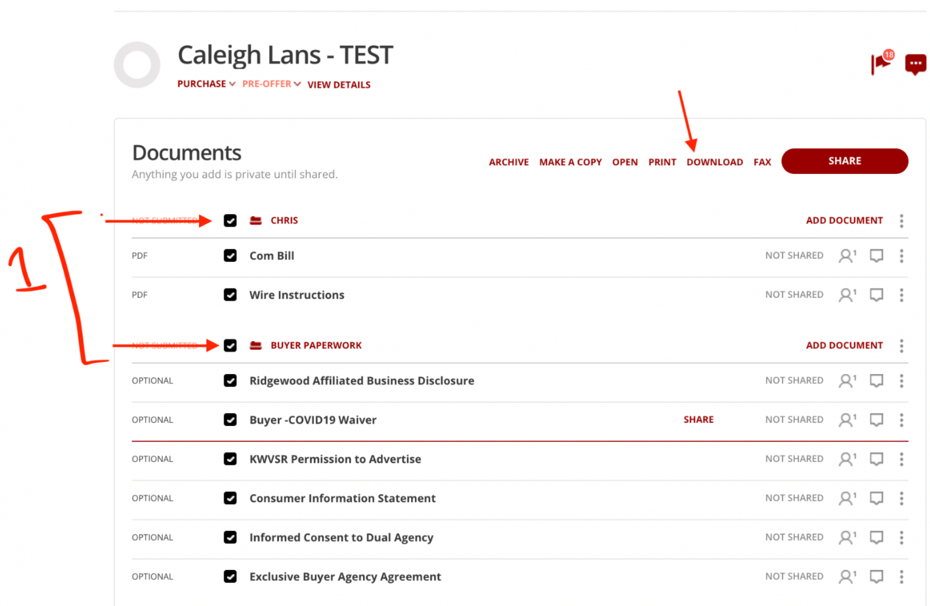
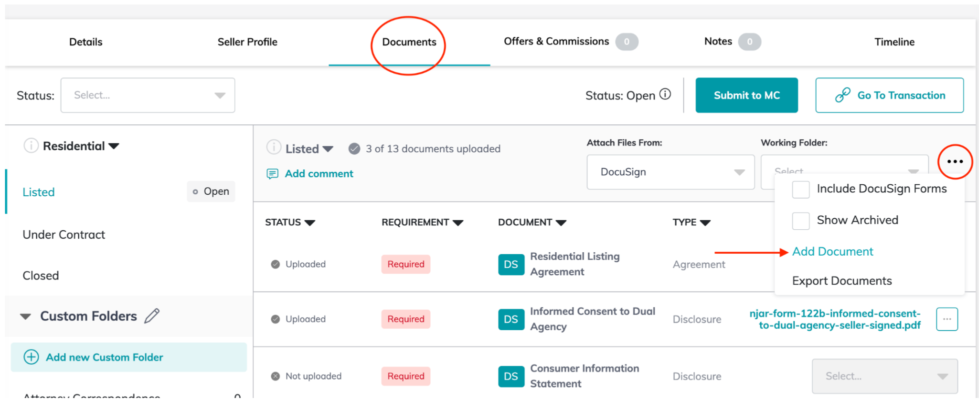
Your Walk- Through Guide to Setting Up DocuSign, Opportunities, Preparing Documents, Obtaining Signature,Compliance, and Commissions in Command.

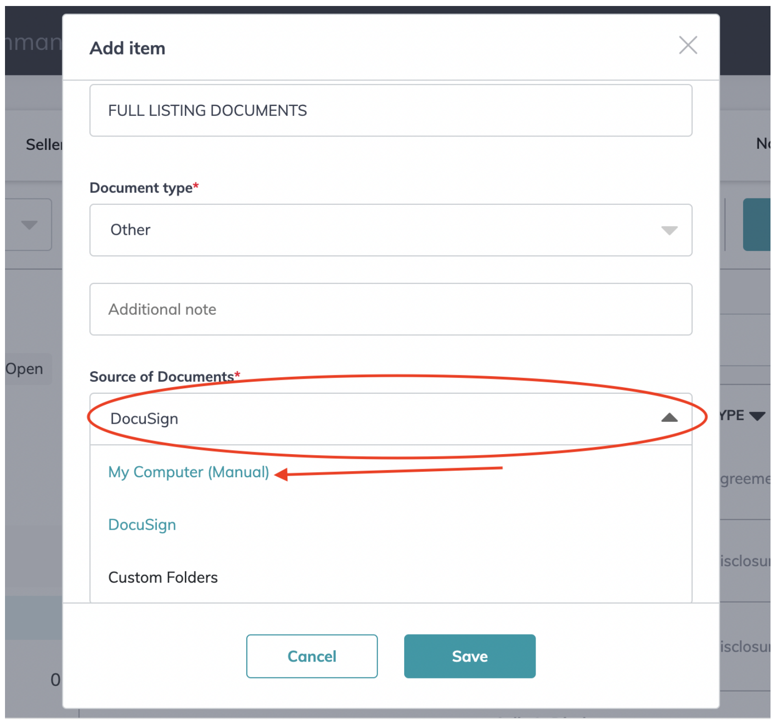
[Dotloop Transition Notes]

- 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

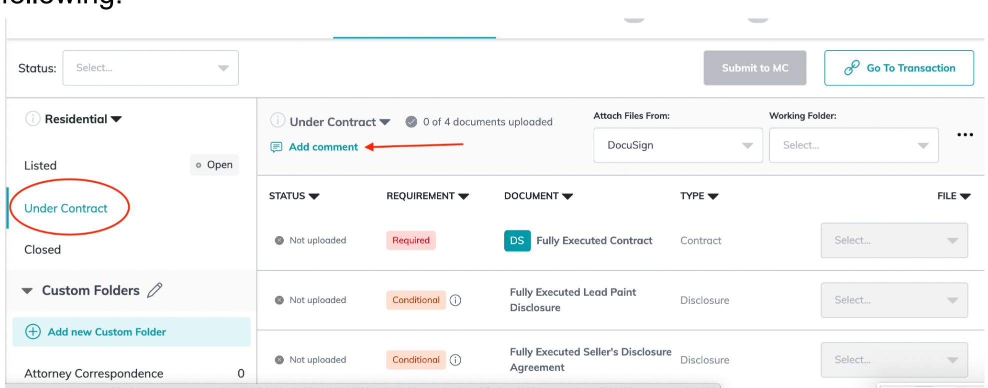


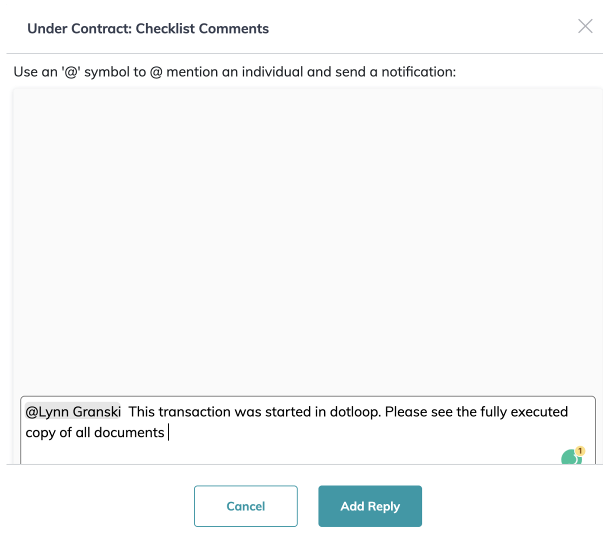
  - Once you have the downloaded PDF you can add all the documents to Your opportunity as ONE document

- 

- 

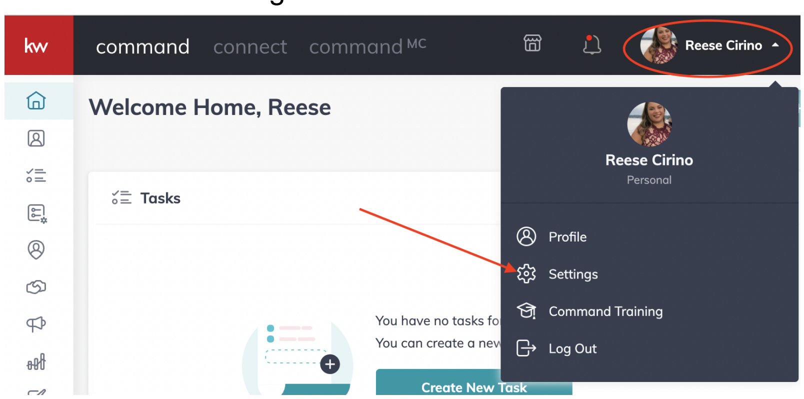
- Message Lynn when you go to submit for compliance and say the following:



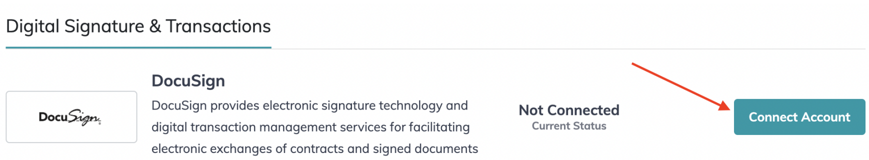


[Docusign Profile Set Up]

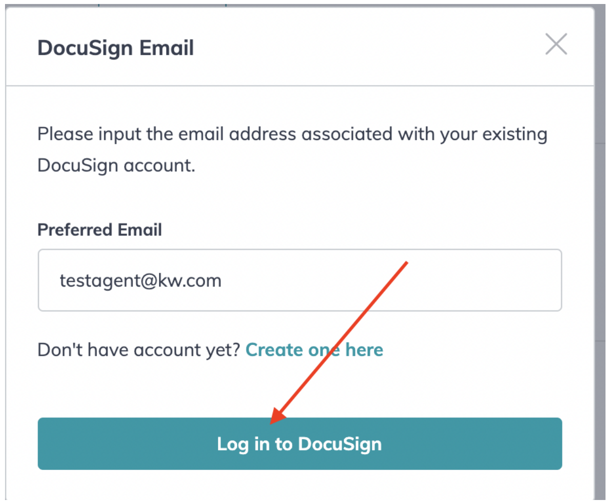
- ❏ Go into settings in command

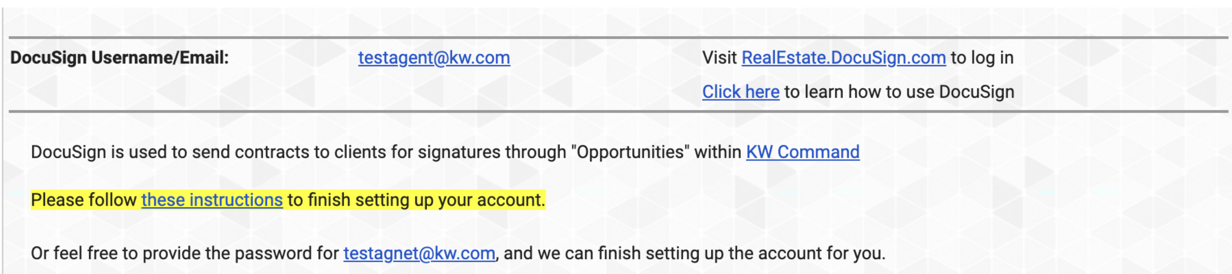


- ❏ Click connect account next to docusign

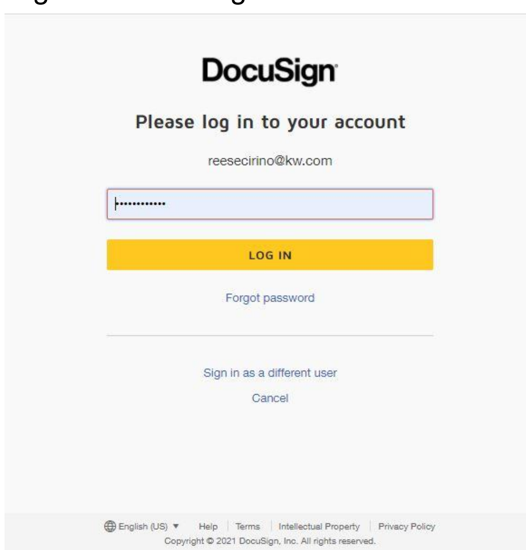


- ❏ **Option 1 : (if you received a password)** Sign In with the email given to you in Scott Leroy Password Sheet

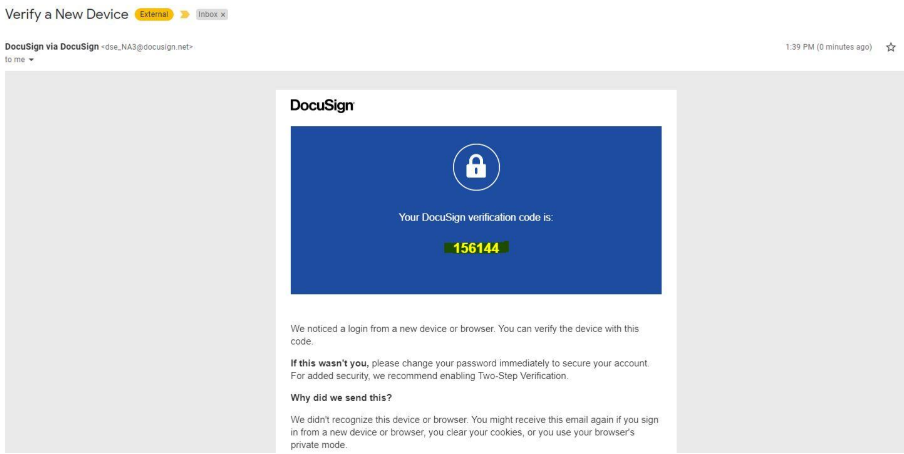




- ❏ Login with Docusign



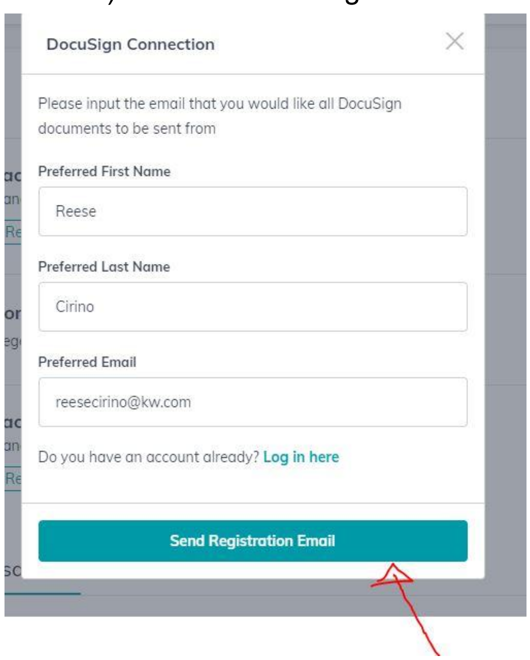
- ❏ Verification acceptance - Go into your email



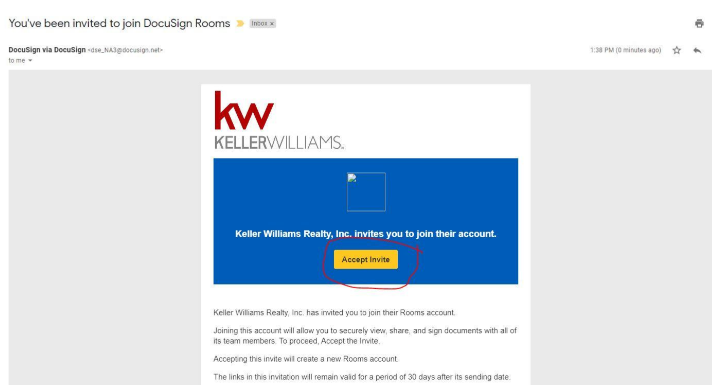
- ❑ Copy and paste code to DocuSign

❑ **Option 2: (if you have been with our office a while)**

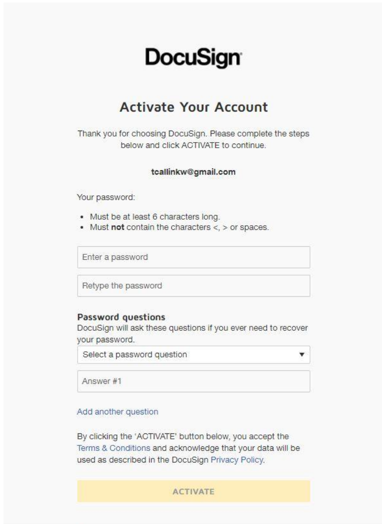
- ❑ Type in name and email (email cannot be associated with a previous DocuSign Account) and click send registration



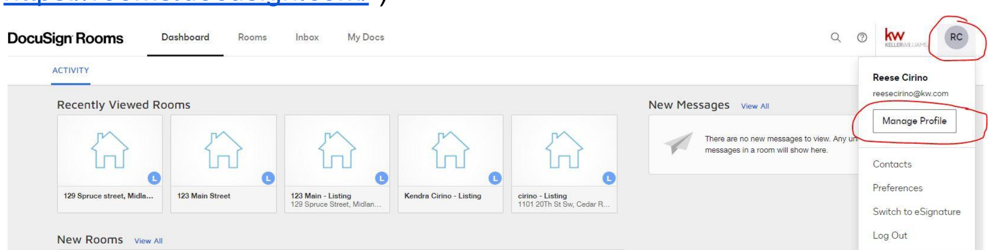
- ❑ Accept invite in your email



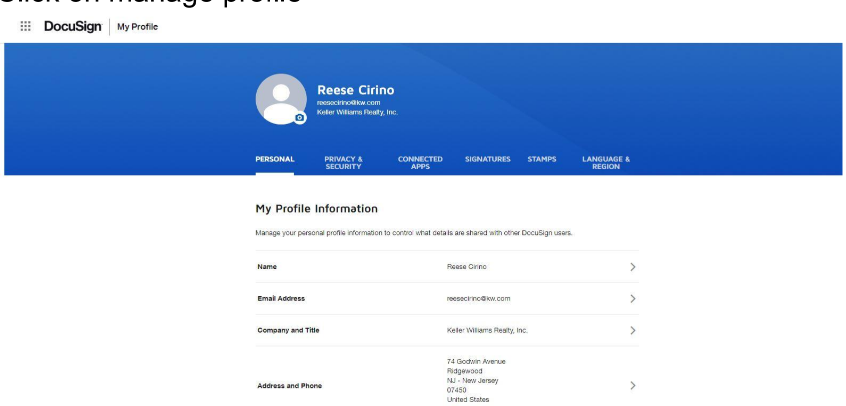
- [ ] Create password and security questions



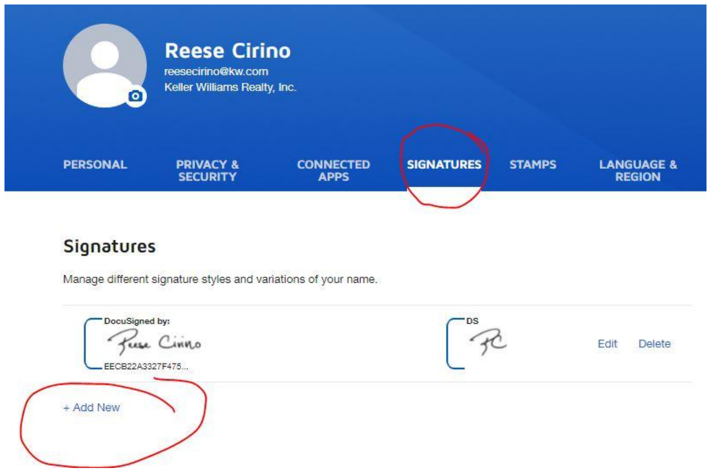
- [ ] Once set up in docusign (you can log into docusign by going to https://rooms.docusign.com/)



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



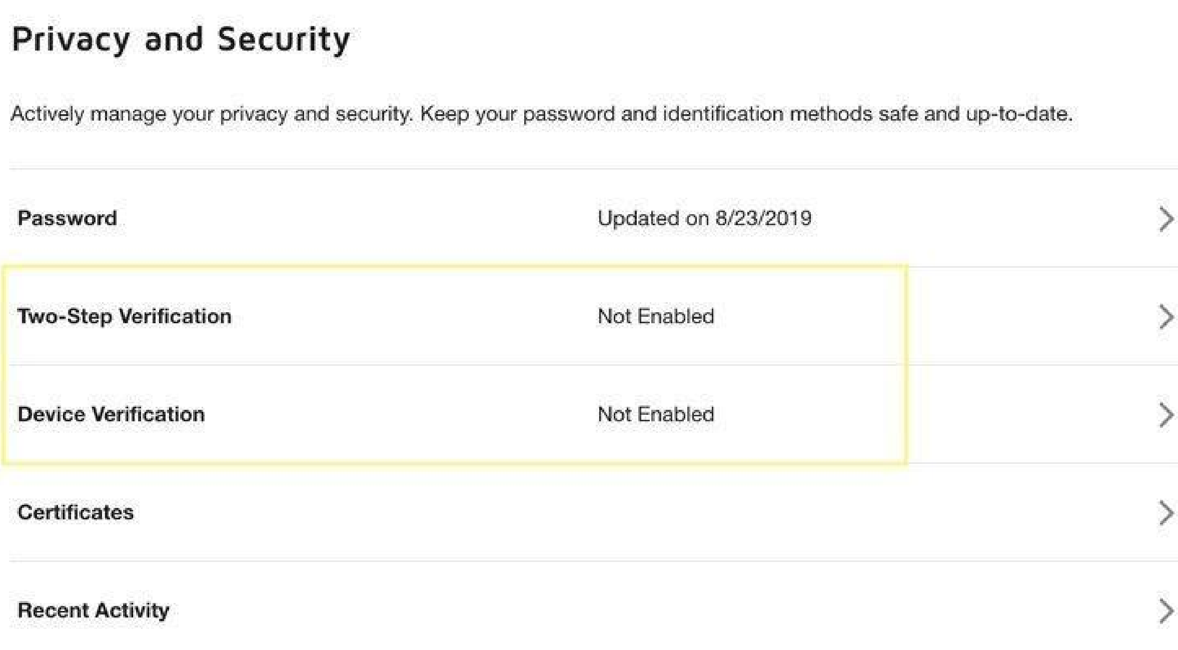
- [ ] Add your photo
- [ ] Make sure your contact information is correct
- [ ] Create your signature



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!

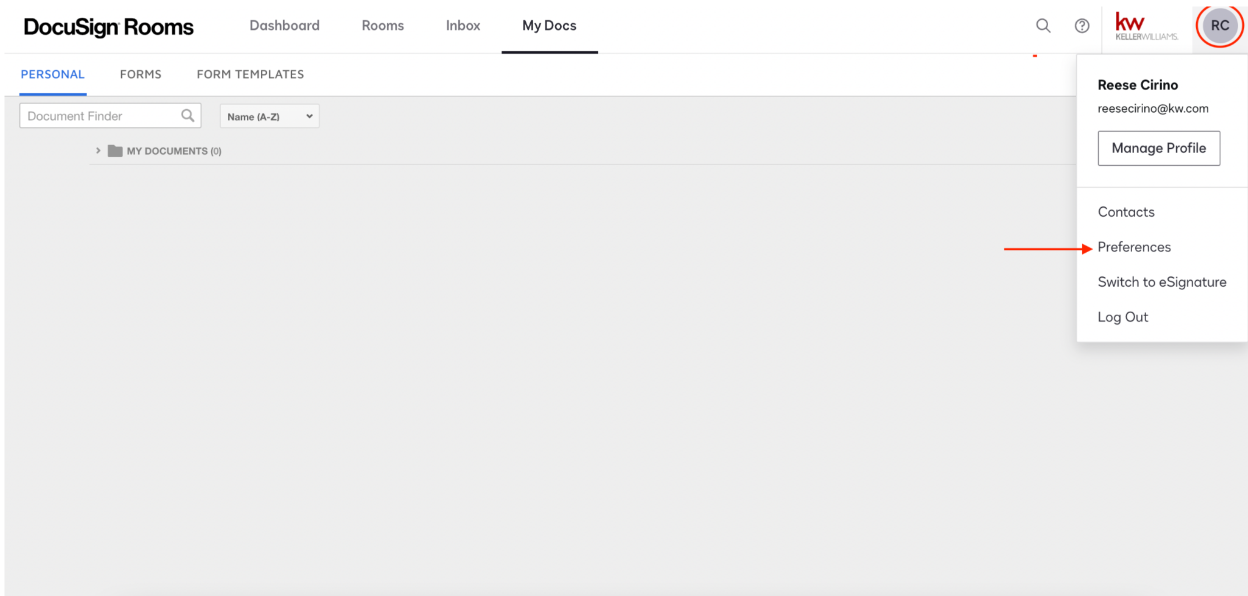
- Below is a screenshot of how that should look once both are disabled. Please just let us know once this has been completed. Thank you!



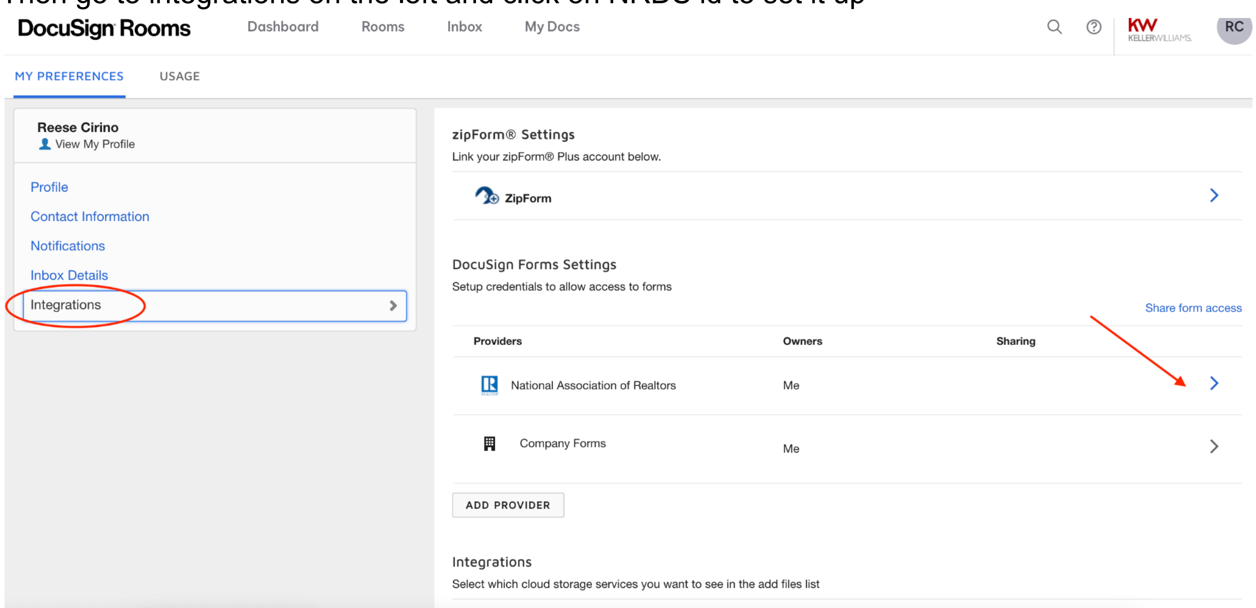
[Setting Up Your NRDS Number in DocuSign:](#)

- [ ] Go do https://rooms.docusign.com/mydocs

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



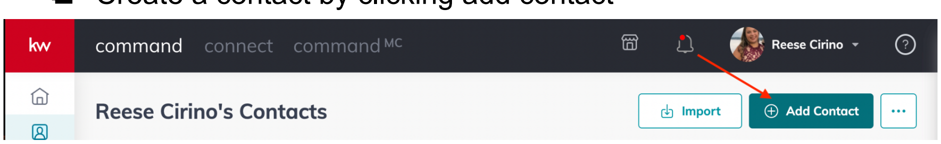
- [ ] Then go to integrations on the left and click on NRDS id to set it up



- [ ] 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

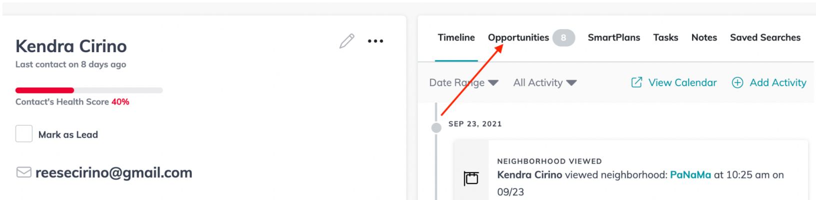
Starting a Transaction:

- [ ] Create a contact by clicking add contact

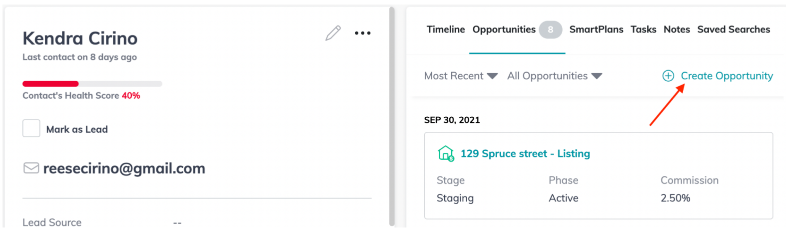


- [ ] Click on that contact

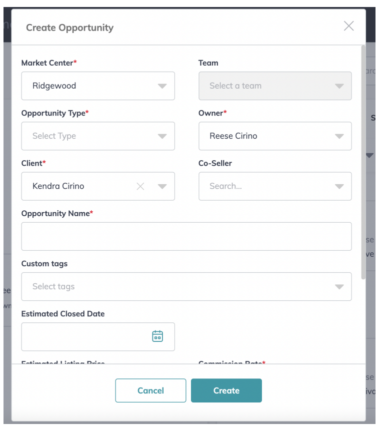
- [ ] Go to opportunities on the right side



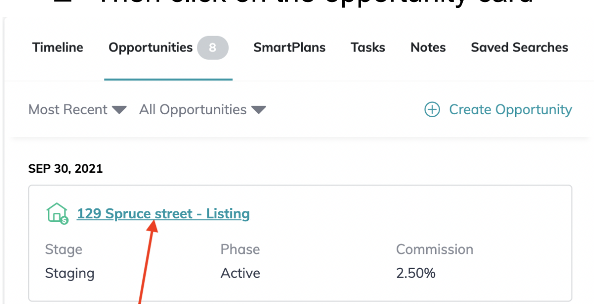
- [ ] Click create an opportunity



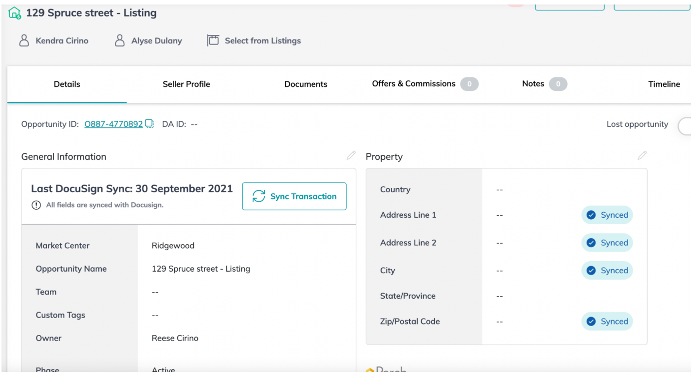
- [ ] Fill the information in



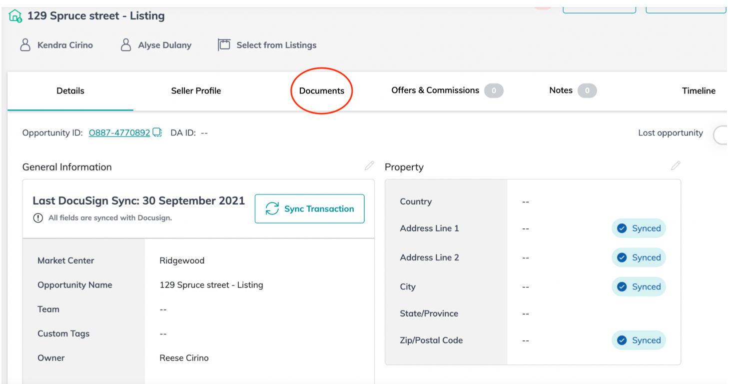
- [ ] Then click on the opportunity card



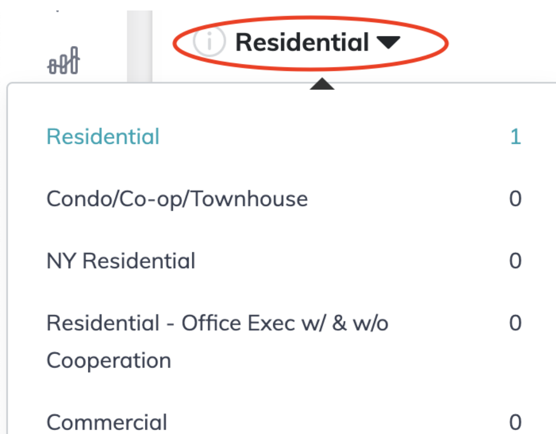
- [ ] Go into details



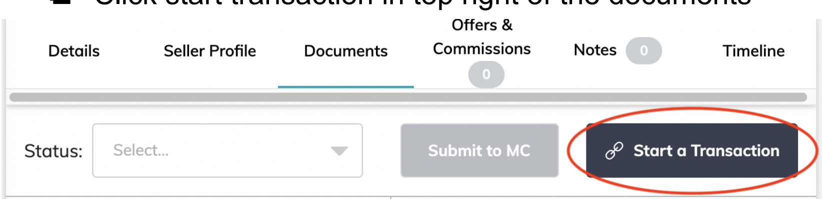
- ❑ Change property address name in details
- ❑ Go to documents



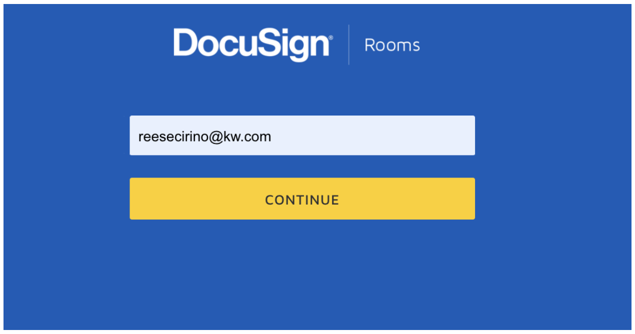
- ❑ Choose the correct checklist on the left hand side



- ❑ Click start transaction in top right of the documents



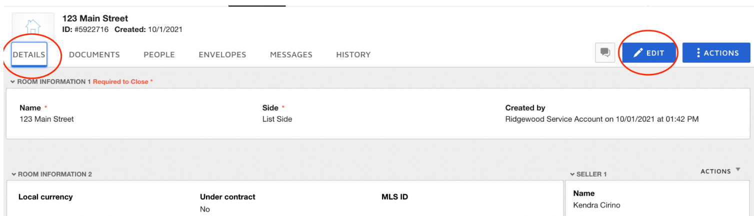
- ❑ Login with your DocuSign email and password



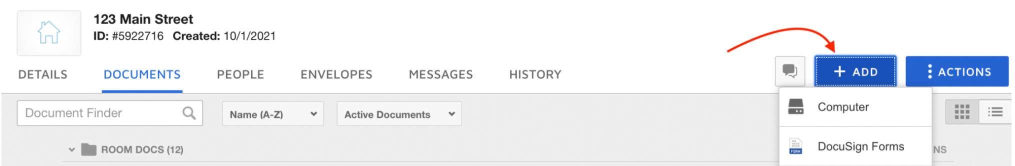
- ❑ this will populate all documents from documents to docusign

Once in DocuSign:

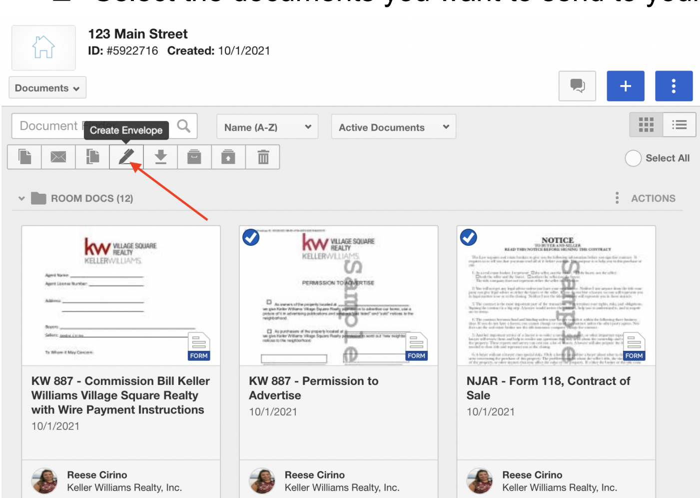
- ❑ Fill out details section



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

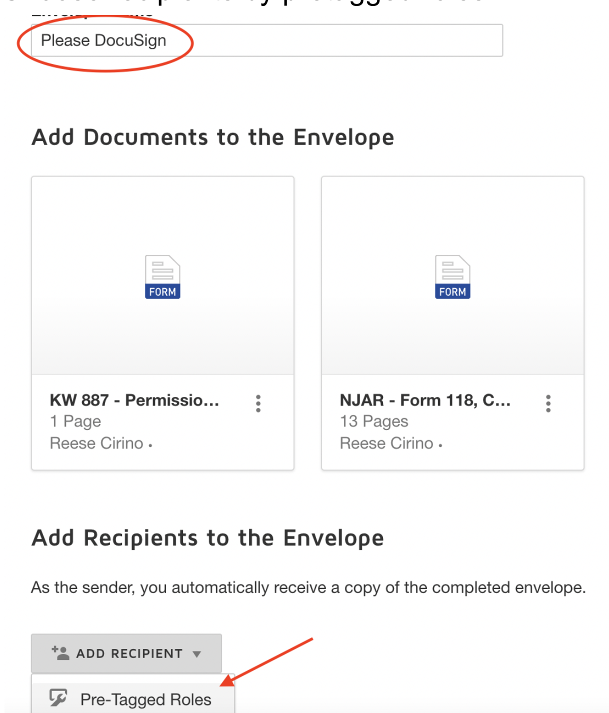


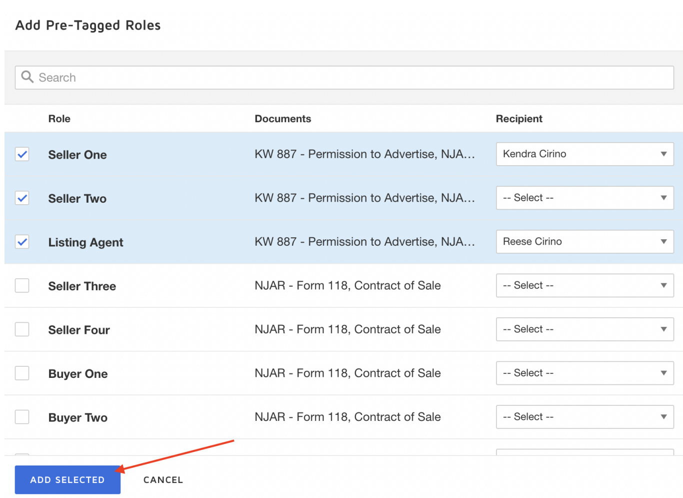
  - ❑ Add document
  - ❑ Choose docusign forms (for in house forms)
  - ❑ Choose computer for additional PDF documents that may need to be signed (example: Buy Side LP/SD)
- ❑ Select the documents you want to send to your client

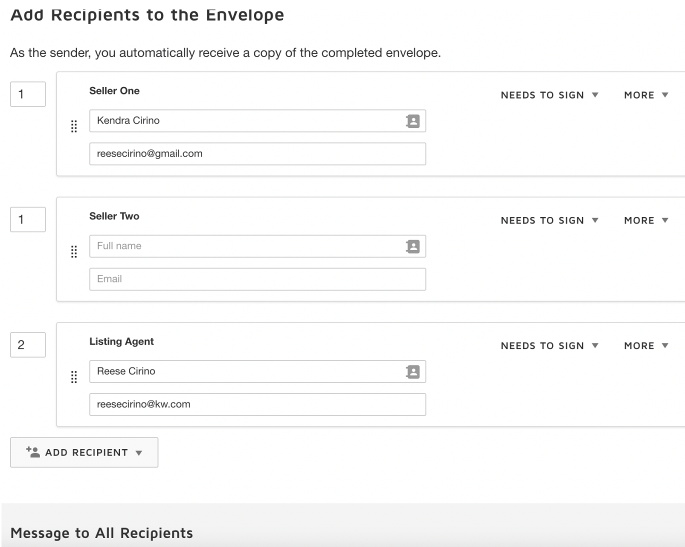


- ❑ Create an envelope

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

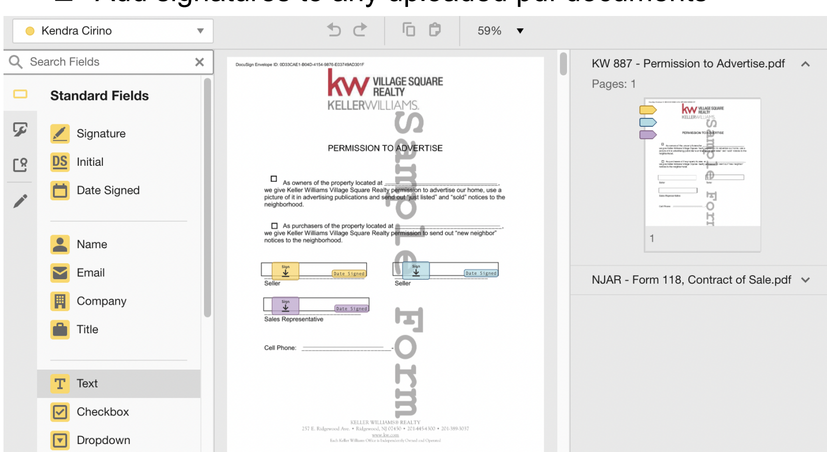






- ❏ and recipient order
  - ❏ 1. Your clients
  - ❏ 2. Yourself
- ❏ Change Message to All Recipients
- ❏ Click next in top right

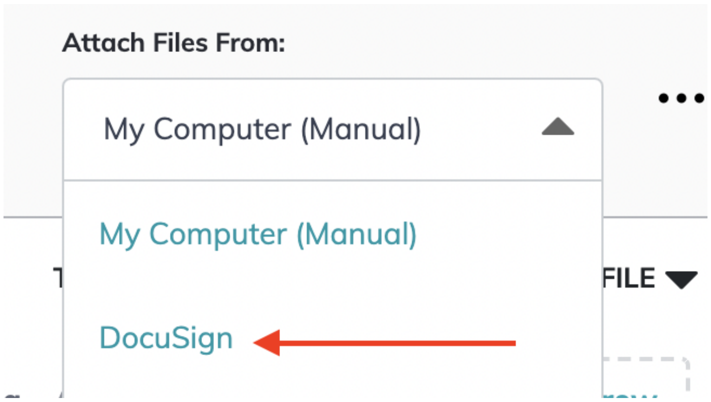
- ❏ Prepare any last minute additional add ins in all documents
- ❏ Make sure everyone's signatures are correct
- ❏ Add signatures to any uploaded pdf documents



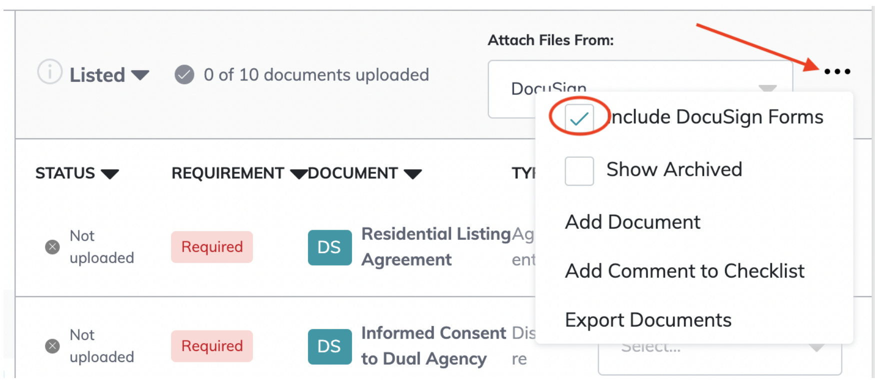
- ❏ Once done click send

Once Documents are signed by ALL parties:

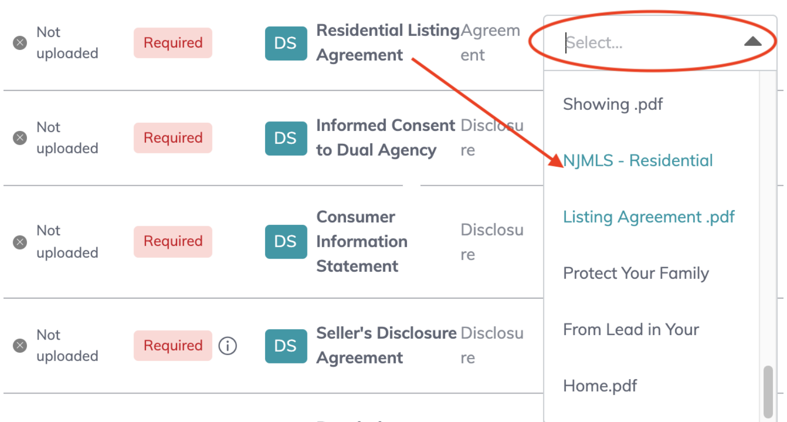
- ☐ Go into documents in your opportunity



- ☐ Change attach files to DocuSign

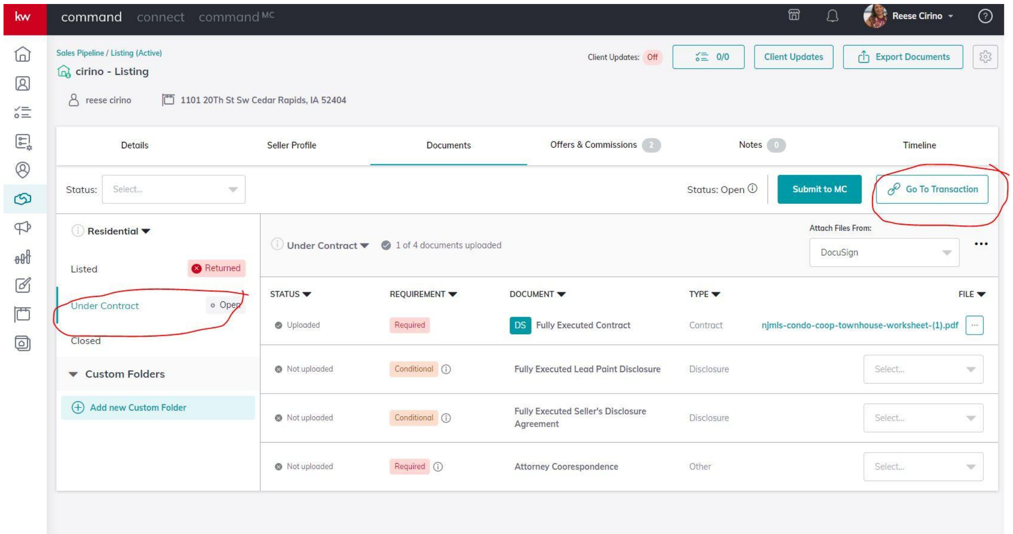


- ☐ Click the three dots and choose include DocuSign forms

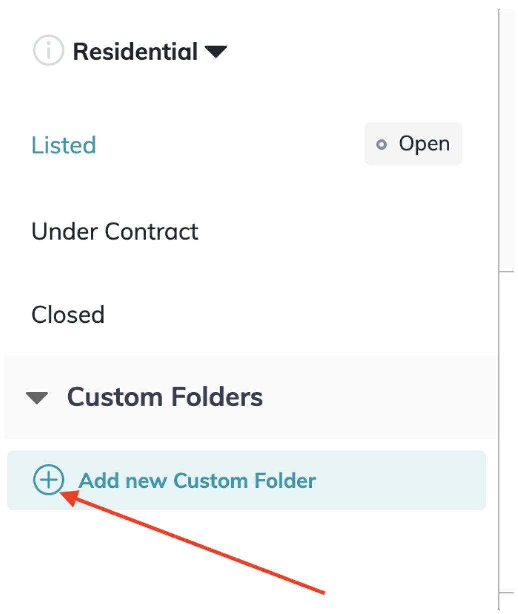


- ☐ Assign the correct documents to its placeholder
- ☐ Submit to MC
- ☐ Once compliance has been approved and signed by sally you will get an email (Listing)
- ☐ **REMEMBER FOR LISTINGS NO LISTING CAN GO LIVE UNTIL ALL DOCUMENTS HAVE BEEN APPROVED IN ADDITION TO SALLY'S SIGNATURE**
- ☐ If your opportunity is returned once you add/correct the document you will click resubmit for Sally to approve

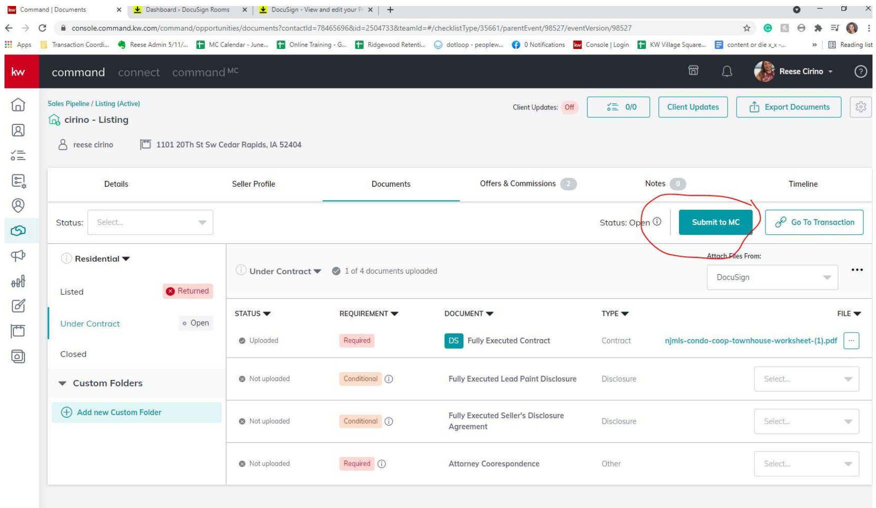
Once Under Contract:



- [ ] 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



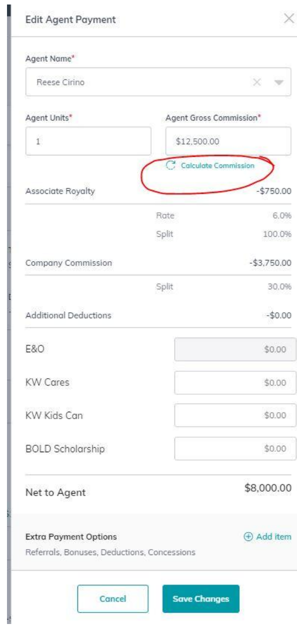
- [ ] After the inspection has been completed submit under contract folder to MC

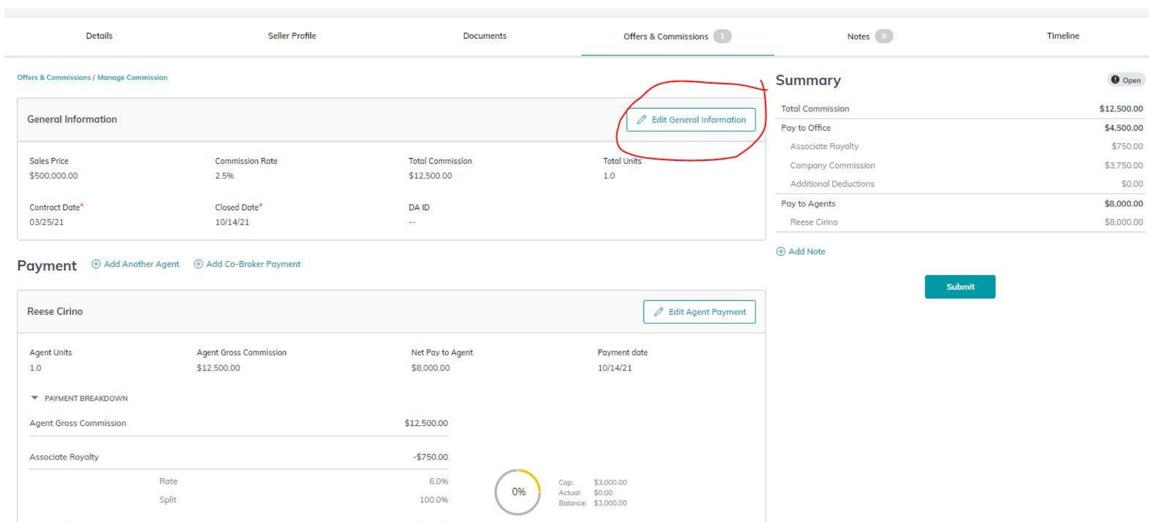


- ☐ If your opportunity is returned once you add/correct the document you will click resubmit for Lynn to approve
- ☐ Submit your commissions in command

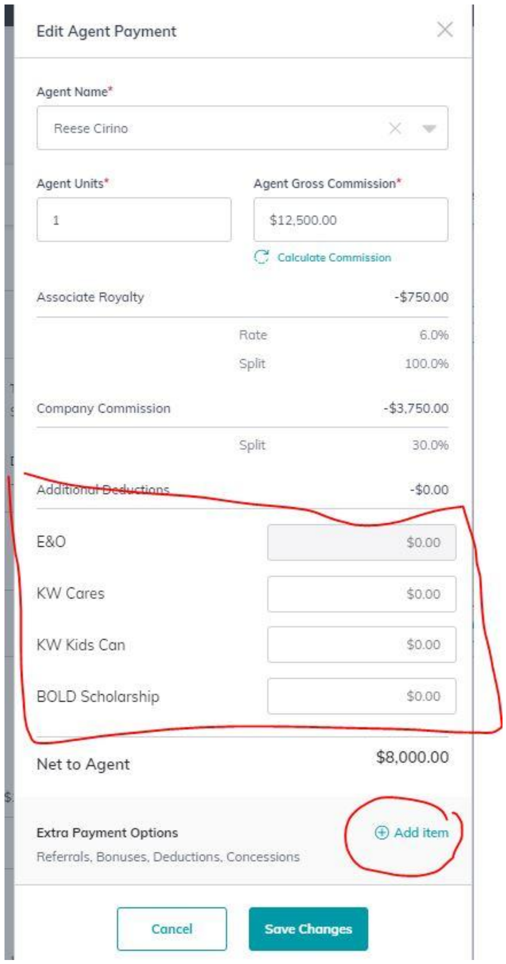
[Commissions in Command(Getting Paid!)]

- ☐ [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



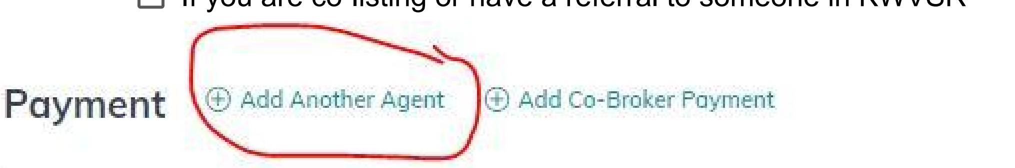


☐ Next you would go to edit agent payment information

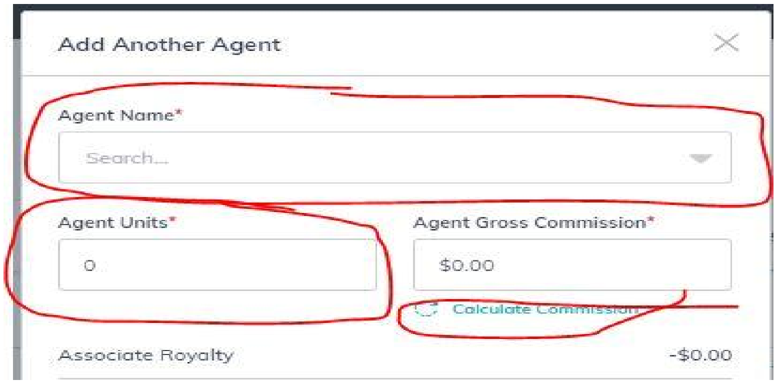


- ☐ You can add charitable donations
- ☐ (List Side): click add item next to payment options
  - ☐ This is where you will choose bonus
    - ☐ To put in the listing fee
- ☐ Under Extra Payment Options :
  - ☐ Choose OUTSIDE REFERRAI
    - ☐ This is where you would put any outside referral information

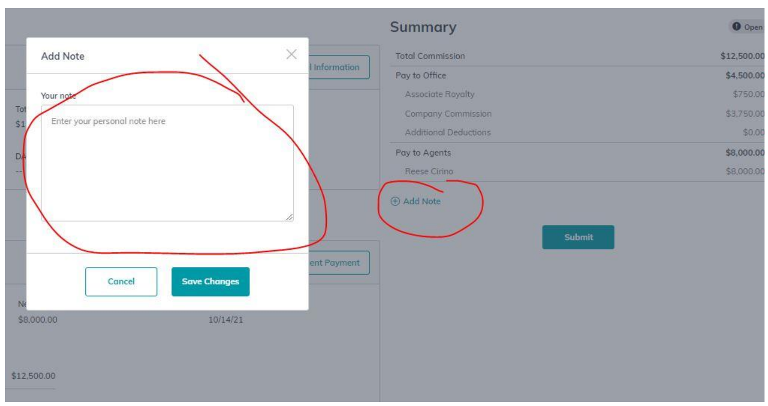
☐ If you are co-listing or have a referral to someone in KWVSR



- ☐ You are going to click add agent



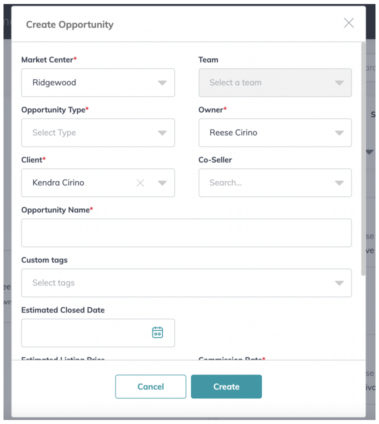
- [ ] Type in their name
- [ ] Add the unit they will be getting
- [ ] Then click calculate commissions to automatically calculate the commission from gross commission
- [ ] Once you have updated all information before clicking submit



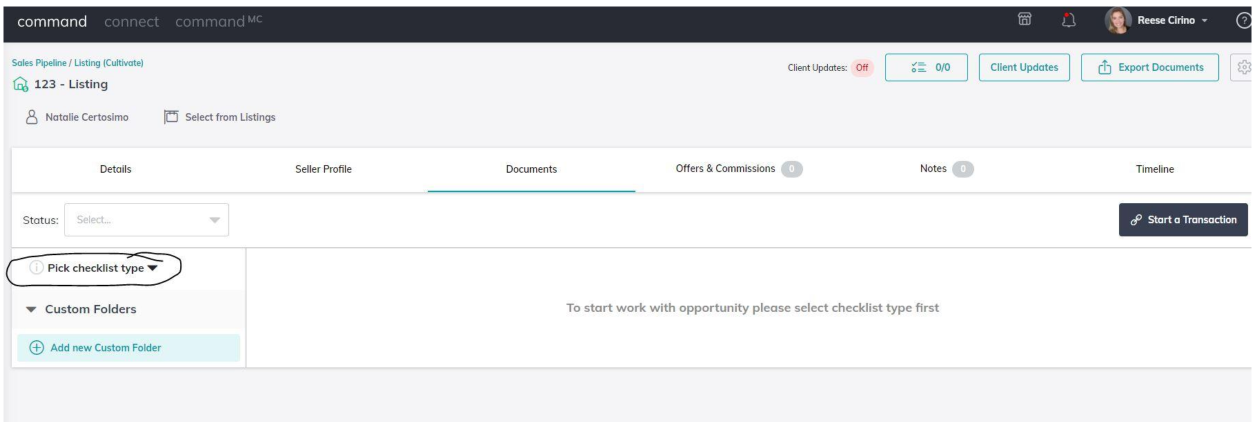
- [ ] Add any information you may want Lynn To know!
    - [ ] Examples
        - [ ] Referral agent company and the referral amount
        - [ ] Dual agency (whether with yourself or another agent)
        - [ ] If the date is still a little unsure
- [ ] Then you click submit
    - [ ] You will get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

[4 Most Important Steps When Doing a Transaction in Command]

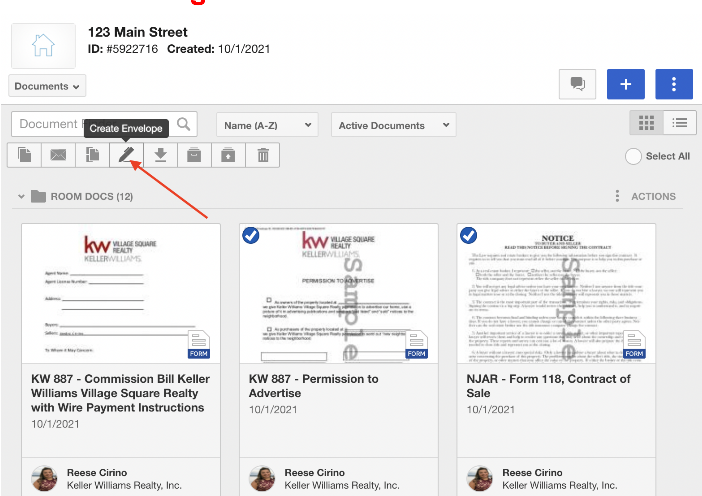
1. **Choosing the correct opportunity type Initially**



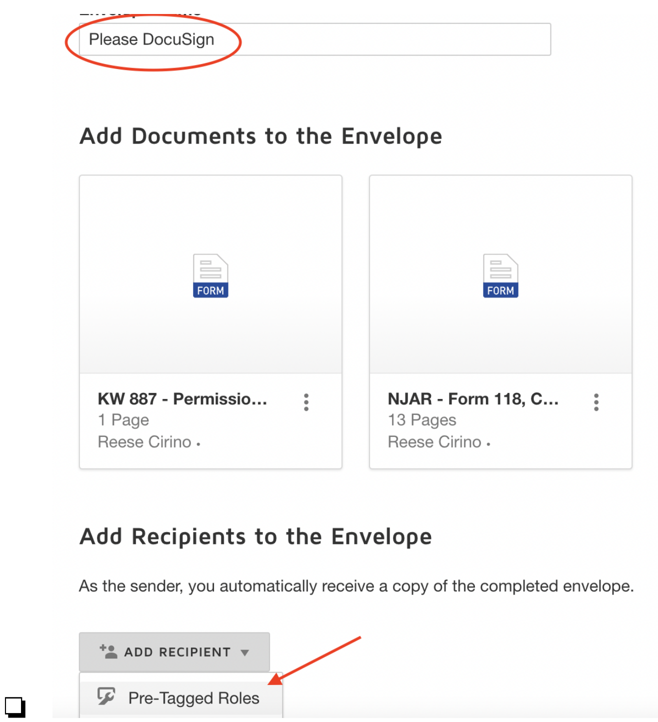
2. Clicking Pick Checklist Type BEFORE Clicking Start a Transaction



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

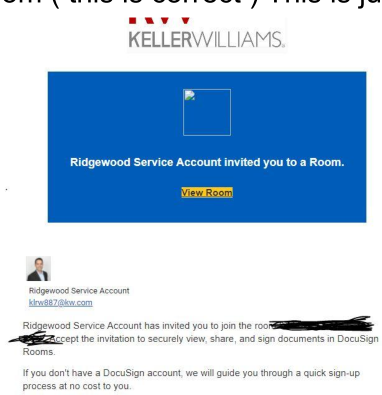


4. Choosing Pretagged Roles When Click Adding Recipients

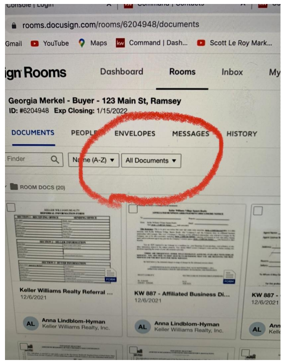


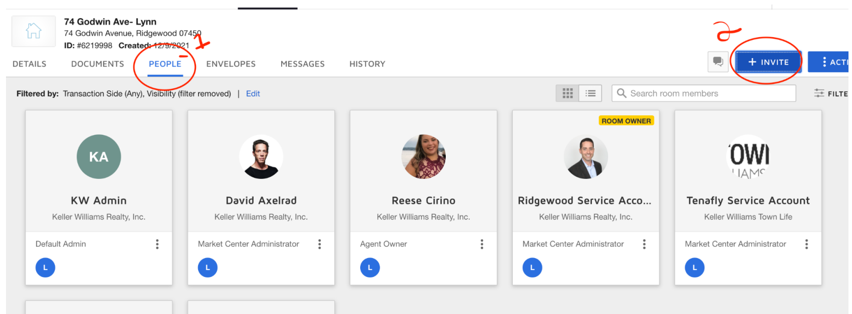
Additional Things to Note

- 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