DocuSign Integration

We have great news! MoxiWorks is integrated with DocuSign! Here you can manage your DocuSign Transaction Rooms and your E-signature accounts!

Using DocuSign in Engage

In your Engage account you can create a DocuSign Transaction Room!

1. When you have a transaction in Engage select the **Details** tab.

AM		marketing	prospects	actives	pending
			Ahmed Meyers -	- seller	
AHMED MEYERS Seller			MOVE TO PENDING ZONE	E 🗸	
add transaction	TAS	KS DETAILS			
PROFILE	33 tas	ks remaining			add task
Ø NOTES			this week		DUE
ACTIVITY	\bigcirc	Mail Gift			<u>₹</u> 3/5/18 ∨
Ahmed Meyers - seller	\bigcirc	Schedule Appointmer	t		<u>₹</u> 3/5/18 ∨
seller	\bigcirc	Submit Paperwork			<u>₹</u> 3/5/18 ∨
SUBSCRIPTIONS add	\bigcirc	Create Property Prep-	List		₫ 3/7/18 ∨
Listing Announcements (1)		Assign Listing Number	r		₹ 3/8/18 ∨

2. Scroll to the bottom of the details page and you will see the DocuSign integrations! Select Create Room.

TASKS DETAILS	
Property Details	delete or deactivate edit
MLS Yes	Category seller
Start Date February 28, 2018	Address Ap #235-2504 Orci. St. Issaquah, WA 98227
MLS # N/A	Target Price \$565,000
Bedrooms 3	Bathrooms 5
Square Feet N/A	
Agent Details	
Commission %	
For Real Estate Create a Transaction Room named Ahmed Mey Save time by sending property, transaction, and of Additional Details	create room

3. This will create your DocuSign transaction room! You will see your details page which will bring over any information in Engage to the DTR.

ocu Signe.		O DASHBOARD	TRANSACTIONS	LINBOX	MY DOCS			
Torrey Pines Circle 14390 Torrey Pines Cr., Draper, UT 8- ID: #1767036 Created: 7/12/2018 TAILS TASKS DOCUMENTS	4020 PEOPLE ENVELOPES ACTIVITY						1	ACT
TRANSACTION INFORMATION Required to Close *					v SELLER 1			
Name *	Status	Company Room S	tatus		Name			
Torrey Pines Circle	Active	Select Company		~				
Under Contract	Side *	MLS ID			Home Phone			
	List Side 🗸							
Origin of Lead	Washington State Currency				Cell Phone			
Select Origin of Lead	Select Currency 🗸							
					Business Phone			
OCATION Required to Close *								
Address 1 *	Address 2	City *			Email			
14390 Torrey Pines Cr.		Draper						
County *	Country *	State/Region/Prov	vince *		Company			
	United States	Utah		~				
					Address 1 CAN	CEL		AVE

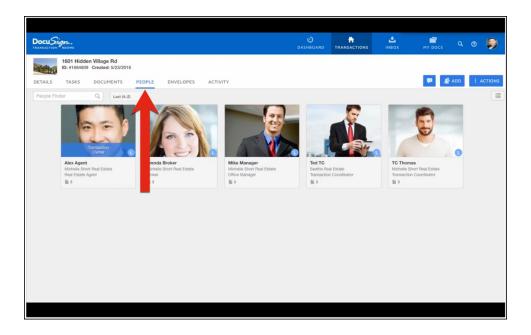
4. You can edit any of the fields in this Transaction Room as the information becomes available to you!

ANSACTION ROOMS	O DASHBOARD	TRANSACTIONS	LINBOX	MY DOCS		0	Ð
Torrey Pines Cr. Drage, UT 84020 14390 Torrey Pines Cr. Drage, UT 84020 10: 81767036 Created: 7/12/2018 ETAILS TASKS DCUMENTS PEOPLE ENVELOPES ACTIVITY					EDIT	: ACTI	1011
TRANSACTION INFORMATION Required to Close *				✓ SELLER 1		In	nvite
Name * Created By Torrey Pines Circle Alex Agent on 7/12/2018 at 2:38 PM	Status Active			Name			
Company Room Status Under Contract No	Side List Side			Home Phone			
MLS ID Origin of Lead				Cell Phone			
LOCATION Required to Close *				Business Phone			
Address 2 14390 Torrey Pines Cr.	City * Draper			Email			
County * Country * United States	State/Region/Prov Utah	vince *		Company			
Postal Code * Property Type 84020	Year Built			Address			
Special Circumstances None				✓ SELLER 2		In	nvite
סוגערו				Name			

5. From the **Documents Tab** you can see any of the documents associated with this DTR!

ETAILS TASKS DOCUMENTS	S PEOPLE ENVELOPES	ACTIVITY		🗭 🔝 ADD 🗄 ACTIO
Document Finder Q. Nam	e (A-Z) 🛛 🗸			Select All
TRANSACTION DOCS (4)				
The sum of the sector of the s	Hardware and the second sec	HERDENAL Han Salahan Han Sala		
7/5/2018 7	isting Agreement /5/2018	Mold Disclosure 7/5/2018	Sellers Disclosure 7/5/2018	
Alex Agent Michelle Short Real Estate	Alex Agent Michelle Short Real Estate	Alex Agent Michelle Short Real Estate	Alex Agent Michelle Short Real Estate	

6. From the **People** Tab you can define who is associated with this transaction!



7. If you would like to see all of the transactions you currently have. Select the **Transactions** Tab, which will show you all of the DTRs you are currently working!

