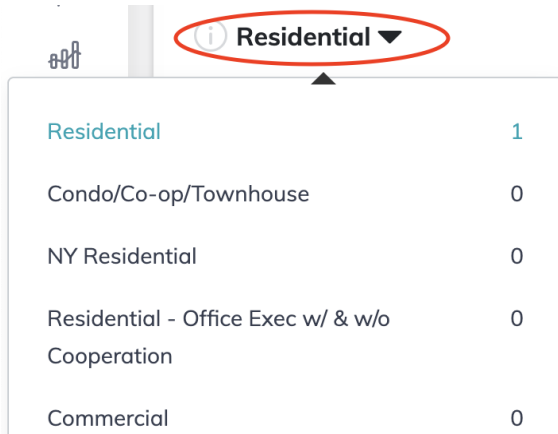
Go into details



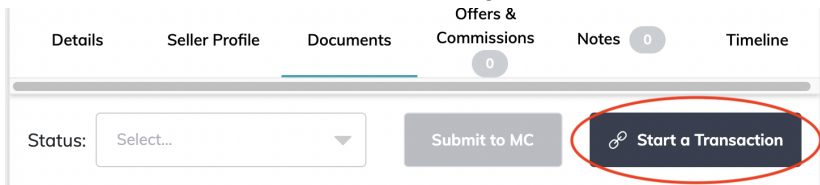
- ❑ Change property address name in details
- ❑ Go to documents



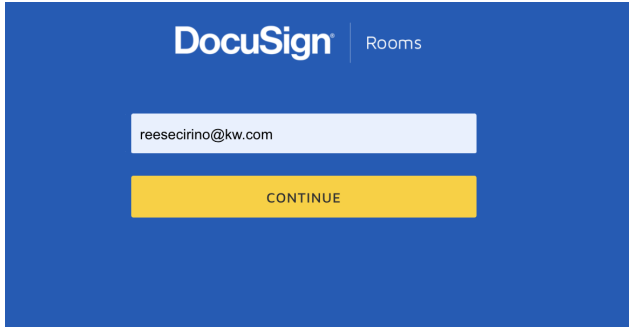
- ❑ Choose the correct checklist on the left hand side



- ❑ Click start transaction in top right of the documents



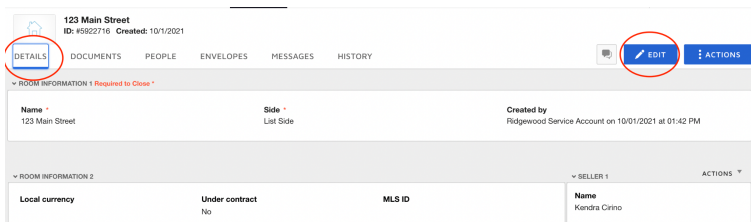
- ❑ Login with your DocuSign email and password



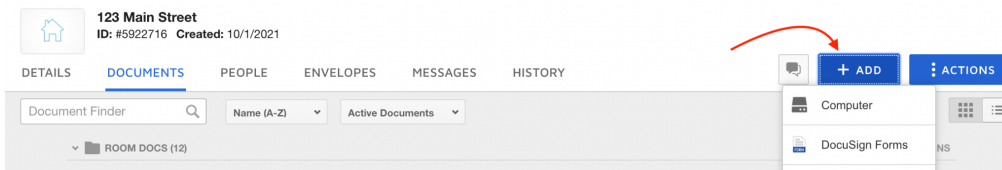
- ☐ this will populate all documents from documents to docuSign

Once in DocuSign:

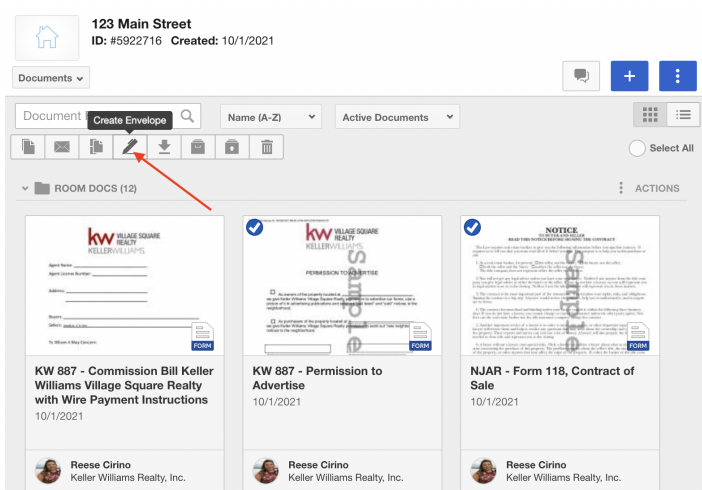
- ☐ Fill out details section



- ☐ Fill out your documents
- ☐ Add any additional documents needed by:



- ☐ Add document
- ☐ Choose docuSign forms (for in house forms)
- ☐ Choose computer for additional PDF documents that may need to be signed (example: Buy Side LP/SD)
- ☐ Select the documents you want to send to your client




❑ Create an envelope


- ❑ Rename Envelope Name
- ❑ Choose recipients by pretagged roles

Please DocuSign

Add Documents to the Envelope



KW 887 - Permissio...
1 Page
Reese Cirino ·



NJAR - Form 118, C...
13 Pages
Reese Cirino ·

Add Recipients to the Envelope

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

+ ADD RECIPIENT ▾

Pre-Tagged Roles

Add Pre-Tagged Roles

Search

Role	Documents	Recipient
<input checked="" type="checkbox"/> Seller One	KW 887 - Permission to Advertise, NJA...	Kendra Cirino ▾
<input checked="" type="checkbox"/> Seller Two	KW 887 - Permission to Advertise, NJA...	-- Select -- ▾
<input checked="" type="checkbox"/> Listing Agent	KW 887 - Permission to Advertise, NJA...	Reese Cirino ▾
<input type="checkbox"/> Seller Three	NJAR - Form 118, Contract of Sale	-- Select -- ▾
<input type="checkbox"/> Seller Four	NJAR - Form 118, Contract of Sale	-- Select -- ▾
<input type="checkbox"/> Buyer One	NJAR - Form 118, Contract of Sale	-- Select -- ▾
<input type="checkbox"/> Buyer Two	NJAR - Form 118, Contract of Sale	-- Select -- ▾

ADD SELECTED CANCEL

Add Recipients to the Envelope

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

1 Seller One NEEDS TO SIGN MORE
Kendra Cirino
reesecirino@gmail.com

1 Seller Two NEEDS TO SIGN MORE
Full name
Email

2 Listing Agent NEEDS TO SIGN MORE
Reese Cirino
reesecirino@kw.com

ADD RECIPIENT

Message to All Recipients

- and recipient order
 - 1. Your clients
 - 2. Yourself
- Change Message to All Recipients
- Click next in top right

Please DocuSign ACTIONS SAVE & CLOSE NEXT

Add Recipients to the Envelope

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

- Prepare any last minute additional add ins in all documents
- Make sure everyone's signatures are correct
- Add signatures to any uploaded pdf documents

Kendra Cirino

Search Fields

Standard Fields
Signature
Initial
Date Signed
Name
Email
Company
Title
Text
Checkbox
Dropdown

kw VILLAGE SQUARE REALTY KELLERWILLIAMS

PERMISSION TO ADVERTISE

As members of the property located at we give Keller Williams Village Square Realty permission to advertise our home, use a picture of its advertising publications and related "off line" and "old" notices to the neighborhood.

As purchasers of the property located at we give Keller Williams Village Square Realty permission to send out "new neighbor" notices to the neighborhood.

Seller
Sales Representative
Cell Phone

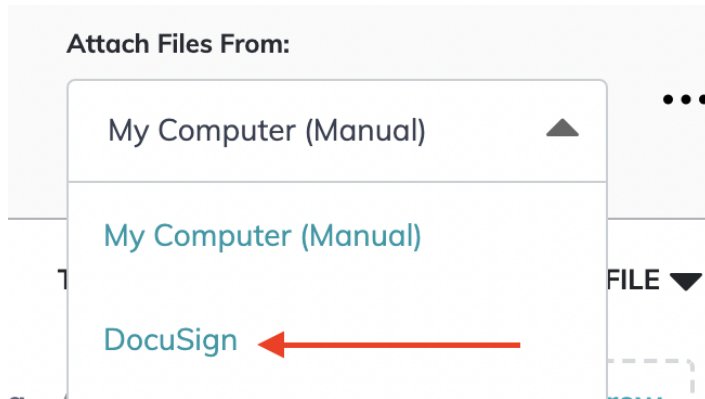
KW 887 - Permission to Advertise.pdf
Pages: 1

NJAR - Form 118, Contract of Sale.pdf

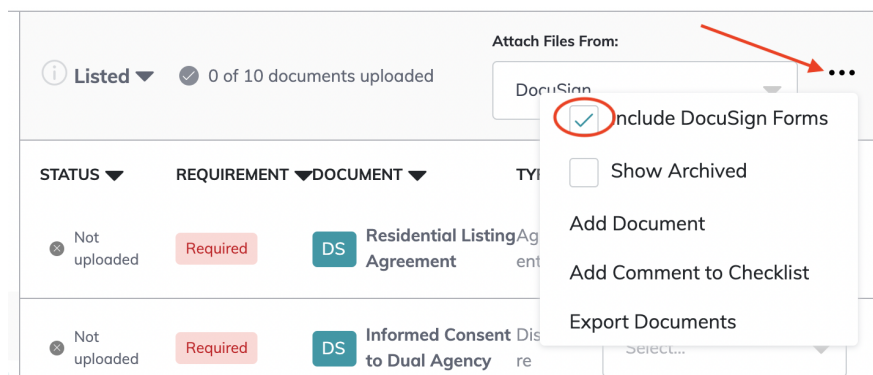
- Once done click send

Once Documents are signed by ALL parties:

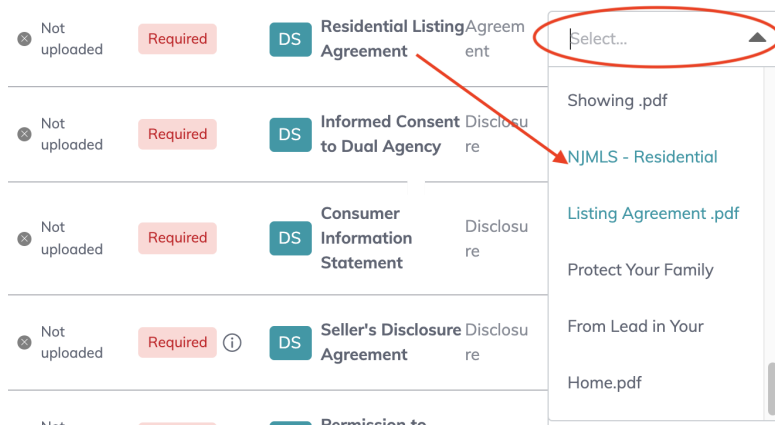
- Go into documents in your opportunity



Change attach files to DocuSign



Click the three dots and choose include DocuSign forms



Assign the correct documents to its placeholder

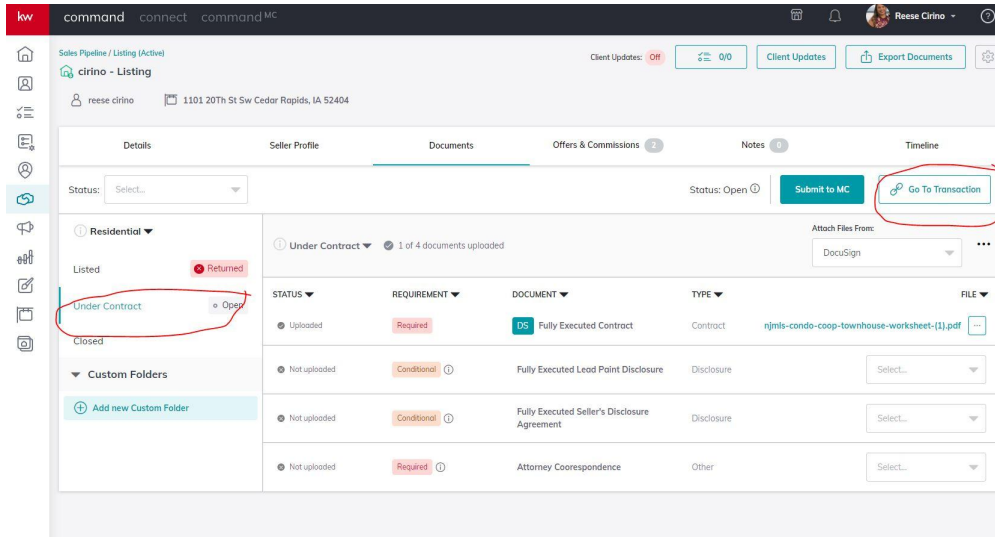
Submit to MC

Once compliance has been approved and signed by sally you will get an email (Listing)

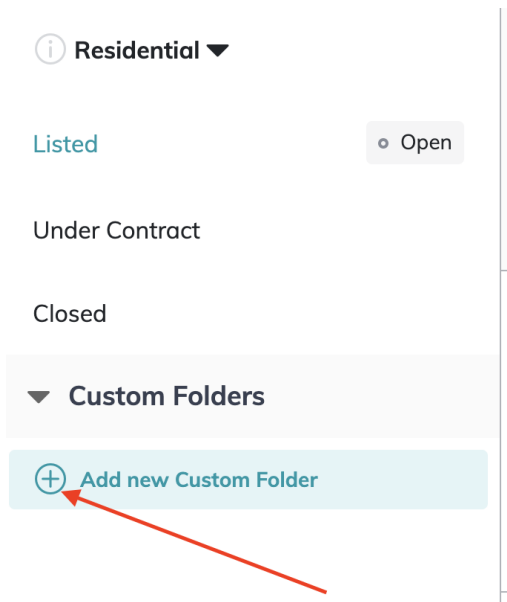
REMEMBER FOR LISTINGS NO LISTING CAN GO LIVE UNTIL ALL DOCUMENTS HAVE BEEN APPROVED IN ADDITION TO SALLY'S SIGNATURE

If your opportunity is returned once you add/correct the document you will click resubmit for Sally to approve

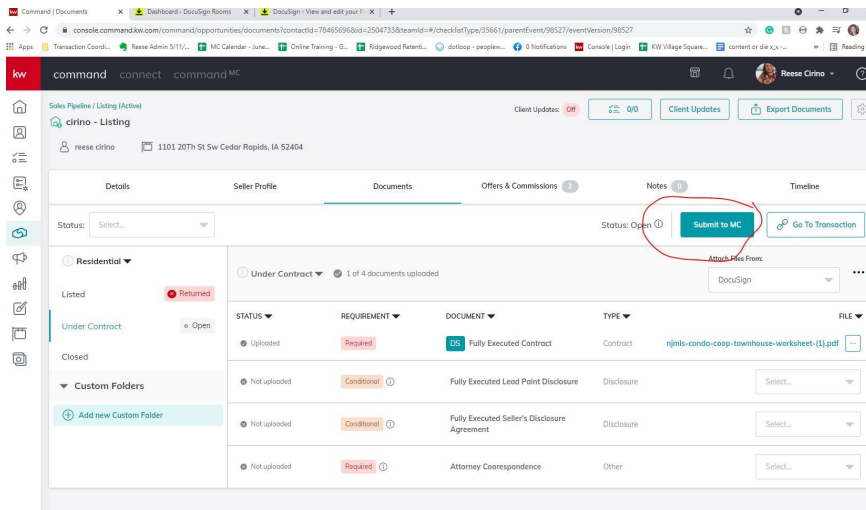
Once Under Contract:



- You would click under the checklist under contract documents
- Click go to transaction
- [Prepare any documents needed to send to your clients \(same steps as once in docuSign\)](#)
- Create a new envelope
- Repeat all steps continued in once in DocuSign
- Attach all documents to its placeholders
- Make sure to create custom folder for Attorney Correspondence



- After the inspection has been completed submit under contract folder to MC



If your opportunity is returned once you add/correct the document you will click resubmit for Lynn to approve

Submit your commissions in command

Commissions in Command(Getting Paid!)

[Watch this video that walks you through how to get paid!](#)

Go to Offers & Commissions (List and Buy Side)

Add all offers that you have received or made

Once you have a executed contract you will accept the offer

Once accepted you will be able to click on Manage Commissions

This is where you will input all of your information

Click edit general information

Add the contract date

(Buy Side): Take out the listing fee from the gross commission

If you are doing this you will then go to edit agent payment and click the calculate commission button to correct the amount you will get paid

Edit Agent Payment ✕

Agent Name*
 Reese Cirino ✕ ▼

Agent Units* Agent Gross Commission*
↻ Calculate Commission

Associate Royalty
 Rate 6.0%
 Split 100.0%

Company Commission
 Split 30.0%

Additional Deductions

E&O
 KW Cares
 KW Kids Can
 BOLD Scholarship

Net to Agent

Extra Payment Options ⊕ Add Item
 Referrals, Bonuses, Deductions, Concessions

Cancel Save Changes

Details Seller Profile Documents **Offers & Commissions 1** Notes 1 Timeline

Offers & Commissions / Manage Commission

General Information				Summary	
✎ Edit General Information				Total Commission	\$12,500.00
Sales Price	Commission Rate	Total Commission	Total Units	Pay to Office	\$4,500.00
\$500,000.00	2.5%	\$12,500.00	1.0	Associate Royalty	\$750.00
Contract Date*	Closed Date*	DA ID		Company Commission	\$3,750.00
03/25/21	10/14/21	--		Additional Deductions	\$0.00
				Pay to Agents	\$8,000.00
				Reese Cirino	\$8,000.00

Payment ⊕ Add Another Agent ⊕ Add Co-Broker Payment ⊕ Add Note

Reese Cirino				0%	
Agent Units	Agent Gross Commission	Net Pay to Agent	Payment date	Cap:	\$3,000.00
1.0	\$12,500.00	\$8,000.00	10/14/21	Actual:	\$0.00
PAYMENT BREAKDOWN				Balance:	\$3,000.00
Agent Gross Commission		\$12,500.00			
Associate Royalty		-\$750.00			
Rate	6.0%				
Split	100.0%				
Company Commission		-\$3,750.00			

Submit

Next you would go to edit agent payment information

Edit Agent Payment ✕

Agent Name*
 Reese Cirino ✕ ▼

Agent Units* Agent Gross Commission*
↻ Calculate Commission

Associate Royalty -\$750.00

Rate	6.0%
Split	100.0%

Company Commission -\$3,750.00

Split	30.0%
-------	-------

Additional Deductions -\$0.00

E&O	<input type="text" value="\$0.00"/>
KW Cares	<input type="text" value="\$0.00"/>
KW Kids Can	<input type="text" value="\$0.00"/>
BOLD Scholarship	<input type="text" value="\$0.00"/>

Net to Agent \$8,000.00

Extra Payment Options ⊕ Add item
Referrals, Bonuses, Deductions, Concessions

Cancel Save Changes

- You can add charitable donations
- (List Side): click add item next to payment options
 - This is where you will choose bonus
 - To put in the listing fee
- Under Extra Payment Options :
 - Choose OUTSIDE REFERRAI
 - This is where you would put any outside referral information
- If you are co-listing or have a referral to someone in KWVSR

Payment

⊕ Add Another Agent ⊕ Add Co-Broker Payment

- You are going to click add agent

- Type in their name
- Add the unit they will be getting
- Then click calculate commissions to automatically calculate the commission from gross commission
- Once you have updated all information before clicking submit

- Add any information you may want Lynn To know!
 - Examples
 - Referral agent company and the referral amount
 - Dual agency (whether with yourself or another agent)
 - If the date is still a little unsure
- Then you click submit
 - You will get an email when lynn has approved it or if there are any issues!

4 Most Important Steps When Doing a Transaction in Command

1. Choosing the correct opportunity type Initially

Create Opportunity

Market Center*
Ridgewood

Opportunity Type*
Select Type

Client*
Kendra Cirino

Opportunity Name*

Custom tags
Select tags

Estimated Closed Date

Team
Select a team

Owner*
Reese Cirino

Co-Seller
Search...

Cancel Create

2. Clicking Pick Checklist Type BEFORE Clicking Start a Transaction

command connect command^{MC}

Sales Pipeline / Listing (Cultivate)

123 - Listing

Natalie Certosimo Select from Listings

Client Updates: Off 0/0 Client Updates Export Documents

Details Seller Profile Documents Offers & Commissions 0 Notes 0 Timeline

Status: Select...

Pick checklist type

Custom Folders
Add new Custom Folder

To start work with opportunity please select checklist type first

Start a Transaction

3. Clicking the Check Box on Each Document THEN Clicking Create Envelope

123 Main Street
ID: #5922716 Created: 10/1/2021

Documents

Document Create Envelope Name (A-Z) Active Documents

ROOM DOCS (12)



KW 887 - Commission Bill Keller Williams Village Square Realty with Wire Payment Instructions 10/1/2021
 KW 887 - Permission to Advertise 10/1/2021
 NJAR - Form 118, Contract of Sale 10/1/2021

Reese Cirino Keller Williams Realty, Inc.

4. Choosing Pretagged Roles When Click Adding Recipients

Please DocuSign

Add Documents to the Envelope

 KW 887 - Permissio... 1 Page Reese Cirino .	 NJAR - Form 118, C... 13 Pages Reese Cirino .
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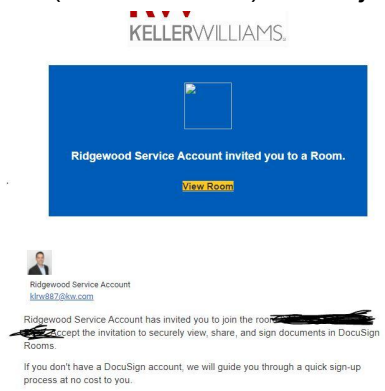
Add Recipients to the Envelope

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

ADD RECIPIENT ▾
Pre-Tagged Roles

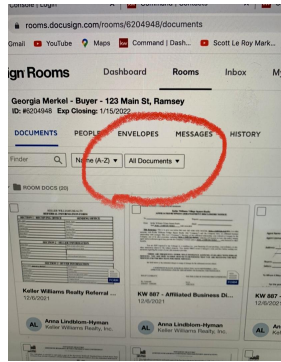
Additional Things to Note

- When you create a room you will get an email that says you have been invited to a room (this is correct) This is just stating that the “office” has added your room



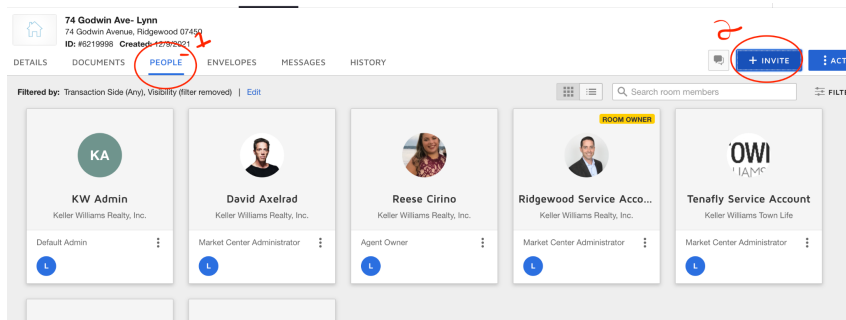
- Name the Opportunity For a listing (property address) for a buyer(buyer name)

- Make sure your documents are on ALL Documents



- If you are co-listing or co-selling with someone and you are not on a team the only way that other agent will have access to those documents is if you add them to the PEOPLE section of your Room . **YOU ONLY WANT TO DO THIS IF YOU ARE CO-LISTING OR CO-SELLING WITH SOMEONE**

- Once you are in the room click on People then click add in the top right



- The office will be using opportunities as the way to find agents for specific listings. Please make sure the opportunity name is the listing address