

DocuSign Transaction Rooms

Lone Wolf Integration Release Notes

Updated December, 2017

DocuSign is incredibly excited to share we have deepened our partnership with Lone Wolf so you can more seamlessly pass data from Transaction Rooms to brokerWOLF anytime, and as many time as you want! This integration is intended to save you time and eliminate mistakes that result from re-entering data – it's available for all brokerages to take advantage of today!

The following sections will teach you how to:

1. Set up the integration – **NEW: Add more contacts to send to Lone Wolf**
2. Submit transaction details to Lone Wolf
3. Answer frequently asked questions

1. SETTING UP THE INTEGRATION

1. If you have a Transaction Rooms and brokerWOLF account and you want to take advantage of the integration, reach out to your DocuSign Account Manager and let them know.
2. Your Account Manager will send you the Lone Wolf Partner Order Form via DocuSign for you to fill out and sign.
3. Your Account Manager will take care of the rest. The activation process can take 2-5 days. Once activation is completed you should see Lone Wolf data fields in the Details tab of every Transaction Room and the Company Admin will see the same in the Transaction Details section of the Company tab.

LONE WOLF TRANSACTION	Use	Visible to All	Required to Create	Required to Submit
Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Classification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Property Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

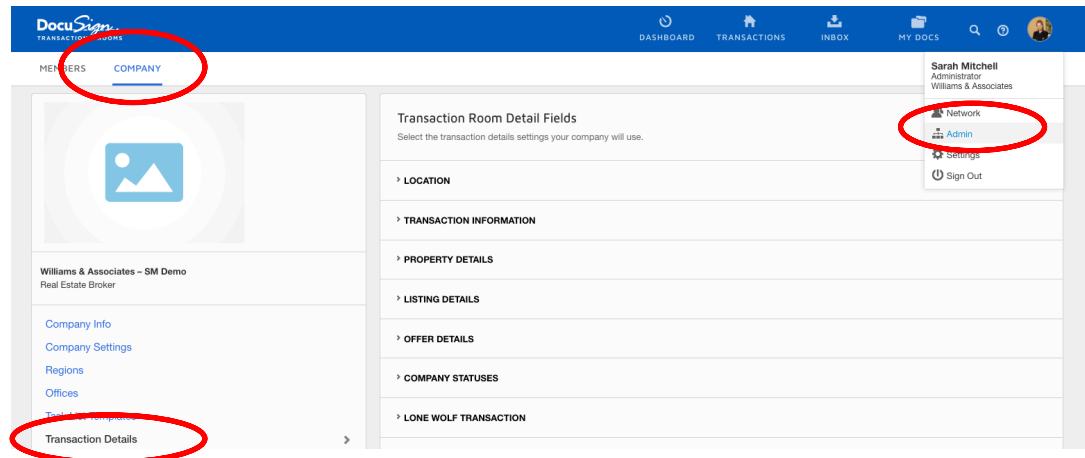
Mitchell Family					
DETAILS TASKS DOCUMENTS PEOPLE ENVELOPES ACTIVITY					
▼ LONE WOLF TRANSACTION					
Number		Classification		Property Type	
▼ LONE WOLF AGENT COMMISSION					
Agent Commission Agent Name		Agent Commission Side		Agent Commission Side Count	

4. Once the integration is activated, the System Admin of the Transaction Rooms account can go to the Company Settings section under the COMPANY tab to determine who can push transaction data to Lone Wolf. In the Agent Permissions section you will see the “Agents can send updates to Lone Wolf” permission. If the circle is checked, Agents will be able to submit transaction details data to Lone Wolf. If the circle is not checked, Agents will NOT be able to submit transaction details data to Lone Wolf; in this case, only a Manager with permission to manage or approve Transaction Rooms can submit data to Lone Wolf.

The Simpsons Real Estate Broker	Agent Permissions Global settings for all Agents under this account.
Company Info	Agents can delete Transaction Rooms <input checked="" type="checkbox"/>
Company Settings >	Agents can delete Transaction Room documents or move documents between Transaction Rooms <input type="checkbox"/>
Regions	Agents in a Transaction Room automatically see documents added to that Transaction Room by their Manager(s) <input type="checkbox"/>
Offices	Agents can send updates to Lone Wolf <input checked="" type="checkbox"/>
Task List Templates	
Transaction Details	
Titles	

5. **NEW:** Add more contacts to the Details tab of a Transaction Room and send the data to Lone Wolf.

- As the System Admin, go to **Admin, COMPANY**, and then the **Transaction Details** section.



- Click Add Field.
- Select the type of Data Field, enter the Display name, and then click the Lone Wolf Data Integration drop down and select the matching contact type.

A screenshot of the 'Add Field Group' dialog box. It has a white background with a dark blue header. The dialog contains three sections: 'Data Field Type' with a dropdown menu showing 'Select a Data Field Type'; 'Displayed Field Name' with a text input field showing 'Enter New Field Name'; and 'Lone Wolf Data Integration' with a dropdown menu showing 'Do Not Send Data'. At the bottom right, there are two buttons: 'SAVE' (blue) and 'CANCEL' (white).

- The additional contact will now appear on the Details tab and can be passed to Lone Wolf when information is added or edited.
- Similarly, you can update existing contacts to start sending them to Lone Wolf. Click **Edit** next to the contact and then select the matching contact type in the Lone Wolf Data Integration dropdown.

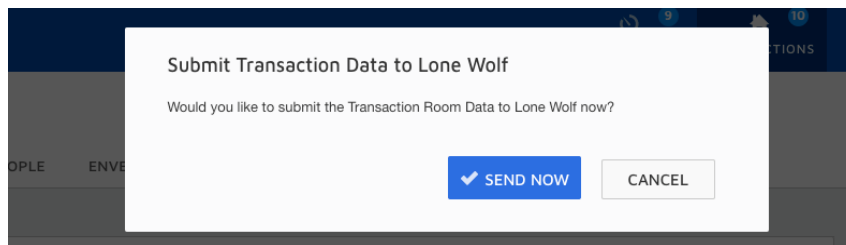
2. SUBMITTING TRANSACTION DETAILS TO LONE WOLF

1. Open a Transaction Room to the **Details** tab.
2. At a minimum, fill in the following data fields in the Details tab:
Classification, Property Type, Address, Contract Amount*, Actual Close Date, Offer Date, Agent Commission Name, Agent Commission Side, Agent Commission Side Count, and Agent Commission.


NOTE: Required fields are indicated with a red asterisk and labeled Lone Wolf



Address 1 * Lone Wolf
123 Main Street


3. When you click Save, you will be asked if you'd like to send the transaction data to Lone Wolf. Click SEND NOW. Clicking CANCEL will save the data in Transaction Rooms but will not send the data to Lone Wolf.



4. As you continue to add and update data in the Details tab of the Transaction Room, you will be given the option to send the updates to Lone Wolf. You can make as many updates as you need to.
- NOTE:** Updates to the commission must be made in Lone Wolf.
5. When the details have been successfully sent to Lone Wolf, a green banner will appear and confirm the action.
6. The activity is tracked in the Transaction Room Activity log and will show who submitted the details to Lone Wolf and when.

**123 Main Street**
ID: #913930 Exp Closing: 11/16/2017

DETAILS TASKS DOCUMENTS PEOPLE ENVELOPES **ACTIVITY**   ACTIONS

TRANSACTION ROOM ACTIVITY		DATE / TIME
 123 Main Street, Naperville, IL 60563 Details Submitted to Lone Wolf by Rob Brown		12/01/2017 3:26 PM

- When a Transaction Room is submitted for final approval with a status of Property Sold, the Manager reviewing the room is given one last opportunity to submit updates to Lone Wolf if they approve the room to be closed.

The screenshot shows a modal dialog box titled "Approve Transaction Room" with a blue checkmark icon. The text inside reads: "Confirm you wish to approve this Transaction Room. It will then be closed and the owner notified." Below this is a card for the "Mitchell Family" with a small image of a house, the address "123 Main Street, #102, Naperville, IL 60563", and the date "Waylon Smithers - 7/20/2016". There is a text input field labeled "Comments (optional)". At the bottom left, there is a checked checkbox labeled "Submit Transaction Details to Lone Wolf". At the bottom right, there are two buttons: a green "APPROVE" button and a grey "CANCEL" button.

*If Contract Amount is not available, Transaction Rooms will send the Listing Amount to Lone Wolf in order to create the transaction in brokerWOLF. If both the Contract Amount and Listing Amount are not filled out in Transaction Rooms, a transaction in brokerWOLF cannot be created.

3. FREQUENTLY ASKED QUESTIONS

What fields are required to have data sent to Lone Wolf?

Classification, Property Type, Address, Contract Amount*, Actual Close Date, Offer Date, Agent Commission Name, Agent Commission Side, Agent Commission Side Count, and Agent Commission are the minimum required fields to initiate a transaction in Lone Wolf. **If Contract Amount is not available in Transaction Rooms the Listing Amount will be used. If both the Contract Amount and Listing Amount are not filled out in Transaction Rooms, data cannot be sent to Lone Wolf.*

Who can fill in Lone Wolf data fields in Transaction Rooms?

Any Transaction Rooms user who has permission to fill in data in the Details tab can fill in the Lone Wolf data fields i.e. any owners of the Transaction Room or Broker Managers who have access to the Transaction Room.

Who can push data from Transaction Rooms to Lone Wolf?

If the “Agent can send updates to Lone Wolf” permission is turned on by the System Admin, any owners of the Transaction Room can push data to Lone Wolf when Lone Wolf fields are filled out or edited. If the “Agent can send updates to Lone Wolf” permission is turned off by the System Admin, only a Manager with the permission “Can manage Transaction Rooms” or “Can approve Closing of Transaction Rooms” can push data to Lone Wolf.

When does the data transfer from Transaction Rooms to Lone Wolf?

Immediately, there is no wait!

How many times can you update information in Transaction Rooms and send it to Lone Wolf?

Users can update the information as many times as they need to.

Can data from Lone Wolf be pushed to Transaction Rooms?

Not today. Our integration only allows for data to be pushed from Transaction Rooms to Lone Wolf.

Is everything tracked in the Activity Log?

Yes, every time details are updated, saved, and submitted to Lone Wolf it is tracked in the Activity Log.

What types of Transaction Rooms can submit data to Lone Wolf?

List side, Buy side, and Duel side Transaction Rooms can submit data to Lone Wolf, Refinance Transaction Rooms are not able to submit data to Lone Wolf.

Once a Transaction Room is closed, can I edit the details and submit to Lone Wolf again?

To do this you need to re-open the Transaction Room, make the updates and submit them to Lone Wolf, and then close the Transaction Room again.

Do I have to fill out all of External Agent information?

If you fill out any of the External Agent fields, then you must also complete the External Agent Contact Type ID, External Agent End Code, and External Agent Commission. However, you are not required to add any External Agent information.

Will I be able to send multiple updates to Lone Wolf from all of my Transaction Rooms?

The ability to send multiple updates to Lone Wolf will only be available for Transaction Rooms created after the release of this new functionality.