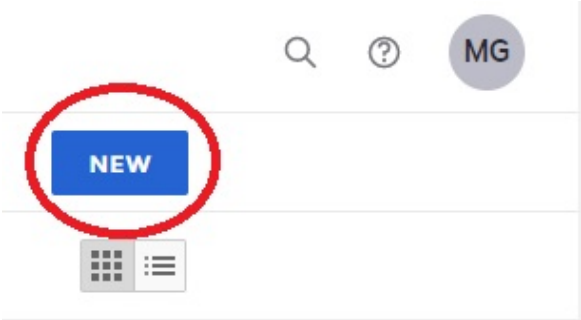
DocuSign Transaction Rooms (DTR) Walkthrough Guide

Login to your DocuSign Transaction Rooms (DTR) account by going to realestate.docusign.com. Your 'room' is where all of your documentation is stored for the transaction. The task list is where in the room the documents individually are filed. Within the task list there are tiles which are the named rectangles. Some tiles are red, meaning they are required to be filled, and some tiles are gray, meaning they're optional. Some gray tiles can end up being required if they're applicable to your file (ex. Lead Paint, Earthquake, or something similar). Anything you DELETE out of the room is deleted permanently out of the system, if done by mistake you will have to add it back in. When you send your documents into the room, they show up at the bottom of the room under the folder name "Room Docs". After you split documents, the original and all of the splits you made will also be under Room Docs. The same if you combine documents. Please DO NOT add documents to the task list that are incomplete (i.e. missing signatures, dates, checked boxes, etc.). Keep at the bottom of the room and leave the tiles open until they're 100%.

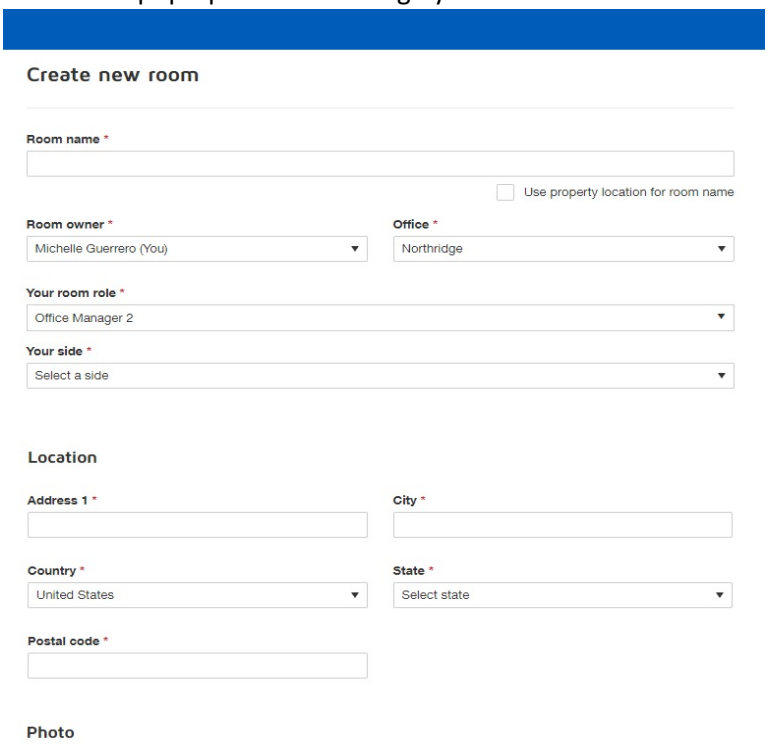
<u>Create a New Transaction (Adding a New Room):</u>

1. Click the "Rooms" tab at the top

2. Click "New" at the top right



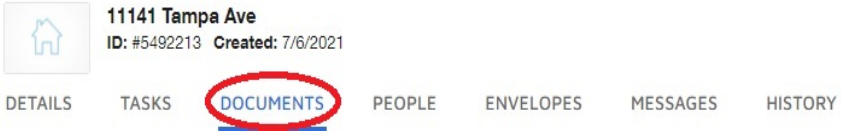
3. Fill out the pop-up screen thoroughly



   a. Name (use property address)
   b. Fill out the address portion thoroughly (Address, city, state, zip code)
   c. Select your role (Real Estate Agent, Administrator, etc.)
   d. Transaction Side (List Side, Buy Side or both)
4. Click "Save"

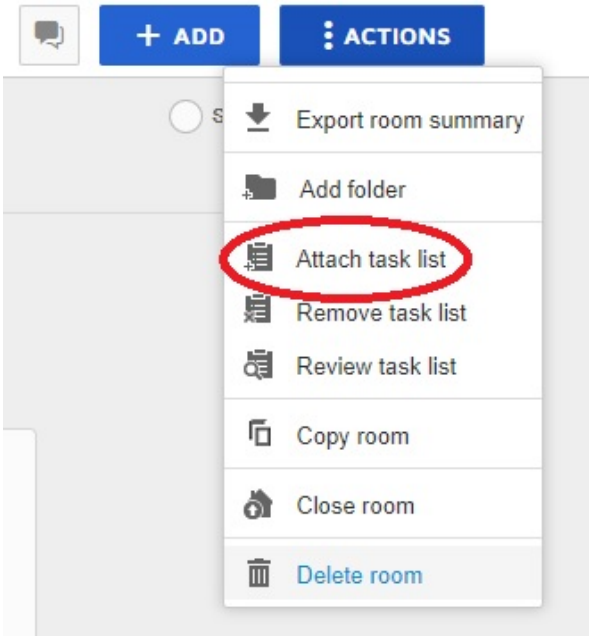
<u>Adding a Task List:</u>

1. Click the "Documents" tab



2. Click the "Actions" button on the top right

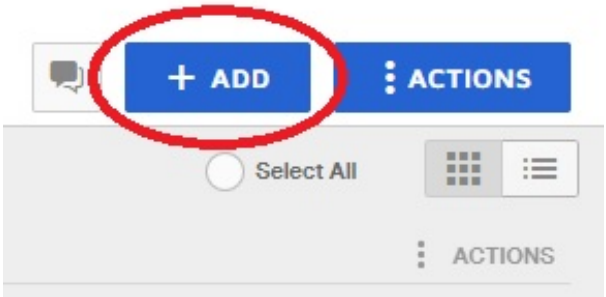
3. Click “Attach Task List” on the drop-down menu



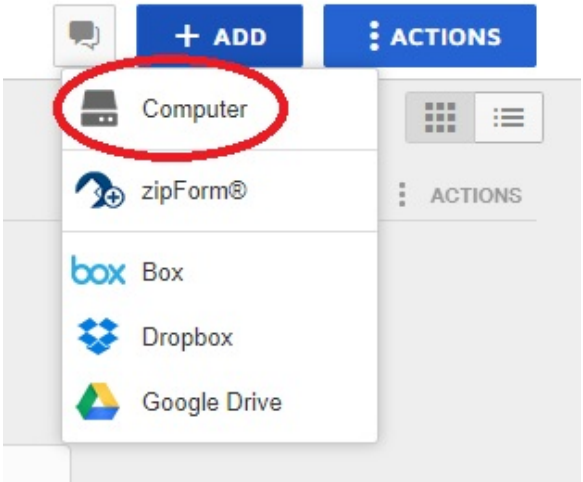
4. Add the task list that correlates to your transaction (ex. Remax One Sale, Remax One Listing, Remax One Lease Listing, etc.)

<u>Adding Documents into the Room:</u>

1. <u>Adding from the Desktop:</u>
   a. Under the “Documents” tab click on “Add” at the top right

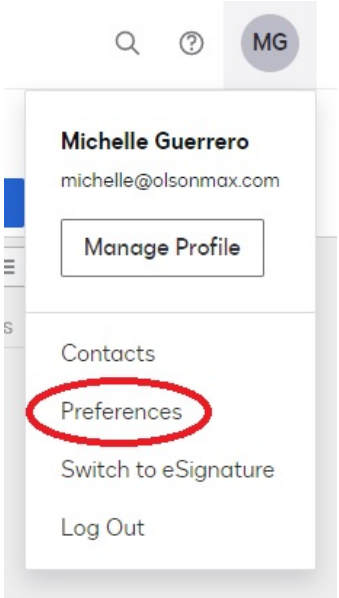


b. Click “Computer”

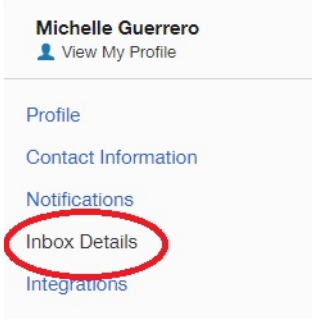


c. Browse your computer and add all documents needed

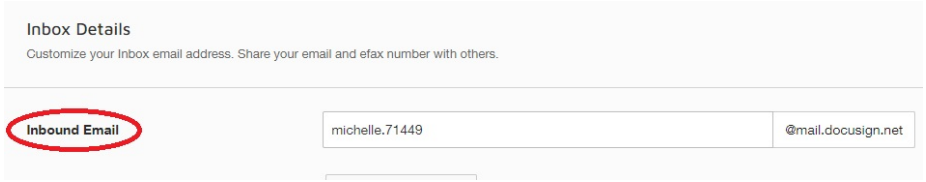
2. <u>Forwarding from Email:</u>
   a. Locating Your DTR Email
      i) Each user is assigned a DTR email address, you can find that by clicking on the “Preferences” tab on the top right under your profile



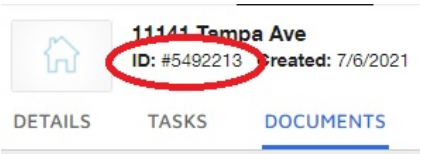
ii) Click on “Inbox Details” on the left



iii) Your “Inbound Email” is your DocuSign transaction room email address



b. Use the “Room ID” including the pound sign/hashtag as your subject line

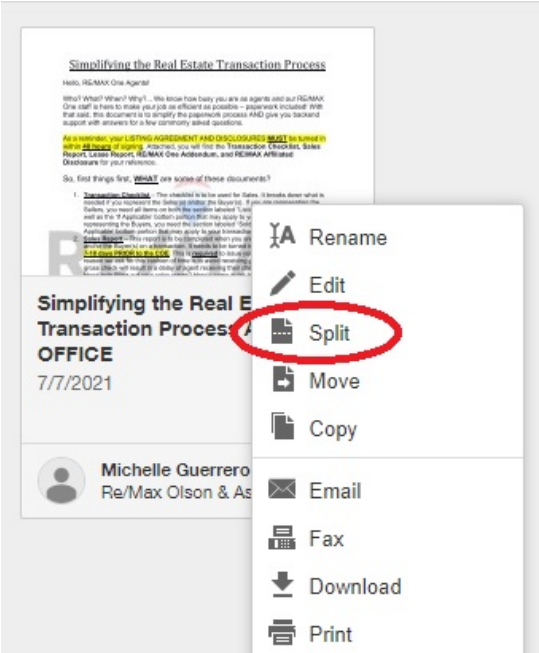


c. Send the email directly to your DTR email address (example: user12345@mail.docusign.net)

i) You do not need to have anything in the body of the email

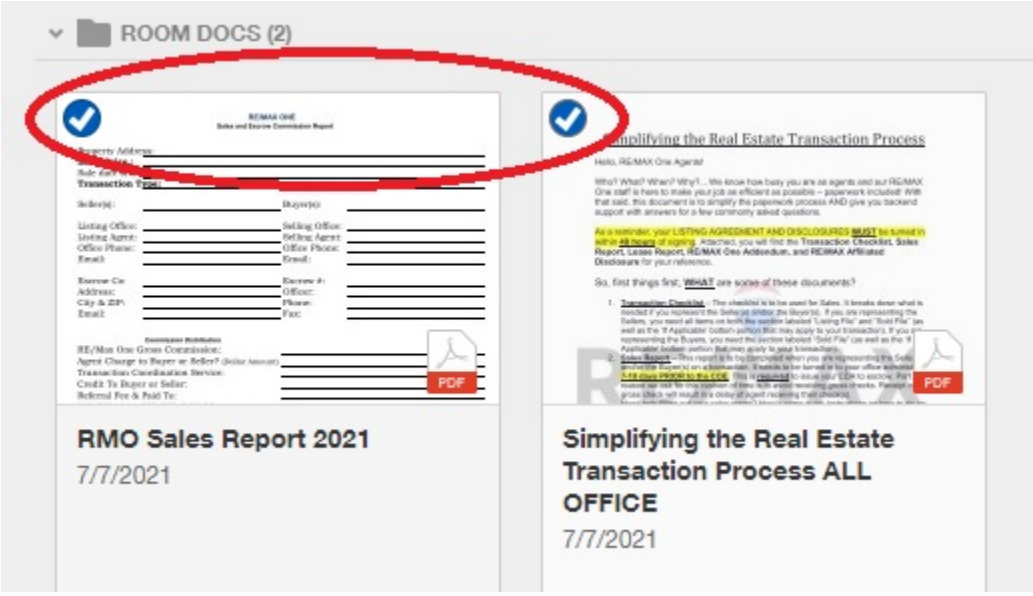
Splitting a Document:

1. Hover over the document you want to split
2. Right click and select “Split”

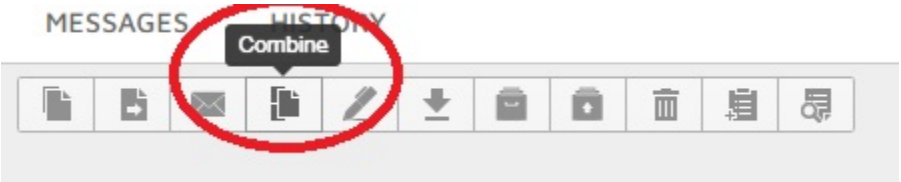


Combining Documents:

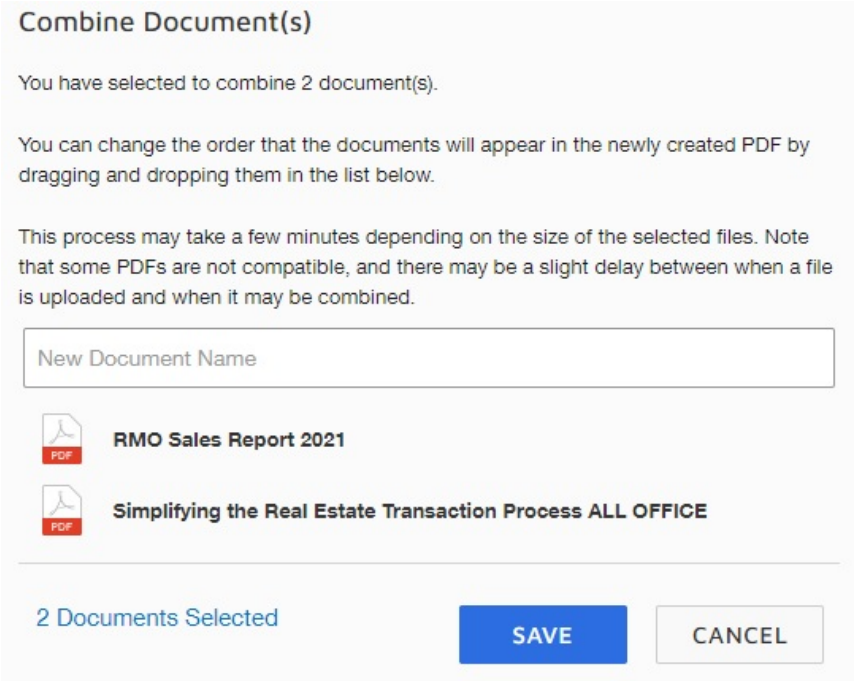
1. Select the documents you want to combine



2. Select "Combine"



3. Rename your new document



4. Save your new document

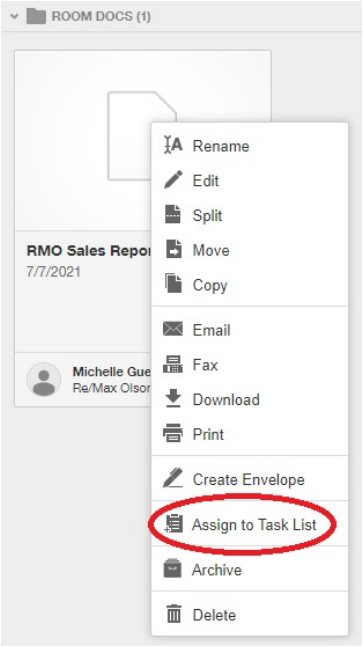
Adding Documents to the Task List:

1. Hover over the tile in question
2. Right click the tile

3. Attach document to tile

OR

4. Hover over the document in questions
5. Right click the document
6. Select "Assign to Task List"



Once the file is complete, send to Administrator for Approval:

1. Select "Actions"
2. Select "Submit Task List"
3. Select "Submit"