Take Command

DocuSign Training Guide

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Need DocuSign Support? Call 1-800-379-9973

STEP ONE: Log in to Command

www.agent.kw.com

Username and Password will be the same as your mykw.kw.com account

This product is in Labs

BS

Click to learn more

kw

Welcome to Keller Cloud!

Sign in with your MyKW account to access Keller Cloud

cmcquistion

Sign In

Forgot Password

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Charity McQuistion



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	Contacts		STEP 3: Add your customer as a	Import Add	Contact
පුය	Q Search 💌 🐲 Fi	ilters SmartView: All Conto	contact. (If your client is		
			already in your contacts list		
	Selected: 0		you can skip this step and	Show 1-10 of 58	• >
0		AST VISITED LAS	Opportunities)	E PRIMARY PHONE	
(fi) +	Aaron Dake			+1 734-284-5400	
14	ABBY MUCCI		Click Add Contact	+1 734-363-9185	
o00	Abe Beydoun		KW LEGACT AGENT	+1 313-930-2444	•••
Ľ	Adam Blake			+1 586-610-0337	
百	Adam Graham			+1 734-634-3640	•••
\bigcirc	Adam Hage			+1 313-598-2566	
Ē ★N	OTE* You are able to add			+1 248-644-3500	•••
	ntacts individually or in			+1 947-252-6529	
bulk using a CSV file. In this		May (8 mc	21, 2019 Inths ago) KW LEGACY AGENTS	+1 313-932-4111	••••
fo	uning we are only going to cus on adding individually	. (8 mo	21, 2019 withs ago) KW LEGACY AGENTS	+1 313-701-9114	









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Sales Piț 12 Q	Market Center Premier	Opportunity Name*		Team	STEP 5: Update the Details tab of the Opportunity.
	Custom tags				Fill in information.
	Select	Ψ			Click Save.
Opp Ger	Deal Owner Charity McQuistion				* TIP *The more you fill in here the more information
-	Contact Name*	Co-Buyer			will be autofilled in later
	Sally Seller 💌	Select			steps. Fill information
	Opportunity Phase*	Stage*			as you get it.
	Active	Negotiations			
	Time Frame Months Estimated	Closed Date	Appointment Scheduled	A E	ppointment Date
	Agreement Won	Contract Date		Closed Date	•
	Cancel				Preview

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2 23	Details	Documents	Offers 0	Commissions 🚯	Notes 0	Timeline
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	General Information	STEP 6: A	dd Documents		Ø.	
(A) (C)	Market Center Opportunity Name	Premier 1234 Main St	iments	US 123 South Main Street		
	Team		City	Royal Oak		
dı Ci	Custom Tags Owner	Charity McQuistion	State/Province Zip/Postal Code County	MI 48067 Oakland County		
	Phase Stage Contact Name	Active Negotiations Sally Seller	Description		l d	
	Co-Buyer		Mortgage: ABC Lender	Title: DEF Title Co		
	Timeframe	0				
	Estimated Closed Date					
	Appointment Scheduled					
	Agreement Won					
	Contract Date	01/08/20				

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	Add new Custom Folder			Required						

DocuSign [®] Rooms	STEP 6: Add
Email Address	Log in to Doc
CONTINUE	username an created in Ste

d Documents

cuSign using the nd password you tep 2.



Learn more about DocuSign for **Real Estate**



View DocuSign for Real Estate plans and pricing



Get support for DocuSign Rooms





KELLERWILLIA	MS. Rooms	DASHBOARD	ROOMS	INBOX	MY DOCS	Q (?)
	1234 Main St Example ID: #2987562 Created: 1/12/2020					
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Name * 1234 Ma Created	in St Example	Side * Buy Side				Status Active
KW Pren	nier DocuSign Account on 01/12/2020 at 11:07 AM		STEP 6: A	Add Doc	uments	
V ROOM INF	ORMATION 2		Click Edit.			
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County		Country * United States				State/region/province

1234 Main St Example ID: #2987562 Created: 1/12/2020 DETAILS DOCUMENTS PEOPLE ENVELOPES MESSAGES HISTORY NEW TOPIC Image: Created: C	
DETAILS DOCUMENTS PEOPLE ENVELOPES MESSAGES HISTORY	
	4
ROOM INFORMATION 1 Required to Close * SELLER 1	
Name * Side * Status Name	
1234 Main St Example Buy Side Active Seller Test One	
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KW Premier DocuSign Account on 01/12/2020 at 11:0 STEP 6: Add Documents	
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Select local currency vour documents later.	
Email	
TIP At minimum fill in the	
Select origin of lead	
will ensure you do not have	
LOCATION Required to Close*	— /
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Address 1 Address 2 DUXCS IGICI.	
Address 2	
County Country State/region/province	
EDITING ROOM DETAILS	SAVE

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DETAILS	Fill in the document. Click Save & Close.	r changes SAVE & CLOSE THER ACTIONS -	
Docanio	* NOTE * You will not see signature boxes in this stage. Signatures and initials will come in the next stage of editing.	€ Q EXCLUSIVE BUYER AGENCY CONTRACT	
	Client(s): Client(s) Address Client(s) Address Client(s) Address Properties and understand the accountants, ta appraiser, envin parties underst 2. PROPERTY: Clien 3. EXCLUSIVE AGE Broker is Chery term of this Ag property shall including, but r contact agent to 4. TERM/CANCELL	In thas employed the services of Broker to assist Client in purchasing real estate, as more particularly described in Broker's services shall include, but not limited to, consulting with Client regarding the desirability of particular d the availability of inarcing; formulating acquisition strategies; and negotiating purchase agreements. The parties hat the brokers and agents representing the parties are not acting or advising the parties as their lawyers, tax advisors, mortgage counselor, engineers, surveyors, title examiner, home inspector, builder or developer, vironmental expert, or with regard to any matter outside their expertise as real estate brokers and agents. The stand that, if they need advice on such matters, they need to consult with experts on these issues.	

























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23	Destination	Click Assign.	
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0	Under Contract • Submitte	d Select the document for Exclusive Buyer's Agency Contract or upload a new document.	FILE 🔻
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百	Fax			Ē	Associate's Name*		Associate's Name*						
r©1				\bigcirc	Charity McQuistion		Listing Agent 1						
	Address				cmcquistion@kw.com	1							
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	Pre-App	proved Pre-Qualified		ſ	Back			(Terms >				
	Represen	tation	L	Represe	ntation							_	

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STEP 11: Creating Offers

Fill in Information.

Click Agent Analysis

	Terms
23	Cash Finance Amount Sales Price
図= □=	\$5,000.00 + \$150,000.00 = \$155,000.00
	Earnest Amount
8	Percentage Earnest Amount
6 3	2 % \$3,100.00
	Option Fee
000	Option Fee
Ľ	\$0.00
ē	Termination Option
\bigcirc	Buyer will give notice of termination within 30 days after contract.
	Seller Costs
	Seller will contribute \$0.00 to a residential service contract.
	Seller will contribute \$0.00 to settlement costs.
	Back







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Details	Documents	Offers 1	Com	missions	Notes 0	Timeline
iales Price	Commission		Units		Summary	• Ope
\$155,000.00	3 %	4,650.00	1		TOTAL COMMISSION	\$4,650.0
					ROYALTY	\$279.0
Lontract Date*	Closed Date*				COMPANY CURRENCY	\$1,395.0
1/8/2020	1/31/2020	Ë			PAY TO AGENTS	\$2,976.0
					Charity McQuistion	\$2,976.0
			Г			\$1,674.0
Agent Breakdown Agent Charity McQuistion	Unit	Total Commission		Sheet Begin fillir	o in information	
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GROSS COMMISSION	\$4,650.	00		If details v stages mo generated	vere filled in on prev ost info should be a l here.	vious uto
ROYALTY	-\$279.	00		-		
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	Sales Price	Commission	Units	Sheet	
<u>A</u> 2	\$155,000.00	3 % \$4,650.00	1	If there is more than 1	agent from
図= □	Contract Date*	Closed Date*		the same office on the	e transaction
	1/8/2020	1/31/2020		commission for the fir	st agent
0	Add Co-Broker Payment			here.	
5	Agent Breakdown			Charity McQuistion PAY TO OFFICE	\$3,164.80
	Agent	Unit Total Commi	nission		
000	Charity McQuistion	_ 1 + \$4,650.0	00	Add Note	
Ľ	▼ PAYMENT BREAKDOWN 01/15/20	3 \$4,650.00			
Ē	GROSS COMMISSION	\$4,650.00		Submit	
\bigcirc	BONUS	+\$295.00			
		\$295.00			
	ROYALTY	-\$296.70			

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kw	command connect command ^{™C}		🛱 🔱 🥡 Charity McQuistion 👻 ⑦	1
		Unable to submit: - no agents or not all money paid to agents		
<u>8</u> 2	Sales Price Commission	Units	Summary • Open	
	\$155,000.00	STEP 12: Submit Commissions	TOTAL COMMISSION \$4,650.00	
C.	Contract Date* Closed Date*	Sheet	BONUS \$295.00 ROYALTY \$176.70	
~ \$\$	1/8/2020	A red bar will appear across the	COMPANY CURRENCY \$883.50	
₩ 1	Add Co-Broker Payment	that all of the commission has not	PAY TO AGENTS \$1,884.80	
000	Agent Breakdown	been allocated.	PAY TO OFFICE \$1,060.20	
ГÚ	Agent	Unit Total Commission		
	Charity McQuistion	- 1 + \$2,650.00	Add Note	ľ
	▼ PAYMENT BREAKDOWN 01/15/20	\$2,650.00	Submit	
	GROSS COMMISSION	\$2,650.00		
	BONUS	+\$295.00		
		\$295.00		



STEP 12: Submit Commissions Sheet

Start typing agent's name. If they are an agent in your office their name will generate.

× | + Command | Documents mission?contactId=56850573&id=848077&teamId= 🚾 mykw - Home 🛛 🚾 Command | Dashbo... 🚱 Launch Your MCA C... 🍞 Capital One | Accou... 📙 Clarkston KW Charity McQuistion 🔻 Unable to submit: - no agents or not all money paid to agents 100 % Summary o Open Click their name. TOTAL COMMISSION \$4,650.00 X d Agent BONUS \$295.00 ROYALTY \$176.70 gent* \$883.50 Lisa . PAY TO AGENTS \$1.884.80 Lisa Sutter \$1,884.80 \$1,060.20 PAY TO OFFICE **KW Cares** KW Kids Can Cancel Add CHECK AMOUNT \$1,884.80

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5	ROYALTY	-\$120.00	title company/attoney office so the DA can be sent.	arity McQuistion	\$1,884.80	
	Associate Royalty	\$120.00	Once all information is completed	a Sutter	\$1,280.00	
nIn	Rate	6 %	Bulance: \$5,000.00		\$1,780.20	
r d	Split	100 %		⊕ Add Note		
	COMPANY COMMISSION	-\$600.00		Submit		
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	Sheet					€ 0/0
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	under review by your MCA.		Offers 1	Commissions	Notes 0	Timeline
0				-	_	
6 3			Your commission is und	der review by your MCA		
	Sales Price Commission			Units	Summary	Submitted
000	\$155,000.00 3 %	\$4,650.00		1	TOTAL COMMISSION	\$4,650.00
Ľ					BONUS	\$295.00
B	Contract Date* Closed Date*				ROYALTY	\$296.70
	1/8/2020	Ë			COMPANY CURRENCY	\$1,483.50
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	Agent	Unit	Total Commission		PAY TO OFFICE	\$1,780.20
	Charity McQuistion	- 1 +	\$4,650.00		I	
	▼ PAYMENT BREAKDOWN 01/15/20	\$4,650.00				

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kw	STEP 12: Submit Commissio	ns		雷 🔱 👰 ci	narity McQuistion 🔻 🥐
	Sheet				0/0
23	Once your commission is				
図= □=	accepted your message will				
	change.	Offers 1	Commissions	Notes 0	Timeline
0	Your commission will then be		-		
5	processed based on your Mark	et Your co	ommission was accepted		
	Center standards.		Units	Summary	Accepted
o80	You will now want to move the	50.00	1	TOTAL COMMISSION	\$4,650.00
Ľ	Opportunity Card to the Closed			BONUS	\$295.00
be	portion of your Sales Pipeline.			ROYALTY	\$296.70
		——————————————————————————————————————		COMPANY CURRENCY	\$1,483.50
\mathfrak{O}				PAY TO AGENTS	\$3,164.80
	Agent Breakdown			Charity McQuistion	\$3,164.80
	Agent	Unit Total Commiss	sion	PAY TO OFFICE	\$1,780.20
	Charity McQuistion	_ 1 + \$4,650.00			
	▼ PAYMENT BREAKDOWN 01/15/20	\$4,650.00			