DocuSign Cheat Sheet

VOLUME I

Your Guide to Using KW Rooms DocuSign

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Note: The DocuSign account *must* be created from the Command settings to be compatible with Command

1. Click your name on the top right of Command
2. Settings
3. Click 'Connect Account' to the right of DocuSign
4. Check the Preferred Email field and click 'Send Registration Email'
5. A banner should appear in Command, confirming the email was sent. Navigate to your email inbox to locate the DocuSign Invitation email sent from dse_NA3@docusign.net > Click the Accept the Invitation from that email
6. Follow the prompts to set your DocuSign password and set the security question
7. Accept the DocuSign terms and conditions
8. This should reroute you to your DocuSign Rooms homescreen, where you will see a pop up box to select "Authorize"
9. This will take you to the Command settings where you can click 'Authorize' next to DocuSign
10. Enter your DocuSign login/password to complete

Linking an Existing KW DocuSign Account to Command

Note: Previously created, non-KW DocuSign accounts cannot be used with Command. We'd recommend using your KW email address to set up the KW DocuSign account right away! (Steps above) If you have a KW DocuSign account, that can be linked to Command with these steps:

1. Click your name on the top right of Command
2. Settings
3. Click 'Connect Account' to the right of DocuSign
4. Click 'Log in here' in small blue font
5. Check the email address in the field and click 'Log in to DocuSign'
6. Add your DocuSign password > Login

Start a Transaction and DocuSign Room

1. Add your client's contact information to your Command database
2. Use the search bar on the top left of your database to search the contact name and click to open
3. Click 'Opportunities' on the top right white toolbar
4. Click "Create Opportunity" and fill in fields marked with * > Select the 'Create' button (Click here for more detailed steps on creating your Opportunity.)

5. Select the Opportunity name to open it
6. Click the 'Documents' option on the white toolbar
7. Click 'Pick Checklist Type' on the left side to select compliance checklist and allow required forms to automatically pull into your DocuSign Room. Further info on this new feature here.
8. Select 'Start a Transaction'
9. Enter your DocuSign login/password to finish creating your DocuSign Room

Access the DocuSign Room *After* it has been Created

Important: It is essential that you initially start the DocuSign Room directly from the Command Opportunity with the steps in the above section. This will allow Command and DocuSign to work together to manage your transaction. Once the DocuSign Room is already created, you can go to rooms.docusign.com to login, to access your Room right away! You can also access the DocuSign Room directly from Command with these steps:

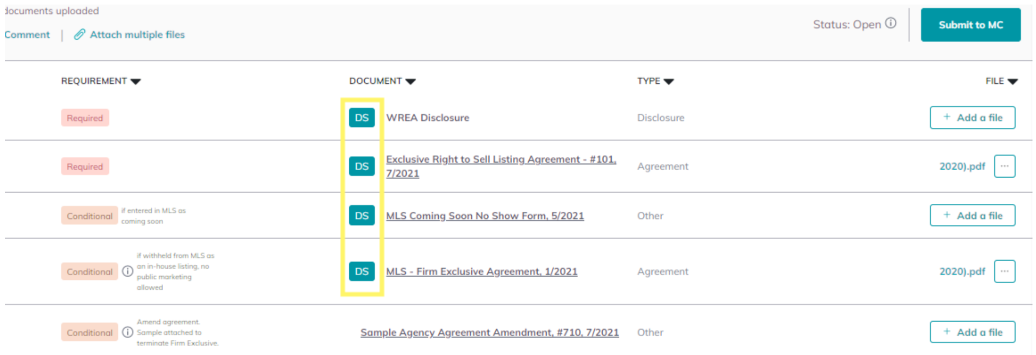
1. Open the Opportunity in Command
2. Select the 'Documents' tab on the white toolbar
3. Select 'Go to Transaction'

Automatically Add Forms to your DocuSign Room

A brand new feature has launched to allow agents to automatically add required forms to your Room upon creation. There is a very specific workflow that is required to allow forms to automatically pull into your DocuSign Room. Note: This feature will only be available *if your market center staff* has set this up on the Office Admin Side. Steps for Office Staff to Set this up for your agents.

Below is the specific workflow required to pull required forms into your Room automatically:

1. Create your Opportunity in Command
2. Click the Opportunity name to open it and select the 'Documents' tab on the white toolbar
3. On the left, select 'Pick Checklist Type' (Note: if your market center only has one checklist created, you may instead see the checklist name on the left side (This will depend on your Office's compliance process).
4. You may see additional folders appear on the left side for Listed, Under Contract and Closed checklists. **Forms that will automatically pull into DocuSign are marked with a teal DS** (screenshot below).



5. Click ‘Start a Transaction’ on the top right to pull the forms marked with DS automatically into your Room! Note: This will only work when starting your DocuSign Room initially.

Access Forms

Your interactive board forms should be accessed through DocuSign at rooms.docusign.com. You will need to pull the forms into your DocuSign Room to have full access to edit, print or send for e-signature. To add forms to your DocuSign Room:

1. Open your DocuSign Room and select the ‘Documents’ tab on the Room toolbar
2. Click ‘Add’
3. Select ‘DocuSign Forms’
4. On the left side you should see your form ‘Groups’ and ‘Libraries’ to select and search for the form (**Note:** If you are prompted to enter your NRDS ID for verification, you can click skip this step to see if your forms are already in your Library, if not, see the section below).
5. Click the checkbox next to the form(s)
6. Add Selected

   Note: If your forms are not in DocuSign, when following the above steps, your NRDS ID or zipForm account may need to be linked to the DocuSign preferences. See the sections below.

If your forms *are available* in DocuSign, click here to skip to the next section.

My Forms are Not in DocuSign

Depending on your area, your Real Estate Board may provide your forms in different ways. We are seeing many states/boards allow their forms to be accessed in DocuSign, by linking the agent’s NRDS ID to the DocuSign Preferences. Click here to see if your state/board provides access to forms with your NRDS ID. If so, click here for steps on how to link your NRDS ID to DocuSign for access to your forms immediately!

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If your state or board does not provide access to your forms via your NRDS ID, your forms may be provided through a different source. Your office staff will be best to advise you on how those are accessed. Many boards also provide zipForm accounts for agents to access forms. Below please find steps on how to link your zipForm account to DocuSign.

Link NRDS ID to DocuSign

1. From rooms.docusign.com, select your headshot/initials on the top right
2. Select ‘Preferences’
3. On the left side menu, click ‘Integrations’
4. Under ‘DocuSign Forms Settings’, click ‘Add Provider’
5. Select the ‘REALTOR’ option
6. In the pop up that displays, Add your NRDS ID and select your Association from the dropdown. Click here to check if your association is available.

Link zipForms to DocuSign

1. From rooms.docusign.com, select your headshot/initials on the top right
2. Select ‘Preferences’
3. On the right, click ‘Integrations’
4. Under zipForm Settings, click the arrow to the far left of the ZipForm option to add your username and password > Save Changes

Access zipForms in DocuSign

From what we've seen, zipForms must be accessed and edited in the zipForm platform directly. Once the forms are edited in zipForm, you would be able to pull the forms into DocuSign to send for e-signatures. To do this:

1. Select the Documents tab of your DocuSign Room
2. Click 'Add' on the top right > zipForm
3. From the pop-up, you will be able to select to add the forms from the ZipForms Library or Linked Transaction
4. This will allow you to select the forms from the list > Add

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Print Forms from DocuSign

To print forms from DocuSign, you will first need to pull the form into your DocuSign Room.

1. Open your DocuSign Room
2. Select the ‘Documents’ tab > Click ‘Add’ on the top right
3. Select the forms > Add Selected

4. Click to open the form in your Room > Edit the form, as needed
5. Select 'Save & Close' to save before printing, then click to re-open the form
6. Select the icon of a folded sheet of paper on the top right > Print

Edit Interactive Forms in DocuSign

Interactive forms are forms in DocuSign that are automatically fillable. These forms are noted with a blue 'forms' icon and can be added to your Room with these steps. To edit these forms:

1. In the 'Documents' tab of your DocuSign Room, click the form to open it
2. Simply click the fields on the form to fill in any text boxes, checkboxes or radio buttons
   - Please note: initial/signature fields will not display until the form is pulled into the Envelope.
3. Click 'Save & Close' on the top right

Send Forms for e-Signatures

1. Once you have edited the forms, with the steps in the above section, click the 'Envelopes' tab on the Room toolbar
2. Click 'New'
3. Under 'Add Documents to the Envelope' click the 'Room Docs' button, to select the edited forms from your Room > Add Selected
4. Click 'Add Recipients' > Pre-Tagged Roles, to select your clients from the dropdowns, to assign them to the appropriate roles i.e. seller one, seller two, buyer one, buyer two, etc.
5. Click 'Next' on the top right
6. If you are working with an interactive form, you will see the initial/signature fields display automatically. You can add additional fields from the left side panel. Please note: the color of the field corresponds to the color of the client's dot in the top left dropdown menu.
7. (Optional) Select the 'Recipient Preview' option on the top right, to view the form from the client's perspective, to verify they can sign correctly
8. Click 'Send' on the top right

Upload a PDF to get Signed

1. From your DocuSign Room, click the 'Envelopes' tab
2. Click 'New' on the top right
3. Under 'Add Documents to the Envelope' Click 'More' > Upload
4. Browse your computer for the desired PDF and double click to add
5. Click the 'Add Recipients' button > Room Participants > Select the checkbox next to the Recipient names > Add Selected
6. Click 'Next' on the top right

Edit the PDF for Signing

1. From the above steps, on the left side, you will see Fields that can be added to edit the PDF **Note:** The drop down on the top left, indicating the recipient names with their associated color. When selecting the client name from the drop down, you will notice the fields below turn to that color, indicating the fields will be associated with that client.
2. Click the field on the left side, that you'd like to add
3. Click the desired spot on the form to drop the field

Note: When working with interactive forms (forms that are automatically fillable), initial and signature fields will automatically display on the form, once the form is pulled into the Envelope. Whereas, if you are working with a PDF, you will need to manually add the initial and signature fields for your clients to sign.

Add Fields to the PDF to Fill as the Agent

1. On the left side gray toolbar, select the bottom pencil icon, labeled 'Pre-Fill Tools"
2. Select the option to add a text box, checkbox, radio button or line, to complete as the agent
   Note: When dropping a **text field** to your form, if the field appears as a solid color (i.e. solid yellow or solid blue, etc. **-** associated with the client color on the top left drop down), it will require your client to fill that in. If it is a field you need to fill in as the agent, use the above two steps to lay the agent fields instead.
3. If adding signature fields to the form, make sure to add the 'Date' field as well, for the date to automatically appear for clients when signing

Sign as the Agent

If this is a form that you will need to sign as the agent, make sure to add yourself as a Recipient in the Envelope, when sending the form for e-signatures. Once the form is sent in the Envelope, you will receive an email from DocuSign, prompting you to sign. Alternatively, you can sign the form directly from DocuSign with these steps:

1. From the DocuSign Room, select 'Envelopes' on the Room toolbar
2. Click the Envelope to open
3. If the Envelope contains a form you need to sign, you will be given the option to select 'Sign Now'
4. Follow the prompts to sign the form

How Signed Forms Work in DocuSign

The fully signed form *will not* show in your DocuSign Room *until all parties have signed*. You will receive an email notification each time a client signs, with the signed form attached. However, you will not be able to view the signed form in your Room, until all recipients have signed/completed their action.

When working with interactive forms (forms that are automatically fillable) in DocuSign, initial and signature fields will automatically display on the form, once the form is pulled into the Envelope. Whereas, if you are working with a PDF, you will need to manually add the initial and signature fields for your clients to sign. When the form comes back signed, it will come back as a totally separate PDF, to preserve your client's signatures. So in your DocuSign Room, you will have two versions of the form - (1) the original fillable version, notated by a blue 'forms' icon, and (2) the signed PDF version of the form, notated by the green 'signed' icon.

Edit Signed Forms in DocuSign

Note: Please check with your Supervising Broker for any compliance requirements for editing signed forms in your area. Your Broker will be able to verify which best practice they prefer you use. In some areas, you may be required to use an addendum to make changes to a fully signed form.

To edit a previously signed form, first pull the form into an Envelope:

1. Open your DocuSign Room to select the 'Documents' tab
2. Hover your mouse over the signed copy of the form, notated with a green 'signed' icon, to check the form in the top left corner
3. Select the pen icon that displays on the gray bulk action toolbar to 'Create Envelope'
4. Click 'Add Recipients' > Room Participant > to select the participants > Add Selected
5. Click 'Next' on the top right

Add fields on the left side panel, to begin editing.

1. Note the drop down menu on the top left, showing your clients' names with an associated color. Notice when you change the client name, the fields below all change to that color. Select client name.
2. Select the field from the left side panel to add text fields, checkboxes, initial and signature fields, etc. > Click the spot on the form to lay field
    - If this is a field you need to fill as the agent: Select the pencil icon on the left gray toolbar, to use these fields instead
3. Select 'Recipient Preview' on the top right to check over the form from each clients' perspective
4. Send

Notes:

(1) Typically any changes made to an executed form would need to be initialed by all parties. Again, please check with your Supervising Broker for best practices to ensure you are in compliance with your Board.

(2) You will not see the fields added to the signed form in the 'Documents' tab of your Room until *all parties have signed.*

[Click here](#) for a quick video overview of working with signed forms in DocuSign.

ReSend Form to Remind Client to Sign

Since signed forms will not display in your DocuSign Room until *all parties have signed*, you can reshare the form to the client(s) who have not signed yet, to help remind them to sign. This will only reshare to clients who have not already completed their signing action. To do this:

1. Open the DocuSign Room and select the 'Envelopes' tab
2. Click on the Envelope, which will have the status 'Waiting for Others'
3. Click 'Resend'

Create and Apply Templates

Templates can be created in DocuSign using either the DocuSign Interactive (fillable) Forms or PDFs.

Create Templates from DocuSign Forms

You are able to create templates using the DocuSign Interactive Forms, to prefill data on the form; allowing you to add the pre-filled template to your DocuSign Room to save you time. To set this up:

1. From your DocuSign Rooms account, select 'My Docs' on the top menu
2. Select 'Form Templates'
3. Create Form Template
4. Select Form from either the DocuSign Form Library or DocuSign Form Group, from the drop down menus
5. Pre-fill any data that you will typically add to the form (Note: Add information that would be used for a typical transaction, and the info is able to be changed for specific transactions, once it is brought into your DocuSign Room.)
6. Rename the template, by clicking the pencil icon on the top left > Click the checkmark to save title
7. Click 'Save and Close' on the top right to Save the Template

Apply Templates Made from DocuSign Forms

To apply the template to a new transaction:

1. Open your DocuSign Room
2. In the Documents tab of your Room, select 'Add'
3. Click the checkboxes to select the form to add
4. Once the form is selected, you will see a drop down menu appear
5. Click the drop down menu to select the template to apply (this will only appear for forms you have a template created for)
6. Add Selected

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To apply the template to an existing form in your DocuSign Room:

1. Open your DocuSign Room
2. Select the Documents tab of your Room
3. If the form has already been added to your Room, right click on the form to select 'Apply Form Template'
4. Select the template to add > Apply

Click here for a video tutorial on creating and using templates created from your interactive board forms and/or PDFs, respectively.

Cheat Sheets By Topic

myKW Cheat Sheet	Referrals Cheat Sheet
KW Connect Cheat Sheet	Opportunities Cheat Sheet
Consumer App Cheat Sheet	DocuSign Cheat Sheet
Command App Cheat Sheet	Campaigns Cheat Sheet
Command Settings Cheat Sheet	Reports Cheat Sheet
Contacts Cheat Sheet	Designs Cheat Sheet
Tasks Cheat Sheet	Listings Cheat Sheet
SmartPlans Cheat Sheet	Consumer Cheat Sheet

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