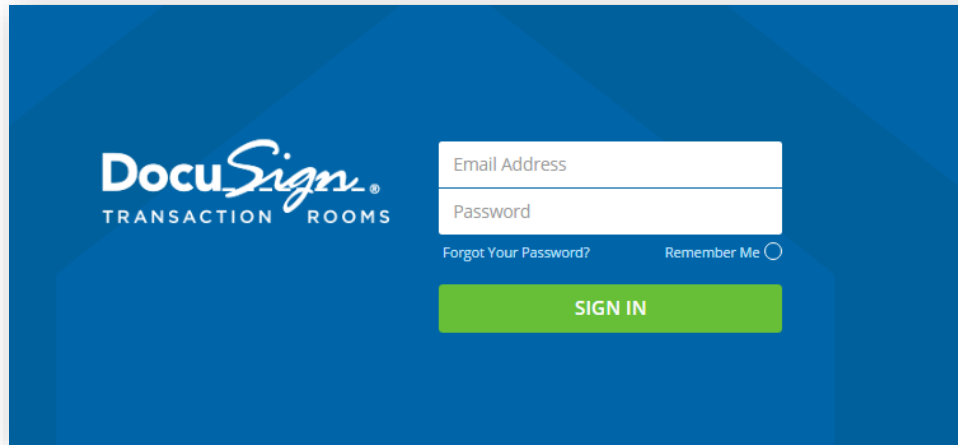


## How to Guide: Invited Participants



DocuSign Transaction Rooms is a Real Estate specific transaction management platform. The creator of the transaction is able to invite outside participants to collaborate and view documents that have been shared out.

Use this how to guide as a reference on how to sign up for Transaction Rooms, if invited, and a quick tour of the platform.

### DocuSign Transaction Rooms Quick Start Guide

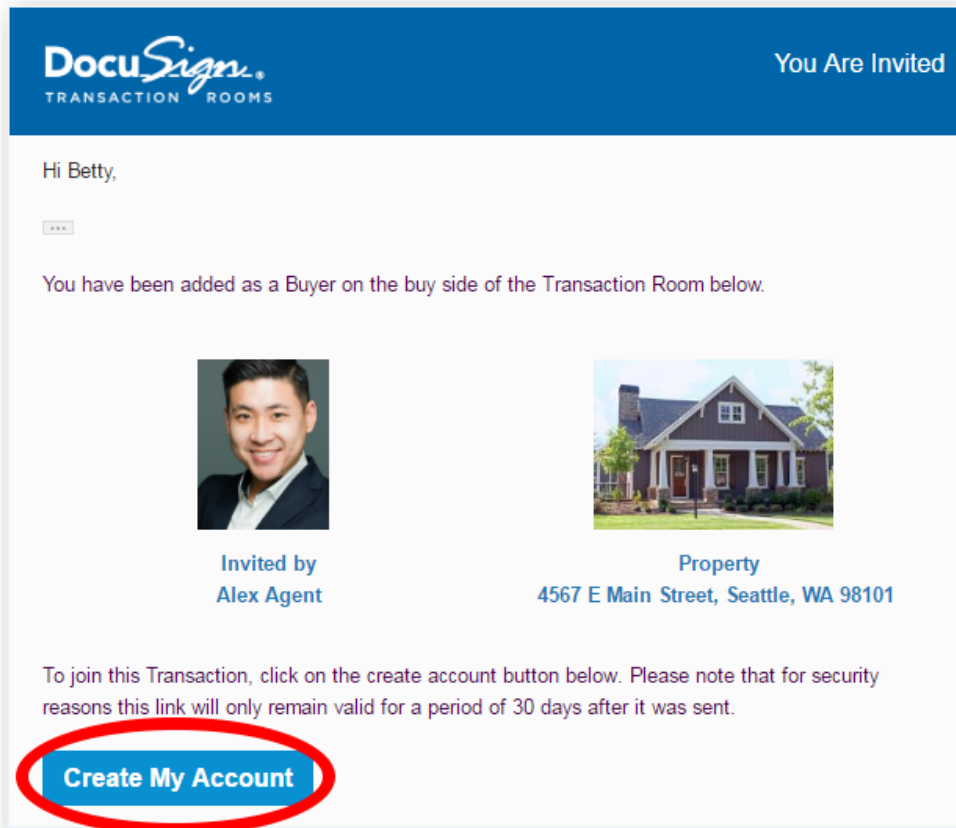
- [1] If invited to a Transaction Room you will receive an email with the subject line, **'You've been invited to join DocuSign Transaction Rooms'**.
- [2] Create an account by clicking on the link in the email.
- [3] Once you create an account, you will be directed to your personal **Dashboard**. On the **Dashboard** you will see the Transaction that you have been invited to.
- [4] Click on the Transaction from the **Dashboard** or click on the **Transactions Tab** in the blue header, and then click on the Transaction Room. In the Transaction you will be able to see basic property information and any documents that have been shared
- [5] Optionally, add documents that you need to share out with others, or view the documents that have been shared with you.
- [6] To manage your email notifications, click **My Account**, then click **Notifications**. Make sure to save any changes you make.

For more information, continue to the next page for a step-by-step guide.

## DocuSign Transaction Rooms Step-By-Step Guide

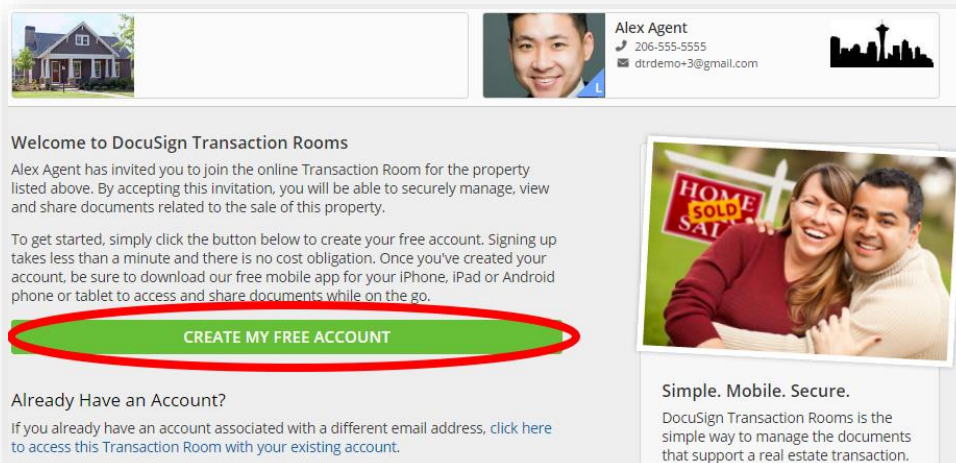
### Step One

If a user is inviting you to join a Transaction Room for the first time, you will need to activate a free account. You will receive an email with the subject line, **'You've been Invited to join DocuSign Transaction Rooms'**. Click on **'Create My Account'** to continue.



### Step Two

Next, you will be directed to the DocuSign Transaction Rooms page. You will see the Property at the top left, as well as the owner of the room on the top right. Click on **'Create My Free Account'**.



### Step Three

Enter in your Account Information, and then select **'Create My Account'**.

## Create your Account

I am a...  
Home Buyer

First Name  
Betty

Company  
(optional)

Confirm Email

Password

Have a promo code?

Last Name  
Buyer

Email

Country of Residence

Confirm Password

APPLY

By selecting the Create My Account button below, I agree to the DocuSign Transaction Rooms [Services Agreement](#).

✓ CREATE MY ACCOUNT

### Step Four

You will be automatically directed to the Welcome screen. Click **'Go To Sign In Page'** to login to your Transaction Rooms account.

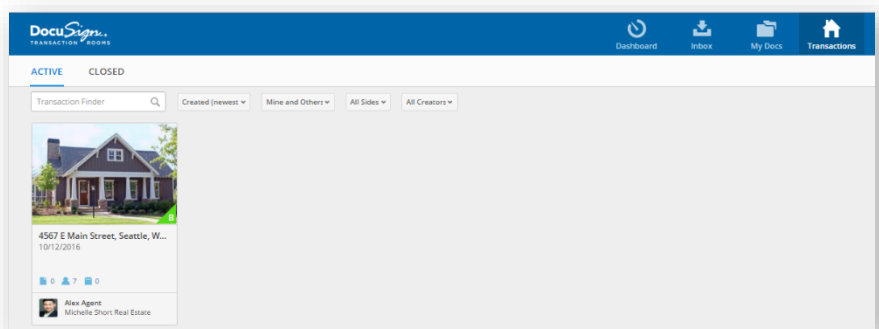
## Welcome!

Thank you for setting up your account! You'll be redirected to the sign in page now.

GO TO SIGN IN PAGE

### Step Five

Once you have logged in to the account, it will open up to the **Dashboards** tab. You can access the Transaction Room that you were invited to from the **Dashboards tab**, or alternatively, access the Transaction from the **Transactions Tab**. Click on the **Transactions Tab** at the top of the screen, and then click on the transaction tile.



## Step Six

When opening up a Transaction Room, you will always start in the **Details Tab**, and will see limited details surrounding the property. There are five tabs that make up the Transaction Room – **Details, Documents, People, Envelopes**, and **Activity**.

**NOTE: Envelopes are only available to paid customers**

The screenshot shows the 'Details' tab of a transaction room. At the top, there's a header with a house icon, the address '4567 E Main Street, Seattle, WA 98101', and the agent's name 'Alex Agent' with their ID and contact info. Below this is a navigation bar with tabs: DETAILS, DOCUMENTS, PEOPLE, ENVELOPES, and ACTIVITY. The main content area is divided into two sections: 'TRANSACTION INFORMATION' and 'LOCATION'. The 'TRANSACTION INFORMATION' section shows the Name '4567 E Main Street' and Status 'Active'. The 'LOCATION' section shows Address 1 '4567 E Main Street', Address 2, City 'Seattle', Country 'United States', State/Region/Province 'Washington', and Postal Code '98101'.

## Step Seven

The **Documents Tab** is where you can add documents that you need to share out with others, or access the documents that have been shared out with you.

The screenshot shows the 'Documents' tab of a transaction room. The header and navigation bar are the same as in the previous screenshot. The main content area shows a 'Document Finder' search bar and a list of documents under the heading 'TRANSACTION DOCS (2)'. Two documents are visible: 'Loan Status Disclosure' dated 10/12/2016 and 'Seller Disclosure Statement' dated 10/12/2016. On the right side, there's a sidebar with a city skyline icon and buttons for 'ADD' and 'Computer', along with a 'zipForm8' icon.

## Step Eight

In the **People Tab** you can see all of the other individuals apart of the Transaction, as well as add any additional participants. If you need to add any other people to the Transaction, you can add them via the Network, which is anyone you have worked with before, or via email, an individual you are working with for the first time.

The screenshot shows the 'People' tab of a transaction room. The header and navigation bar are the same as in the previous screenshots. The main content area shows a 'People Finder' search bar and a list of people under the heading 'Last (A-Z)'. Six people are visible: Alex Agent (Transaction Owner), Brenda Broker, Betty Buyer, Mike Manager, Molly Manager, and Ted TC. On the right side, there's a sidebar with a city skyline icon and buttons for 'ADD' and 'Add from Network', along with an 'Invite via Email' button.

## Step Nine

The **Activity Tab** shows the activity that has taken place in the Transaction Room. Activity such as, when someone gets added to the room and when documents are shared out. You can only see the activity that pertains to you. If another individual shares out a document to others in the room and *not* you, you will not see that activity.

**NOTE:** the 'owner' of the room changed below. This is because the original owner added another agent on the same side as you.

- (i.e. you are on the buy side, the agent added was the buyer's agent)

The screenshot shows the DocuSign interface for a transaction room. At the top, there's a header with a house icon, address "4567 E Main Street, Seattle, WA 98101", and agent information for "Alex Agent" (ID: #852501, 10/12/2016). To the right is a profile for "Abby Agent" (Real Estate Agent, 206-555-1243, abby.a.gent.dtr+1@outlook.com). Below the header is a navigation bar with tabs: DETAILS, DOCUMENTS, PEOPLE, ENVELOPES, and ACTIVITY (which is selected). An "ACTIONS" button is on the right. The main area is titled "TRANSACTION ROOM ACTIVITY" and contains a table of events.

	DATE / TIME
Abby Agent Added by Alex Agent	10/19/2016 11:20 AM
Seller Disclosure Statement Shared by Alex Agent	10/19/2016 11:00 AM
Loan Status Disclosure Shared by Alex Agent	10/19/2016 11:00 AM
Betty Buyer Added by Alex Agent	10/18/2016 4:07 PM

For more information, check out DocuSign's Support Site: <https://support.docusign.com/>