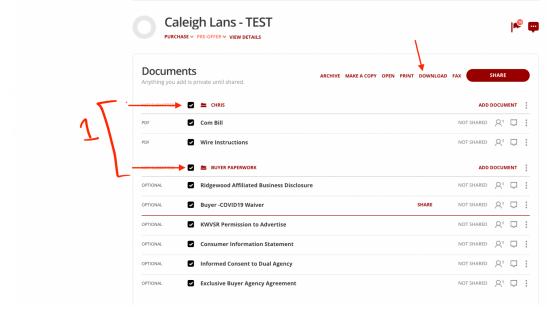
Your Walk- Through Guide to Setting Up DocuSign, Opportunities, Preparing Documents, Obtaining Signature,Compliance, and Commissions in Command.

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**

0

- 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

De	etails	Seller Profile		Documents	Offers & Commi	ssions 💿	Notes		Timeline
Status: S	elect	-		$\smile$		Status: Open (	D Sut	omit to MC	P Go To Trans
i Reside	ntial 🔻		Listed <b>v</b>	3 of 13 documents uplo	aded	Attach Files From: DocuSign			ing Folder:
Listed	• (	)pen	Add comment						Include DocuSign
Under Cont	tract	STA	atus 🔻	REQUIREMENT 🔻	DOCUMENT 🔻		TYPE 🔻		Show Archived
Closed		0	Uploaded	Required	DS Residentio		Agreement		Export Documents
	n Folders 🧷	•	Uploaded	Required	DS Informed Agency	Consent to Dual	Disclosure	njar-fo to-du	m-122b-informed-consent al-agency-seller-signed.pc
🕀 Add ner	w Custom Folder	0	Not uploaded	Required	DS Consumer Statement	Information	Disclosure		Select
Attornov C		0							
ıman	Add item						$\times$		
	FULL LISTING	DOCUME	NTS						
Selle								Ne	
	Document type*						- 1	_	
-	Other						-		
	Additional not	e							
Open	Source of Docum	ents*							
	DocuSign							PE 🔻	
	My Computer	(Manual) 🗸					g	reeme	
	DocuSign								
	Custom Folder	s					is	closu	
			Cancel	Sav	/e		is	closu	
0									

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

Status: Select	-					Submit t	o MC	🔗 Go To	Transaction
i Residential 🔻		i Under Contra	ct 🔻 🕝 0 of 4 docum	ents uploaded	Attach Files From:		Working Fold	er:	
	o Open	Dia Add comment	•		DocuSign	-	Select		-
Listed Under Contract	o Open	STATUS 🔻	REQUIREMENT 🔻			ТҮРЕ 🔻			FILE
Closed		Not uploaded	Required	DS Fully Exect	uted Contract	Contract		Select	-
Custom Folders		Not uploaded	Conditional (j)	Fully Executed L Disclosure	ead Paint	Disclosure		Select	-
Add new Custom Folder  Attorney Correspondence	0	Not uploaded	Conditional (j)	Fully Executed S Agreement	eller's Disclosure	Disclosure		Select	-

	Under Contract: Checklist Comments	$\times$
ι	Use an '@' symbol to @ mention an individual and send a notification:	
	@Lynn Granski This transaction was started in dotloop. Please see the fully executed copy of all documents	1
	Cancel Add Reply	

#### **Docusign Profile Set Up**

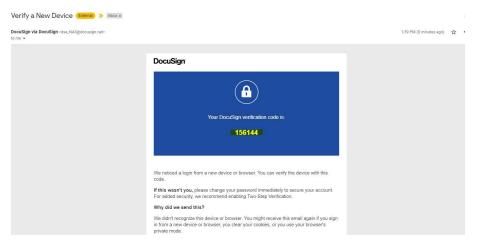
- Reese Cirino command connect command<sup>MC</sup> kw ۵ Welcome Home, Reese 2 Reese Cirino ~≞ š≣ Tasks Profile 8 얈? Settings න 🔄 Command Training Þ You have no tasks fo You can create a nev <del>888</del> Ð Click connect account next to docusign Digital Signature & Transactions DocuSign DocuSign provides electronic signature technology and Not Connected Docu*Sign* digital transaction management services for facilitating electronic exchanges of contracts and signed documents
  - □ Option 1 : ( if you received a password) Sign In with the email given to you in Scott Leroy Password Sheet

Go into settings in command

	DocuSign Email	×	
	Please input the email address associc DocuSign account.	ted with your existing	
	Preferred Email		
	testagent@kw.com		
	Don't have account yet? Create one he	re	
	Log in to DocuSi	jn	
ocuSign Username/Email:	testagent@kw.com	Visit RealEstate.DocuSign.com to log in	
		Click here to learn how to use DocuSign	
Please follow these instruction	ntracts to clients for signatures through "Oppo ons to finish setting up your account. ssword for <u>testagnet@kw.com</u> , and we can fin		
🖵 Login v	with Docusign		

Please log in to your
reesecirino@kw.com
LOG IN
Forgot password
Sign in as a different user
Cancel

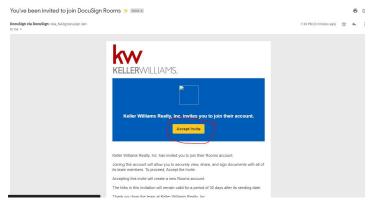
□ Verification acceptance - Go into your email



- □ 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

DocuSign Connection	×
Please input the email that you would like all DocuSign	
documents to be sent from	
Preferred First Name	
Reese	
Preferred Last Name	
Cirino	
Preferred Email	
reesecirino@kw.com	
Do you have an account already? Log in here	
Send Registration Email	
- 4	
<b>N</b>	

#### Accept invite in your email



□ Create password and security questions

Ac	tivate Your Account
	noosing DocuSign. Please complete the steps w and click ACTIVATE to continue.
	toallinkw@gmail.com
Your password:	
	ast 6 characters long. Itain the characters <, > or spaces.
Enter a passwo	brd
Retype the pas	isword
Password que DocuSign will as your password.	stions ik these questions if you ever need to recover
Select a passv	vord question 🔻
Answer #1	
Add another que	estion ACTIVATE" button below, you accept the
Ferms & Conditi	ons and acknowledge that your data will be ad in the DocuSign Privacy Policy.

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

ACTIVITY				Reese Cirin
Recently Viewed Rooms			New Messages View All	reesecirino@i
129 Spruce street, Midfa 129 Man Street 120 Man Street 120 Man Street 120 Man Street 120 Man Street	n - Lating an Street, Midan.	Crino - Listing 1101 20Th Ex Swr, Cedar R	There are no new message messages in a room will a	
Click on your init	iale in the ten	right corpor		
	=	ngni comer		
Click on manage	profile			
III DocuSign My Profile	•			
	Reese Cirino	)		
	Reese Cirino researched with the Williams Feastly. In			
	ressection@kw.com		MPS LANGUAGE & REGION	
	PERSONAL PROVINCE A	CONNECTED SIGNATURES STA	REGION	
	PERSONAL PROVINCE A	IC CONNECTED SIGNATURES STA APPS	REGION	
	PERCENT REPORTED TO A CONTRACT OF THE CONTRACT	CONNECTED SIGNATURES STA	REGION	
	And States and St	CONNECTED SIGNATURES STA APPS control what details are shared with other Docu Resss Chino	REGION	

- □ Make sure your contact information is correct
- □ Create your signature

0	reesecirino@kw.com Keller Williams Realt				
PERSONAL	PRIVACY & SECURITY	CONNECTED APPS	SIGNATURES	STAMPS	LANGUAG REGIO
Signature	s				
Manage different	signature styles and va	riations of your name.			
Manage different	signature styles and va d by: Ciwno	riations of your name.	DS T	3_	Edit De

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

- disable both the two step verification and device verification with this link: <u>https://account.docusign.com/me/privacy-security/#/deviceverification</u>; 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!

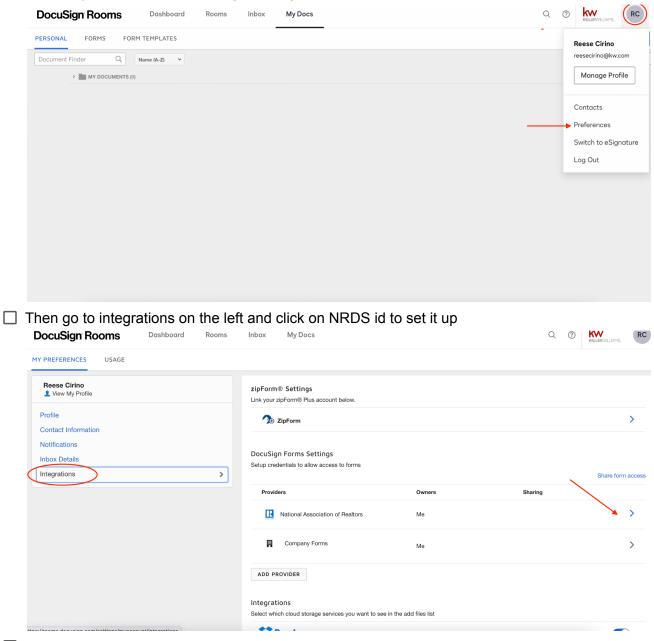
# **Privacy and Security**

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

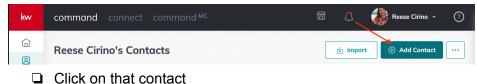


#### Click on your initials in the top right then go to preferences

- 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



#### Go to opportunities on the right side



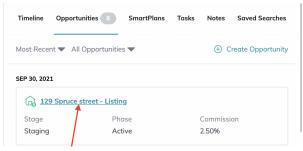
#### Click create an opportunity

Kendra Cirino	0	Timeline Opportu	smartPlans	Tasks Notes Saved Searches
Contact's Health Score 40%		Most Recent 🔻 🖌	All Opportunities 🔻	<ul> <li>Create Opportunity</li> </ul>
Mark as Lead		SEP 30, 2021		
☐ reesecirino@gmail.com		🕞 129 Spruc	e street - Listing	
reesectimo@gmail.com		Stage	Phase	Commission
		Staging	Active	2.50%
Lead Source				

#### □ Fill the information in

Market Center*		Team	
Ridgewood	~	Select a team	$\nabla$
Opportunity Type*		Owner*	
Select Type	-	Reese Cirino	~
Client*		Co-Seller	
Kendra Cirino	× •	Search	T
Opportunity Name*			
Custom tags			
Select tags			~
Estimated Closed Date			
Estimated Closed Date			
Estimated Closed Date		Commission Date:	

#### □ Then click on the opportunity card



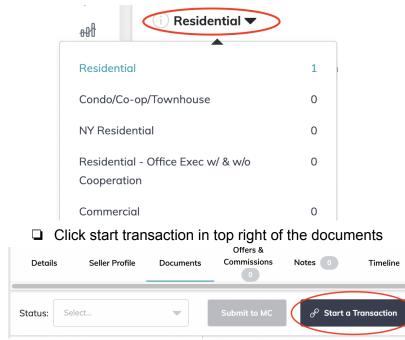
Go into details

Detoils	Seller Profile	Documents	Offers & Commissions	Notes 💿	Ti
pportunity ID: 0887-4770	892 💭 DA ID:				Lost opportur
eneral Information			Property		
Last DocuSign Sync	: 30 September 2021		Country		
		C Sync Transaction	Country		
① All fields are synced with		C Sync Transaction	Address Line 1		Synced
All fields are synced with     Market Center		C Sync Transaction			<ul><li>Synced</li><li>Synced</li></ul>
· · ·	Docusign.	]	Address Line 1		
Market Center	Docusign.	]	Address Line 1 Address Line 2		Synced

# Change property address name in detailsGo to documents

🕞 129 Spruce street - L	isting					
🔓 Kendra Cirino 🔗	Alyse Dulany 🛅 Sele	ect from Listings				
Details	Seller Profile	Documents	Offers & Commissions	Notes 0		Timeline
Opportunity ID: 0887-4770	1892 💭 DA ID:	<u> </u>			Lost opport	tunity (
General Information			Property			
Last DocuSign Syne () All fields are synced with	c: 30 September 2021 h Docusign.	C Sync Transaction	Country Address Line 1		Synced	
Market Center	Ridgewood		Address Line 2		Synced	
Opportunity Name	129 Spruce street - List	ing	City		Synced	
Team	-		State/Province	-		
Custom Tags	-		Zip/Postal Code		Synced	
Owner	Reese Cirino					
Dhana	A mili un					

• Choose the correct checklist on the left hand side



Login with your DocuSign email and password

□ this will populate all documents from documents to docusign

# Once in DocuSign:

V ROOM DOCS (12)

WILLACE SQUARE

KW 887 - Commission Bill Keller Williams Village Square Realty with Wire Payment Instructions 10/1/2021

Reese Cirino Keller Williams Realty, Inc.

0

FORM

ALL DATIONS AND DATIONS OF COMPANY As portains if the property load we peritailer Witaria Village Square Re-relices to the neighborhood -

WILLAGE SOLIARE

KW 887 - Permission to Advertise 10/1/2021

Reese Cirino Keller Williams Realty, Inc.

S

Ð

FORM

📮 Fill c	out details sec	tion								
123 Main Street ID: H5922716 Created: 1 DOCUMENTS PE + ROOM INFORMATION 1 Required to Close *	0/1/2021 COPLE ENVELOPES MESSAGES	HISTORY		EDIT	: actions					
Name * 123 Main Street	Side * List Side		Created by Ridgewood Servic	e Account on 10/01/2021 at 01:	42 PM					
V ROOM INFORMATION 2				✓ SELLER 1	ACTIONS *					
Local currency	Under contract No	MLS ID		Name Kendra Cirino						
📮 Fill c	out your docur	nents								
🗅 Add	any additiona	l documents	neede	ed by:						
123 Main ID: #59227	Street 16 Created: 10/1/2021									
DETAILS DOCUM	ENTS PEOPLE ENV	ELOPES MESSAGES	HISTORY				+ ADD	ACTIONS		
Document Finder	Q Name (A-Z) Y	Active Documents					Computer			
V ROOM DO	CS (12)						DocuSign Forms	NS		
Ę	Add docun	nent								
Ę	Choose do	ocusign form	s (for i	n house	forms)					
Ę		mputer for a		nal PDF	docume	ents	that ma	ay need	to be sign	ed (
	•	Buy Side LP/		• •						
Sele	ct the docume	ents you war	it to se	end to yo	ur clien	t				
123 Main 123	Street 6 Created: 10/1/2021									
Documents 🗸										
Document   Create Envelo		Active Documents								
				Select	All					

0

OTICE

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-Jord

NJAR - Form 118, Contract of Sale 10/1/2021

Reese Cirino Keller Williams Realty, Inc.

A state of the set of

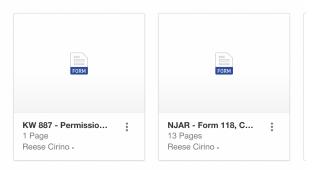
ACTIONS

#### □ Create an envelope

- □ Rename Envelope Name
- Choose recipients by pretagged roles

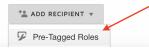
-		
Please	DocuSign	

Add Documents to the Envelope



#### Add Recipients to the Envelope

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



#### Add Pre-Tagged Roles

Role	Documents	Recipient
Seller One	KW 887 - Permission to Advertise, NJA	Kendra Cirino
Seller Two	KW 887 - Permission to Advertise, NJA	Select
Listing Agent	KW 887 - Permission to Advertise, NJA	Reese Cirino
Seller Three	NJAR - Form 118, Contract of Sale	Select
Seller Four	NJAR - Form 118, Contract of Sale	Select
Buyer One	NJAR - Form 118, Contract of Sale	Select
Buyer Two	NJAR - Form 118, Contract of Sale	Select

#### Add Recipients to the Envelope

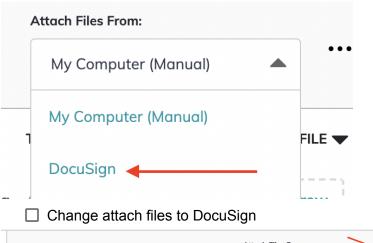
As th	e sende	er, you automatic	Illy receive a co	py of the completed	d envelope.				
1		Seller One				NEEDS	TO SIGN 🔻	MORE V	
	1	Kendra Cirino			8				
		reesecirino@gmai	com						
1		Seller Two				NEEDS	TO SIGN 🔻	MORE T	
		Full name			8				
		Email							
2		Listing Agent					TO SIGN V		
2		Reese Cirino			8	NEEDS	TO SIGN ¥	MORE V	
		reesecirino@kw.cr	m						
	ADD RE	ECIPIENT V							
Mes	sage t	o All Recipier	ts						
		and re		r clients					
				sage to A		inionte			
	_	-		-		pients	)		
			extint	op right		_			
	se Docu				(	οιτιο	NS 🔻	SAVE & CLOSI	NEXT
Add	l Rec	ipients to	the Envel	оре					
∆e th	e cendi			conv of the compl				/	
		-	•						II documents
		Make	sure ev	eryone's	signa	tures a	are co	orrect	
		Add sig	gnature	es to any	uploa	ded po	df doo	ument	S
•	Kendra (	Cirino	•	5 ¢	60	59% 🔻			
Q Se	earch Fie	lds	X Doubly Doubly	# D. 0033CAE1-804D-4154-8875-653749463017				887 - Permissio	n to Advertise.pdf
		lard Fields			ILLAGE SQUARE EALTY				
5	Stand	aru Fielus		KELLERVVI			Pag	jes: 1	
		ignature		KELLERVVI			Pag	ges: 1	A Constraints
2		ignature		RELLER			Ρας	jes: 1	
2	<mark>∕</mark> S DS Ir	ignature	P P O	KELLER/VI PERMISSION As cancers of the property located a re yier Keller Willems Village Square Re Kutter of it in advertising publications and applications	I TO ADVERTISE	sur home, use a 46° notices to the	Ρας	yes: 1	
2	<mark>∕</mark> S DS In ☐ D	ignature iitial	9 9 10 10	KELLER/VI PERMISSION	I TO ADVERTISE	kur horne, use a df notices to the tew neighbor <sup>211</sup>	Ρας	jes: 1	
<u></u>	Z S DS In D N	ignature nitial late Signed	л г Э	KELLER/VI PERMISSION As cancers of the property located a re yier Keller Willems Village Square Re Kutter of it in advertising publications and applications	I TO ADVERTISE	tur home, use 'a dir dicess to the new neighbor "			And the second s
2	S Ir S Ir D D	ignature hitial late Signed lame	P N	KELLER/VI PERMISSION As cancers of the property located a re yier Keller Willems Village Square Re Kutter of it in advertising publications and applications	I TO ADVERTISE				And the second s
2	✓ S DS In D D D D D D D D D D D D D D D D D D D	ignature hitial kate Signed lame mail	- - - - - - - - - - - - - - - - - - -	KELLERVMI      PERMISSION      Acoument of the property located in     ery or factor Villeman Villema Vil	I TO ADVERTISE				ontract of Sale.pdf
2	S In S In D D N S E E C C T	ignature iitial late Signed lame mail		KELLERVMI      PERMISSION      Acoument of the property located in     ery or factor Villeman Villema Vil	I TO ADVERTISE				and the second s

Once done click send

Checkbox Dropdown

Once Documents are signed by ALL parties:

 $\hfill\square$  Go into documents in your opportunity



			Attach Files From:			
	(i) Listed ▼	Ø 0 of 10 documents uploaded	Doci	nsign		
	STATUS 🔻		TYI	Show Archived		
	Not	Required DS Residential L	istingAg	Add Document		
į	uploaded	Agreement	ent	Add Comment to Checklist		
	Not	Required DS Informed Cor	nsent Dis	Export Documents		
	uploaded	to Dual Agen	re re			

□ Click the three dots and choose include DocuSign forms

8	Not uploaded	Required	DS	Residential Listing Agreement	Agreem C	Select
8	Not uploaded	Required	DS	Informed Consent to Dual Agency	Disclosu re	Showing .pdf
8	Not uploaded	Required	DS	Consumer Information Statement	Disclosu re	Listing Agreement .pdf Protect Your Family
8	Not uploaded	Required (i)	DS	Seller's Disclosure Agreement	Disclosu re	From Lead in Your
	Mat		_	Permission to		•

- □ 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:

Sales Pipeline / Listing (Active)           Column Column Column           Column Column Column           Column Column Column           Column Column Column Column           Column Colu	it Sw Cedar Rapids, IA 52404		Client Updates: Off	5≞ 0/0	Client Updates	Export Documents
Details	Seller Profile	Documents	Offers & Commissions 2	Note	is 🕕	Timeline
Status: Select				Status: Open 🛈	Submit to MC	P Go To Transact
⑦ Residential ▼ Listed		<ul> <li>I of 4 documents uploa</li> </ul>	ded		Attach Files F DocuSig	
Under Contract • Op	STATUS -		DOCUMENT -	ТҮРЕ 🔻		FI
Closed	Uploaded	Required	DS Fully Executed Contract	Contract	njmls-condo-coop-tow	nhouse-worksheet-(1).pdf
<ul> <li>Custom Folders</li> </ul>	Not uploaded	Conditional	Fully Executed Lead Paint Disclosure	Disclosure		Select
(+) Add new Custom Folder	Not uploaded	Conditional (j)	Fully Executed Seller's Disclosure Agreement	Disclosure		Select
	Not uploaded	Required (i)	Attorney Coorespondence	Other		

- □ 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

i) Residential ▼	
Listed	• Open
Under Contract	
Closed	
Custom Folders	
+ Add new Custom Folder	

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

-					checklistType/35661/parentEvent/98527/event		🖈 😨 🔝 🖶 🛤 🗊 🊷
	imand connec			ning - a 🔛 Nagewood hatena	Sectop - proprint O O Notifications	console Login 🔛 kw vilage squa	
Gi ci	peline / Listing (Active) rino - Listing reese cirino 🕅	1101 20Th St Sw C	iedar Ropids, IA 52404		Client Updates: Off	S≣ 0/0 Client U	odotes 👚 Export Documents 🛛 🖇
	Details		Seller Profile	Documents	Offers & Commissions 📀	Notes 🕕	Timeline
Stat	us: Select	*				Status: Open 🛈 📘	ubmit to MC
	Residential 🕶	S Returned	🕕 Under Contract 🛪	<ul> <li>Ø 1 of 4 documents uploader</li> </ul>	d		Attach Free From:
Lus	der Contract	o Open	STATUS 🔻	REQUIREMENT 🔻	DOCUMENT 🔻	TYPE 🔻	FILE 🔻
	sed	o open	Uploaded	Required	DS Fully Executed Contract	Contract njmls-con	ndo-coop-townhouse-worksheet-(1).pdf
-	Custom Folders		<ul> <li>Not uploaded</li> </ul>	Conditional	Fully Executed Lead Paint Disclosure	Disclosure	Select. 🖤
Œ	Add new Custom Fold	er	Not uploaded	Conditional (1)	Fully Executed Seller's Disclosure Agreement	Disclosure	Select 💌
			Not uploaded	Required ()	Attorney Coorespondence	Other	Select.

- □ 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
  - $\hfill\square$  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
    - $\Box$  (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

Agent Name*		
Reese Cirino		XX
Agent Units*	Agent Gross	Commission*
1	\$12,500.0	00
	C Calculate	Commission
Associate Royalty		-\$750
	Rate	6.
	Split	100.
Company Commission		-\$3,750
	Split	30.
Additional Deductions		-\$0
E&O		\$0.0
KW Cares		\$0.0
KW Kids Can		\$0.0
BOLD Scholarship		\$0.0
Net to Agent		\$8,000.
Extra Payment Options		⊕ Add it
Referrals, Bonuses, Deductio	ons, Concessions	

Details	Seller Profile	Documents	Offers & Commissions	Notes 💿	Timeline
Offers & Commissions / Manage Comm	ission			Summary	( Open
				Total Commission	\$12,500.00
General Information			C Edit General Information	Pay to Office	\$4,500.00
				Associate Royalty	\$750.00
Sales Price	Commission Rate	Total Commission	Total Units	Company Commission	\$3,750.00
\$500,000.00	2.5%	\$12,500.00	1.0	Additional Deductions	\$0.00
Contract Date*	Closed Date*	DAID		Pay to Agents	\$8,000.00
03/25/21	10/14/21			Reese Cirino	\$8,000,00
Reese Cirino			🖉 Edit Agent Payment		
Agent Units	Agent Gross Commission	Net Pay to Agent			
1.0		Her ruy to Highlit	Payment date		
	\$12,500.00	\$8,000.00	Poyment date 10/14/21		
PAYMENT BREAKDOWN	\$12,500.00				
PAYMENT BREAKDOWN Agent Gross Commission	\$12,500.00				
	\$12.500.00	\$8.000.00			
Agent Gross Commission	\$12,500,00 Rote	\$8.000.00 \$12.500.00 -\$750.00 5.0%	10/14/21 Con: 13.000.00		
Agent Gross Commission		\$8,000,00 \$12,500,00 -\$750,00	10/14/21		

□ Next you would go to edit agent payment information

Edit Agent Payment		~	-
Agent Name*			
Reese Cirino		× •	
Agent Units*	Agent Gross Commissi	ion*	
1	\$12,500.00		
	C Calculate Commissio	on	
Associate Royalty		-\$750.00	
	Rate Split	6.0% 100.0%	
1			
Company Commission	Split	-\$3,750.00	
[	Space	-\$0.00	
Additional Deductions		-\$0.00	
E&O		\$0.00	
KW Cares		\$0.00	
KW Kids Can		\$0.00	
BOLD Scholarship		\$0.00	
Extra Payment Options Referrals, Bonuses, Deductions		Add item	
Cancel	Save Changes		
🗌 You can a	add charitable	e dona	tions
🗌 (List Side	): click add it	em ne	xt to payment options
🗌 Tr	nis is where y	/ou wil	choose bonus
	🗌 To put i	n the I	sting fee
🗌 Under Ex	tra Payment	Optior	IS :
	noose OUTS	IDE R	EFERRAI
	This is informa		you would put any outside referral
If you are co-listi	ng or have a	referra	I to someone in KWVSR
ent ( Add Another A	gent ) 🕀 Add	Co-Bro	ker Payment
☐ You are g	oing to click	add ag	lent

-	-	
Agent Name*		
Search		
Agent Units*	Agent Gross Commission*	
0	\$0.00	

- □ Type in their name
- $\hfill\square$  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

mmission Office Liste Royalty Joing Commission Joing Deductions Gents	\$750.00 \$3,750.00 \$0.00
ciate Royalty wany Commission Janal Deductions	\$3.750.00 \$0.00
any Commission Ional Deductions	\$750.00 \$3,750.00 \$0.00
ional Deductions	\$0.00
Agents	
	\$8,000.00
e Cirino	\$8,000.00
Submit	•
	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!

<u>4 Most Important Steps When Doing a Transaction in Command</u>
1. Choosing the correct opportunity type Initially

Create Opportunity			^
Market Center*		Team	
Ridgewood	-	Select a team	~
Opportunity Type*		Owner*	
Select Type	-	Reese Cirino	~
Client*		Co-Seller	
Kendra Cirino 🛛 🕹	~	Search	~
Opportunity Name*			
Custom tags			
Select togs			~
Estimated Closed Date			
Entimated Listian Drive		Commission Datat	
	ancel	Create	

## 2. Clicking Pick Checklist Type BEFORE Clicking Start a Transaction

command connect command	MC			6	🔔 📢 Reese Cirino 👻 🕜
Sales Pipeline / Listing (Cultivate)			Client Updates: Off	Client Upda	tes 🗈 Export Documents
8 Natalie Certosimo	istings				
Details	Seller Profile	Documents	Offers & Commissions	Notes 0	Timeline
Status: Select					$\phi^{\rho}$ Start a Transaction
Pick checklist type					
▼ Custom Folders		To start w	ork with opportunity please select checklist	t type first	
Add new Custom Folder					

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

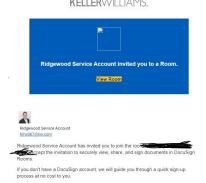
123 Main Street ID: #5922716 Created: 1	D/1/2021	
Documents v		• + :
Document   Create Envelope	Name (A-Z)  V Active Documents	•
		Select All
		ACTIONS
Kernel Instructions 10/1/2021	KW 887 - Permission to Advertise	
Reese Cirino Keller Williams Realty, Inc.	Reese Cirino Keller Williams Realty, Inc.	Reese Cirino Keller Williams Realty, Inc.

4. Choosing Pretagged Roles When Click Adding Recipients

FORM	FORM
KW 887 - Permissio : 1 Page Reese Cirino -	NJAR - Form 118, C : 13 Pages Reese Cirino -

## 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



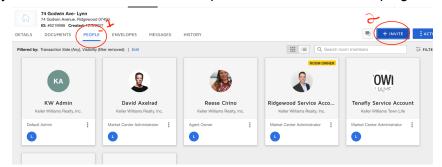
• Name the Opportunity For a listing (property address) for a buyer(buyer name)

• Make sure your documents are on ALL Documents



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- 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