Docusign FAQ

Why is the template not populating information correctly from the details section?

We have seen that some of the NEFAR or KW templates populate incorrectly from the Details section. For now you will have to manually change this information, but email jennmurray@kw.com a screen shot of the template that is not populating correctly and we will fix it as soon as possible!

When I'm filling out the contract, it does not allow me to assign signatures. How do I assign signatures?

Docusign uses the "Envelope" section to assign signatures. Once you have your documents filled out, simply click on Envelopes and send for signatures. Make sure that you use "Pretagged Roles" when adding a recipient. This will make assigning signatures and fields a breeze!

I have all of my contracts signed and executed but they have not appeared in my Opportunity. Why?

Once you have signed and executed contracts you then go to your Opportunity and choose your checklist type. Once you do this, you can add multiple files at once (they do not populate automatically from Docusign into the checklist rows) by clicking on attach multiple files. Once you do this, select the Docusign option and each drop down on the checklist will allow you to pick the completed Documents from your Docusign Room. Place them line by line on the corresponding checklist item. Once you complete, save and click on Submit to MC.

I completed a PASA but the contract got rejected and now I can't add another one to the Room. How do I write a new PASA without starting a new room?

When you edit a Docusign form it actually creates a copy of the original. You should see two in your room- the one that has been signed and the original blank PASA. You can edit the blank one for your new contract and delete the rejected one.

Can you add a Transaction Coordinator to your Docusign Room?

At this time your Transaction Coordinator will need to use your login to have access to your account.

How do I create my own custom Templates in Docusign?

How to upload a Document/PDF and assign signatures: https://youtu.be/pgDk-yAGPSA
How to create custom templates: https://youtu.be/9XIofFV-4jQ
How to create a folder of documents for future use:
https://support.docusign.com/en/guides/ndse-user-guide-template-folders

How do I start a room in Docusign and make sure that it is linked to my Opportunity in Command?

In order for your Docusign room to link to your Opportunity, you must first create the Opportunity, open it, go to Documents section, then click on Start a Transaction.

Where do I correct the buyer/seller information?

Details section of the Docusign Room. Also, double check to make sure the contact in Command has the correct contact information.

Can two people have the same email address?

Yes.

Where do I find my Docusign account number?

Once logged in to Docusign, click on your initials in the top right and a drop down will appear. Under your name and email you will find your account number.

Can I delete a Room?

You cannot delete a room. Your MCA will close the room at the end of the transaction.

Link to Docusign specific videos to help complete tasks in Docusign:
https://www.youtube.com/playlist?list=PLWEqQfNcKGL6EMGnO3OhC83FB5KpFVhHm