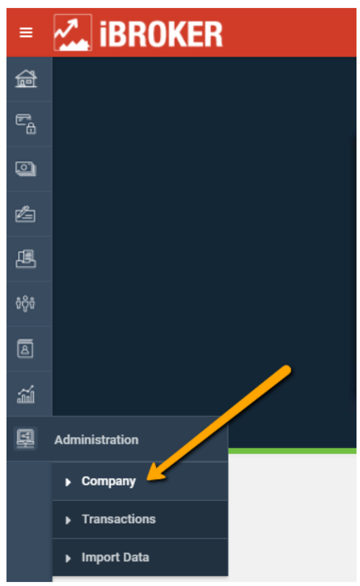
Streamlining real estate transaction management with iBroker

Users of DocuSign Transaction Rooms can connect their account to iBroker and seamlessly integrate into iBroker's transaction module. Office administrators using both applications will enjoy a streamlined process eliminating the need for double entry. Note - This feature is available to all Brokerage-level accounts.

Connecting to iBroker

Connecting DocuSign Transaction Rooms to iBroker is a quick and easy process. Follow these 3 steps to set up the integration:

1. From the main menu on the left side of iBroker, go to **Administration > Company**



2. Next, go to the **3rd Party Connections** tab and **select an office** in your brokerage. If your brokerage only has one office, it will already be selected for you.

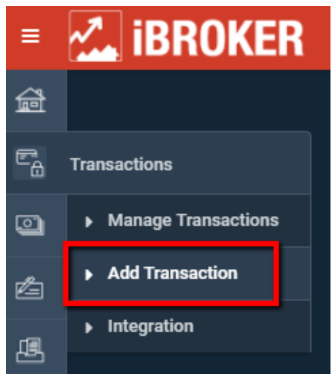
3. Enter the **API Key**. You can obtain the API Key from your DocuSign Transaction Rooms profile.

4. Next, go back to where you were in iBroker (Administration > Company > 3rd Party Connections tab), ensure you selected your office from the dropdown list (as per #2 above) and right click into the API Key box. Click Paste. Then, click **Connect.** The integration is now complete!

Turning DocuSign Transactions into iBroker Transactions

Converting your DocuSign transactions into iBroker transactions is as easy as it gets.

1. First, make sure your transaction information is complete and finalized. (Once a DocuSign transaction is in iBroker and you make changes to that same transaction in DocuSign Transaction Rooms, it won't update the associated transaction in iBroker. You would need to do so manually.
2. Then, in iBroker navigate to **Transactions > Add Transaction**.



3. Here you will have the option to select a transaction you'd like to convert to a transaction. To convert a transaction, select the office to which the agent belongs and hit **Refresh**. Then, click on your desired transaction. iBroker will instantly create a new transaction with all the details for that transaction auto-populated from DocuSign Transaction Rooms. All you need to do is fill in the blanks and save the transaction. Congratulations!

Frequently Asked Questions

Q: At what point can I sync a transaction to create a new transaction in iBroker?

A: In iBroker, you have the ability to enter transactions in Pending status before they are closed. However, we recommend you sync Transactions when you are sure all information is complete and up to date, since you will not be able to sync a transaction more than once. For example, if an agent updates information for a transaction after the transaction is synced in iBroker, you will not be able to sync again to update the information. Instead, you will have to update the information in iBroker directly. Note: You can sync Transactions for all statuses except for Archived.

Q: What transaction information gets brought into iBroker?

A: Here is a table of all the data fields we bring into iBroker from your transaction:

DocuSign Transaction Rooms Field	iBroker Field	Category
Street Name	Street Name	Property Info
State Or Province	State/Prov	
Street Number	Street #	
City	City	
Property Address Country	Country	
Postal Code	Postal/Zip	
Purchase Price	Sale Price	
Contract Date	Offer Date	
Closing Date	Close Date	
Email	Email	Participant Info
Street Name	Street name	
City	City	
State/Prov	State/Prov	
Name	First Name, Last Name	
Company Name	Name	
Phone	Work	
Unit Number	Apartment/Unit	
Zip/Postal Code	Postal/Zip	
Cell Phone	Mobile	
ID	No match	
Fax	Fax	
StreetNumber	Street #	
Sale Commission Split $ - Buy Side	Selling Commission $	Commission Info (if applicable)
SellSideSaleCommissionSplit	Listing Commission %	
Sale Commission Split $ - Sell Side	Listing Commission $	
BuySideSaleCommissionSplit	Selling Commission %	

Q: What DocuSign Transaction Rooms account must I have to integrate iBroker?

A: You will need any Brokerage Level DocuSign Transaction Rooms account to integrate with iBroker. Since agents do not login to iBroker, individual agent level accounts will not be supported.

Q: If I update a transaction in iBroker, does it update the transaction in DocuSign Transaction Rooms?

A: It does not. The sync is one way from DocuSign Transaction Rooms to iBroker. iBroker does not send data into DocuSign Transaction Rooms.

Q: Is there any cost for the integration of iBroker with DocuSign Transaction Rooms?

A: There is no additional cost involved to set up the integration.

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