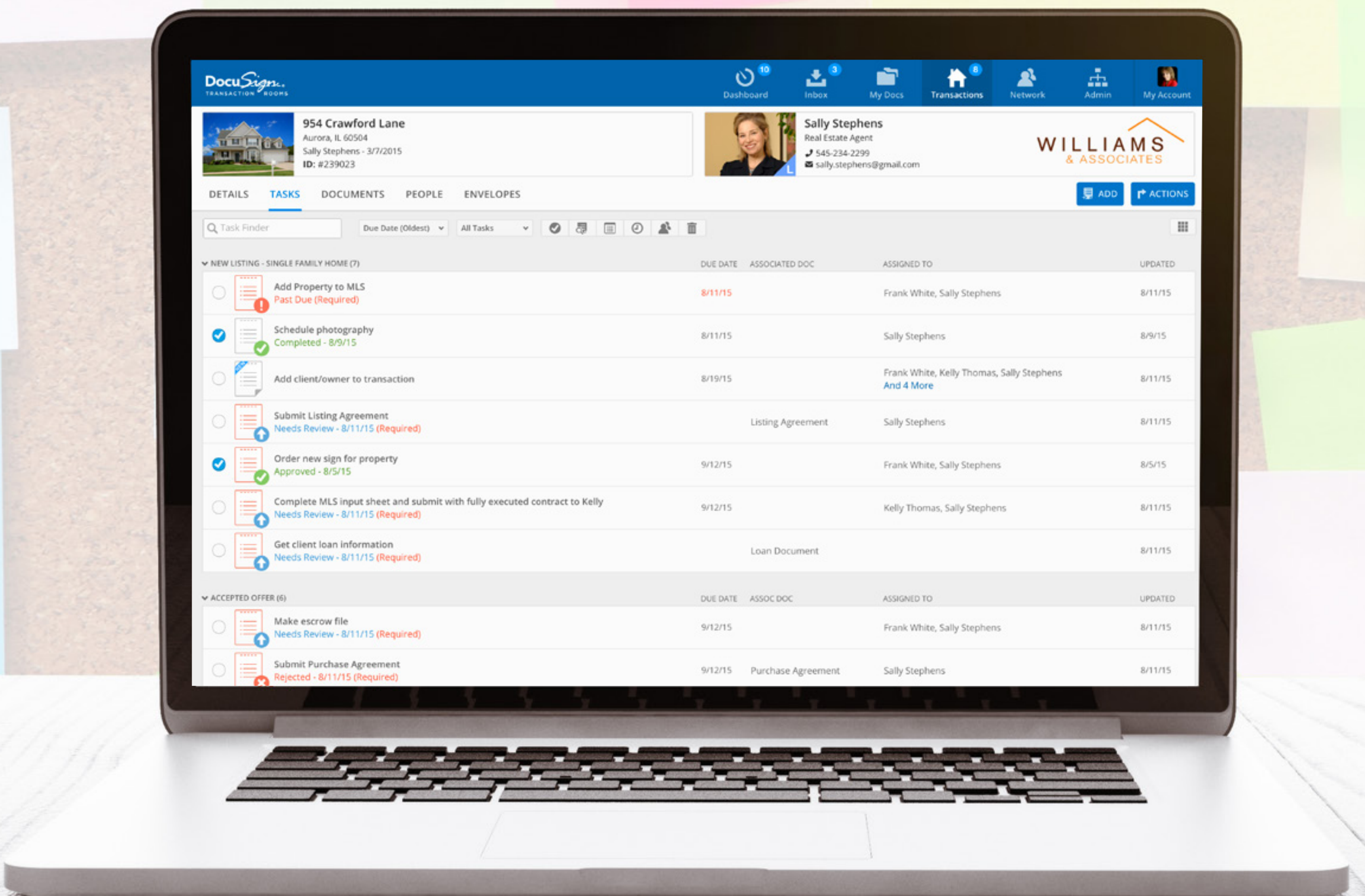
DocuSign for Real Estate

Get the facts on tasks

Learn more about our latest DocuSign Transaction Rooms update for Broker Edition Users.



Asked and answered

Our latest release for DocuSign for Real Estate PLUS, Broker Edition users enhances the document checklists you're used to by including tasks that may not necessarily involve paperwork. Check out the answers to some questions you might have about the update.

Who does this latest update affect?

The latest update affects brokers, transaction managers, and agents who use DocuSign Transaction Rooms as part of DocuSign for Real Estate PLUS, Broker Edition.

Will this update be on mobile devices?

Soon. The current update affects the web application only at this point, but a mobile release is planned in the coming weeks.

What happens to my current document checklists?

All of your current checklist templates will be converted to the new format automatically. You will not need to start from scratch with your current templates.

How are task templates different from checklist templates?

Think of task templates as enhanced checklist templates. In addition to items associated with documents, task templates allow you to schedule tasks that are not necessarily linked to the completion of paperwork, such as placing a sign in a yard or buying client gifts.

Does every task have to be approved by a manager?

No. Much like the old document checklists, some tasks may be required or optional, depending on the preference of your brokerage.

If you add more than one person to a task, can either one complete it?

Yes. More than one person can be an assignee to a task. Anyone who is assigned a particular task can complete the task and submit for review if required.

Can I assign a task to anyone?

Tasks can be assigned to anyone involved in the Transaction Room. When creating tasks in the template, assignees and watchers are based on roles (e.g. buyer's agent). When a template is applied to a Transaction Room, if Jane Smith is the buyer's agent, she will automatically be assigned the tasks for that role. At the individual Transaction Room level, when a specific person is known, in this case, Jane Smith, tasks can be applied directly to Jane, rather than the generic role.

Note: Assignees are those who are responsible for completing the task. Watchers are individuals who are notified when tasks are marked as complete or incomplete.

Can agents edit or delete tasks?

It depends. The person who creates a task can select the options that allow or prevent an agent (or other assignee) to edit or delete a task.

Can everyone see the task templates?

Anyone within the brokerage that owns the Transaction Room who has access to the room can view all tasks associated with that transaction. This can include clients. Users who have access to the Transaction Room, but aren't part of the brokerage that owns the room, can only see tasks in which they are an assignee or watcher. If a user from outside of the brokerage isn't an assignee or watcher, they will not see the Tasks tab in the Transaction Room.

Can you create task templates for specific regions or offices?

Yes. Different offices or regions might require different documents or varying actions that must be taken in order to close a transaction. Task templates can be applied globally or to specific regions or offices.

How do you set a due date for a task?

Due dates for task completion can be set up in the task template, or from within the task in a Transaction Room. From the task template, due dates are dynamic and are based on the individual transaction data. For example, if a task must be completed five business days before the expected closing date, you would select Expected Closing Date from the menu within the task and then click to -5. If the expected closing date would happen to change, the due date would reflect that change as well.

When selecting a due date for an individual task already applied to a Transaction Room, or if you want to apply a new task that isn't part of the task template, you will see the additional option to choose a specific due date.

Can specific due dates be added to each task?

Yes, at the individual Transaction Room level. Due dates are dynamic when creating a task template. Once a task template is applied to a Transaction Room, however, you can choose to use a specific due date instead of basing it on a number of days before or after an event in the transaction (such as listing date, expected closing date, etc.).

How do I know what tasks are coming due? Are there reminders for upcoming tasks?

All tasks and their due dates will appear in the Tasks area of your Transaction Room. By default, reminder emails will be sent when the task is due in seven (7) days. You may also choose custom dates to automatically send email reminders for any individual task, and you can send an immediate reminder email from any task aside from the previously specified custom dates.

What happens if you change the closing date? Does the task due date change automatically?

Yes. If you choose a due date in the task template based on a particular event in the transaction (such as listing date, expected closing date, etc.) and that event date changes, the due date will adjust accordingly. For example, if a task is due five days after the contract date, and you discover the date was incorrectly listed in the Transaction Room, any change made to that date will subsequently change the task due date automatically.

Do you have to apply a task template to a Transaction Room? Can you add an individual task to the room?

You can add individual tasks to a Transaction Room without applying a template. Additionally, you can apply a task template to a Transaction Room, then add or delete tasks to or from that Transaction Room without affecting the template.

Can you have multiple documents in a single task?

Only one document can be associated with an individual task, though that document can have multiple pages.