

KW Command & DocuSign Compliance Process

KW Command

OPPORTUNITY SETUP

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

If your buyer(s) or seller(s) don't already exist in your Command Contacts, then click the **+ Add Contact** button to create a contact for your buyer(s) or seller(s). The only required info is a **First & Last Name**. Then click **Create**. You should also 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 > CONTACTS > CONTACT DETAILS > OPPORTUNITIES TAB
From the **Opportunities** tab inside the contact's details, click the **+ Create Opportunity** button, and assign it a **Listing** or **Buyer** type. You can use the **Co-Buyer** or **Co-Seller** field to attach a related contact. Fill in any additional opportunity details (including its **Phase** and **Stage**, estimated closing date, price, and commission rate).

BONUS TIP: Finding Your Opportunities

COMMAND > OPPORTUNITIES > ALL OPPORTUNITIES

You can find your opportunities 3 ways:

1. Inside the **Contact Details > Opportunities** tab of your contacts.
2. In the **Opportunities** tool > **Sales Pipeline** (Buyer or Listings), then in the **Phase & Stage** you moved the opportunity into.
3. If you have a lot of opportunities, and don't know where they are in your Sales Pipeline, go to **Opportunities > All Opportunities** to see them all listed. You can scroll to find it, or use the search field to search by address, contact name, or opportunity name.

STEP 3: Start the Transaction & Create DocuSign Room

COMMAND > OPPORTUNITY > DOCUMENTS TAB

Inside the opportunity you created, click the **Documents** tab. Click the **Start a Transaction** button to automatically create a room in DocuSign (or a loop in DotLoop) that is linked to this opportunity.

REMEMBER: Always start the DocuSign room (or DotLoop loop) using the **Start a Transaction** button from inside your Command opportunity! This button links the Command opportunity to the documents in the DocuSign room that it creates. You cannot "re-link" an existing room or loop to a Command opportunity if you created the room/loop outside of Command.

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 (or DotLoop loop). Try it!

DocuSign Rooms

DOCUMENT SIGNING

STEP 4: Edit Transaction Details in the DocuSign Room

DOCUSIGN > ROOM > DETAILS TAB

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 to the DocuSign Room

DOCUSIGN > ROOM > DOCUMENTS TAB

Click **+ Add > DocuSign Forms** (you can skip any NRDS information or MLS association questions). Select the **Buyer** or **Listing** folder under **Groups**, click the checkboxes next to the documents you want to add to the room, then click **Add Selected**.

STEP 7: Send an Envelope of Documents for Signing

DOCUSIGN > ROOM > ENVELOPES TAB

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 the signatures required 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**.

BONUS TIP: Automated Envelope Sending

DOCUSIGN > ROOM > ENVELOPES TAB

You can use the numbers next to a recipient (1, 2, 3, etc.) or **drag** them in the order you want so that DocuSign will automatically email your envelope to the next person in the order you set when the previous person finishes their signing.

If two or more recipients share the same order number, they will both be emailed the envelope at the same time (great for spouses!).

KW Command

COMPLIANCE REVIEW

STEP 7: Build Your "Broker Folder" in Command

COMMAND > OPPORTUNITIES > DOCUMENTS TAB

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'll insert your final, signed DocuSign files into each of the document placeholders in each "compliance event", 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 "Broker Folder" for Compliance Review

COMMAND > OPPORTUNITIES > DOCUMENTS TAB

Once you've filled in the required document placeholders for a "compliance event", you'll click the **Submit to MC** (Market Center) button. The **Submit to MC** button notifies the broker that the documents you uploaded 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: Create & Accept an Offer

COMMAND > OPPORTUNITIES > OFFERS & COMMISSIONS

In order to get paid, you first must accept an offer on the opportunity. Under the **Offers & Commissions** 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 allow you to enter your commission details.

STEP 10: Submit Commission Details

COMMAND > OPPORTUNITIES > OFFERS & COMMISSIONS

Commissions 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!

BONUS TIP: Inside vs. Outside Referral Commissions

COMMAND > OPPORTUNITIES > OFFERS & COMMISSIONS

Never use the *Inside Referral* option! Instead, if you're referring business to another *KW Elite* agent, click **Add Agent**, then assign them the percentage of the unit & commission. For any referrals to agents in *another KW office* or *non-KW* brokerage, use the **Outside Referral** option.

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.

STOP!

Please see [Wes](#) before continuing with **ANY** of the steps below!

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.

Connect Command to DocuSign (and DotLoop)

STEP 4: 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!

TECH TIP: More Secure Security Questions

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 stored in a password vault app such as **1Password**.

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

STEP 5: 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!

TECH TIP: Connecting DotLoop to KW Command

Click the **Marketplace** icon at the top of Command, then use the **Search Marketplace** field to search for **dotloop**. Click the **Activate** button inside the DotLoop product, then click through all of the order screens (there is no cost for the DotLoop connection).

Navigate back to **Command ▶ Settings ▶ Applications**, then click **Connect Account** next to the **DotLoop** application. Enter your DotLoop username & password, then click **Connect!**