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KW Command & DocuSign Compliance Process

Command

STEP 1: Create the Buyer/Seller Contact(s) in Command

COMMAND ▸ CONTACTS

Click the **+ Add Contact** button to create a contact for the buyer(s)/seller(s) of the home. The only required info is a **First & Last Name**. Then click **Create**. You can create a contact for a spouse or other party to the transaction, and add them as a Co-Buyer or Co-Seller.

STEP 2: Create the Opportunity

COMMAND ▸ OPPORTUNITIES

Click the **Create Opportunity** button, assign it a **Listing** or **Buyer** type, then type to search the **Client** field for the contact you just created to attach to the Opportunity. You can use the **Co-Buyer** or **Co-Seller** field to attached a related contact. Fill in any additional Opportunity details (including its **Phase** and **Stage**, estimated closing date, price, and commission rate).

STEP 3: Start the Transaction

COMMAND ▸ OPPORTUNITIES ▸ DOCUMENTS

Click the **Start a Transaction** button to automatically create a Room in DocuSign that is linked to this Opportunity.

REMEMBER: Always start the DocuSign Room using the **Start a Transaction** button! This button links the Command Opportunity to documents in the DocuSign Room it creates.

Once you've successfully started the transaction, the button will change to say **Go to Transaction**. Clicking it will take you directly to its connected DocuSign Room. Try it!

DocuSign

STEP 4: Add Transaction Details in DocuSign

DOCUSIGN ▸ ROOM ▸ DETAILS

Click the **Edit** button to add details/info to your transaction. The transaction details you add here (such as price, buyer name/seller name, etc.) will automatically populate their respective fields in the DocuSign documents that you add to the Room.

STEP 5: Add Documents & People to the DocuSign Room

DOCUSIGN ▸ ROOM ▸ DOCUMENTS/PEOPLE

Click the **Add + ▸ DocuSign Forms** button, then **Skip** the **Enter NRDS Information** screen. Select **DocuSign Forms Group** from the first dropdown, then from the **Select Group** dropdown, select **Buyer** or **Listing** to add that template of documents to your Room.

Next, from the **People** tab, click the **+ Invite** button. Enter details for all signers required to sign the documents including their **Transaction Side** and **Role**.

DocuSign

STEP 6: Send an Envelope of Documents for Signing

DOCUSIGN ▸ ROOM ▸ ENVELOPES

Click the **+ New** button to start a new Envelope to send. Click the **Room Docs** button to select from documents you added in the previous step to add to the Envelope for signing.

Next, click the **Add Recipient** button, then **Pre-Tagged Roles**. This will automatically add Recipients based on their Role's signature requirements in the documents you've added to the Envelope.

Finally, click the yellow **Next** button at the top to assign any additional signature fields in the document(s), then click the yellow **Send** button. When you're notified that all of your documents have been signed, and you're ready for compliance review, proceed to **Step 7**.

Command

STEP 7: Build Your "Broker Folder" in Command

COMMAND ▸ OPPORTUNITIES ▸ DOCUMENTS

Under the Command **Documents** tab, there are three "compliance events" on the left side of this page: **Listed** or **Consultation**, **Under Contract**, and **Closed**. You will insert your final, signed DocuSign files into each of the document placeholders in each "compliance event" as it happens, thus creating a "broker folder" of *only* the final, signed documents for review.

Click the **+ Add a File** button next to each document placeholder, select **Source of Documents: DocuSign** to view the documents in the DocuSign Room connected to this Opportunity, select the final, signed document you want to insert into the placeholder, then click **Assign**. The file will be copied directly from DocuSign into the Command placeholder.

STEP 8: Submit Your "Broker Folder" for Compliance Review

COMMAND ▸ OPPORTUNITIES ▸ DOCUMENTS

For each of the three "compliance events" in Command that you complete by filling their document placeholders, you'll click the **Submit to MC** (Market Center) button. The **Submit to MC** button notifies the broker that the documents you inserted from DocuSign are ready for compliance review.

You'll see colored tags next to documents such as Uploaded, Returned, and Approved that let you know the status of your documents during their compliance review phase. You'll also see any explanatory comments from the broker for each document.

STEP 9: Accept an Offer

COMMAND ▸ OPPORTUNITIES ▸ OFFERS

In order to get paid, you first must accept an Offer on the Opportunity. Under the **Offers** tab, click **+ Add New Offer**, enter the **Offer Details**, **Parties**, and **Terms**. Once you've entered the offer you're going to accept, click the **Accept** button. This will activate the Commissions tab.

STEP 10: Submit Commission Details

COMMAND ▸ OPPORTUNITIES ▸ COMMISSIONS

The **Commissions** tab replaces Greensheets! You'll enter the commission breakdown details here, then click the **Submit** button. This will notify the staff to create a DA for you!

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Create Your DocuSign Account & Connect It to Command

STEP 1: Navigate to Your Command Settings

COMMAND ▸ SETTINGS ▸ APPLICATIONS

In the top-right of any Command page, click **[Your Name]** then **Settings**. If the DocuSign section of this page says **Current Status: Connected** with a **Disconnect Account** button, then **STOP**, your DocuSign account is already connected!

NOTE: If you already have a DocuSign account connected, you can click the **Manage** button to see the email address of the DocuSign account you have connected to DocuSign. If you wish to change your DocuSign email address, **DO NOT** create a new DocuSign account. See Wes for help on changing your email address, first.

STEP 2: Connect/Create Your DocuSign Account

COMMAND ▸ SETTINGS ▸ APPLICATIONS

Click the aqua **Connect Account** button next to DocuSign. Review your **Preferred First & Last Name** and **Preferred Email**.

NOTE: Your **Preferred Email** should be the email address you do business with. For most agents, this will be your KW email address or perhaps a branded email address (such as one you pay for with Google GSuite). You shouldn't use a personal email address for this account.

Click **Send Registration Email**.

STEP 3: Accept the KW DocuSign Invite

YOUR EMAIL ACCOUNT

Check the email address you just used as your **Preferred Email**. You should have an email with the subject **You've Been Invited to Join DocuSign Rooms**.

Click the **Accept Invite** button in the email.

STEP 3: Activate Your DocuSign Account

DOCUSIGN.COM

Enter a secure password (at least 8 characters (more is better) with at least one of each: lowercase, uppercase, number, and symbol).

Enter a **Password Question**. You must answer this question correctly if you ever forget your password, so remember it! If you set up your account in a previous class, we may have used **Who was your first boss?** with **Jennifer Arsenault** as the answer. You should change this if you already have an account.

TECH TIP: Instead of answering the question with a correct answer, use another password as your answer! That way, if someone knows the answer (e.g., your mother's maiden name), they won't know that you actually answered with a password instead! Make sure that you remember you answered with another password! You can keep this information store in a password vault app such as 1Password.

Click the **Activate** button, then on the following page, click the **Accept Agreement** button.

STEP 4: Authorize the Command & DocuSign Connection

COMMAND ▸ SETTINGS ▸ APPLICATIONS

Return to your Command **Settings** page, and click the **Authorize** button in the DocuSign area. If the button still says **Connect Account**, then refresh this page.

Enter your **DocuSign password** on the following page.

A pop-up window will appear requesting DocuSign–KW permissions. Click the **Accept** button.

If the permission window doesn't pop-up for you, you may need to look for an **Allow pop-ups from…** warning in your browser. In Firefox, this appears as a **yellow bar** at the top of the page. In Google Chrome, you will see a **small icon** in the right side of your address bar.

Congrats! Your DocuSign account has been created & connected to Command!