DOTLOOP BASICS

- Dotloop is our paperless transaction software.
- You will keep all paperwork for each transaction in your loop, our office will do compliance from your Loop- the only paper you ever turn in is an EMD and your closing package!
- Dotloop will do esignatures to make the signing process quick and safe.

How do I get to Dotloop?

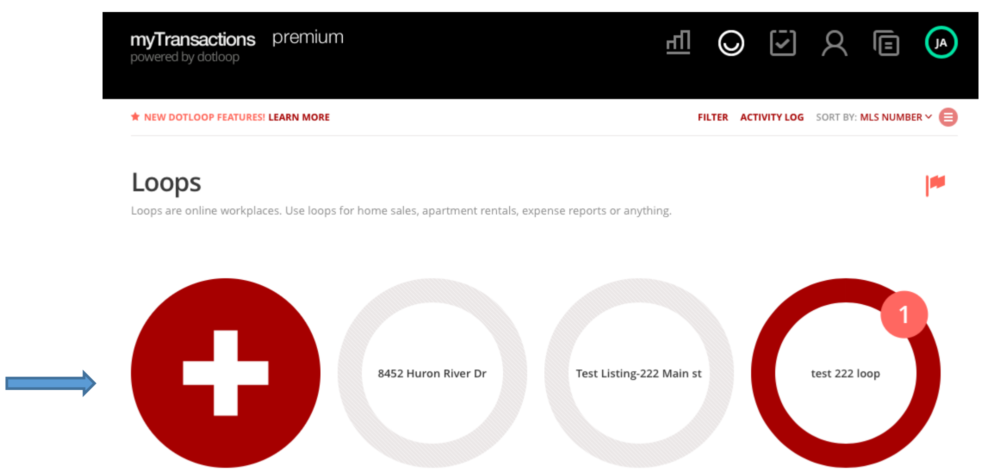
~In KW: From your eEdge control panel, click on the link directly below “myTransactions”

~DOTLOOP.com: You can login to dotloop from their site directly. Go to SIGN IN, use your mykw.kw.com email and password to login, if you do not have your password, please ask for a password reset.

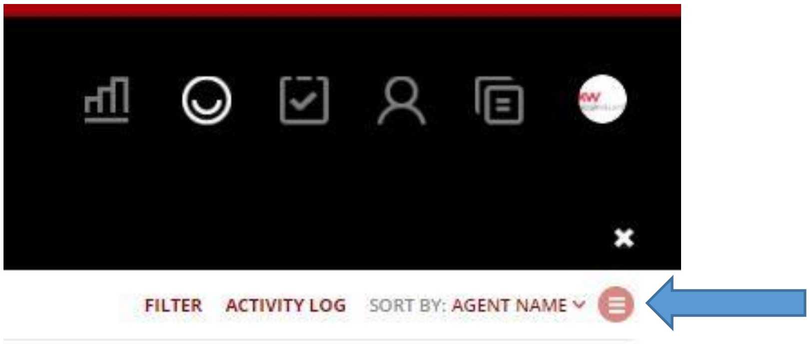
~Dotloop App: You can download the dotloop app from the app store on your phone. Sign in with the email that you are using in dotloop, if you do not have your password, please ask for a password reset.

Creating a LOOP

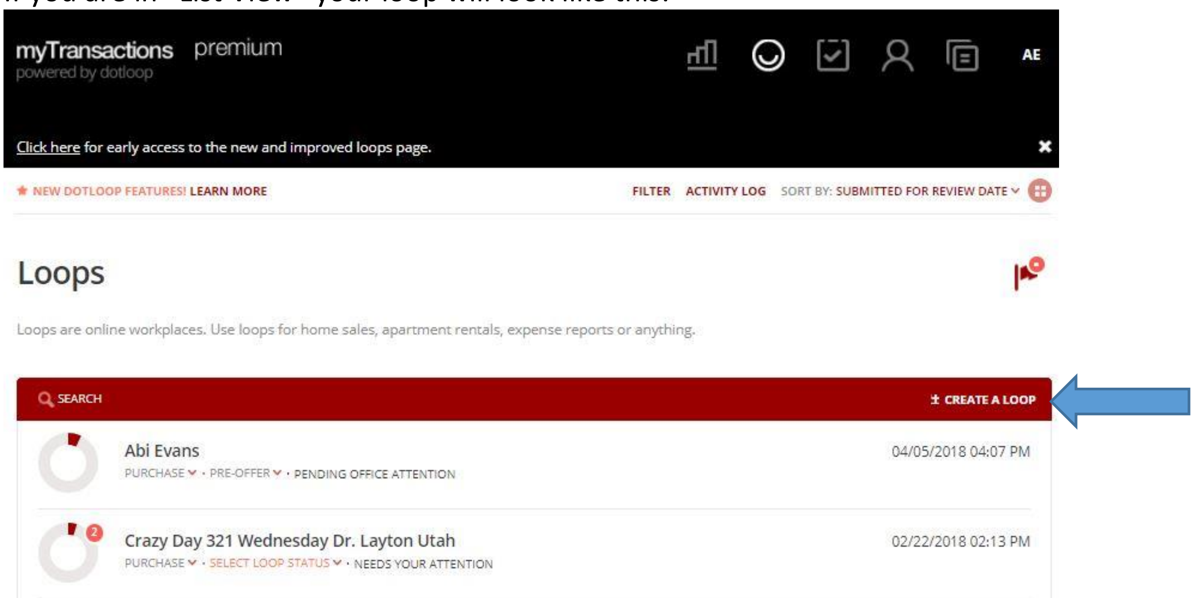
- To Create a Loop, click on the circle with the half circle inside.



- You can change the view of your loop to “List View” by clicking the small circle on the right hand side, located under your dashboard.



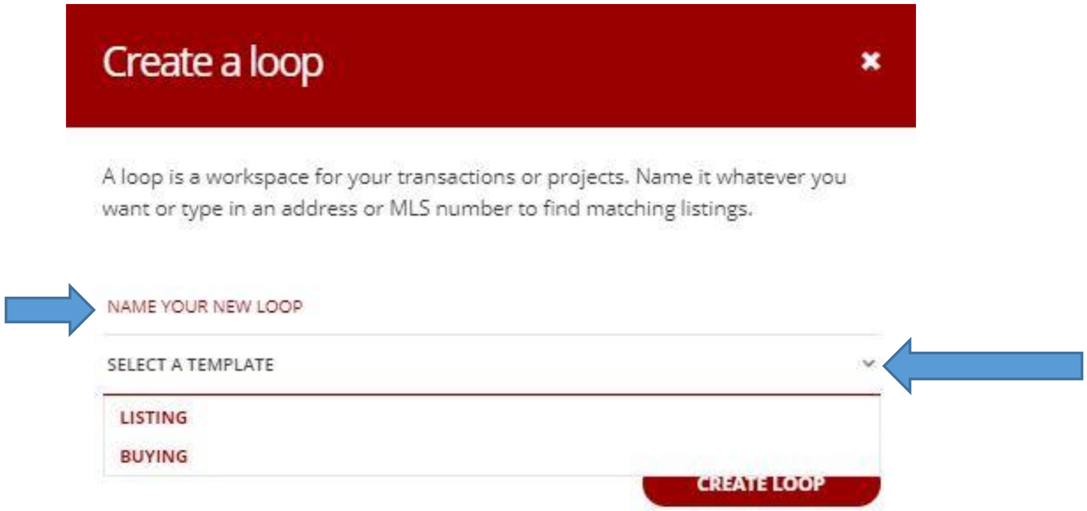
- If you are in “List View” your loop will look like this:



- Click on the “ + “ to create a NEW Loop

NAMING your Loop

- LISTING: Type the address of your listing, Google maps will verify the address and autofill address info into your loop
- BUYERS: Name the loop with buyers first & last name. When under contract on a property, you can rename the loop the property address (the MCA may update this for you automatically)
- After naming your loop, select a template – either Listing or Buying. This will auto load all of your required documents into the loop
- After selecting your template, press Create Loop

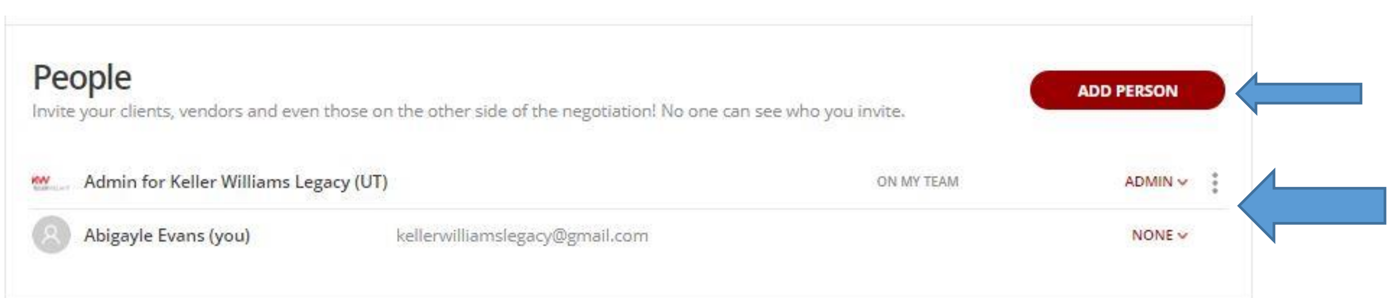


BUILDING a Loop

- Right under the loop name, choose a Transaction Type and then Select Loop Status so you and the MCA know what type of transaction this is. If you are not under contract yet, select Pre-Listing. If you are under contract select Under Contract, Sold, etc.. If you would like to “Delete” your loop, change the status to Archived

ADDING PEOPLE

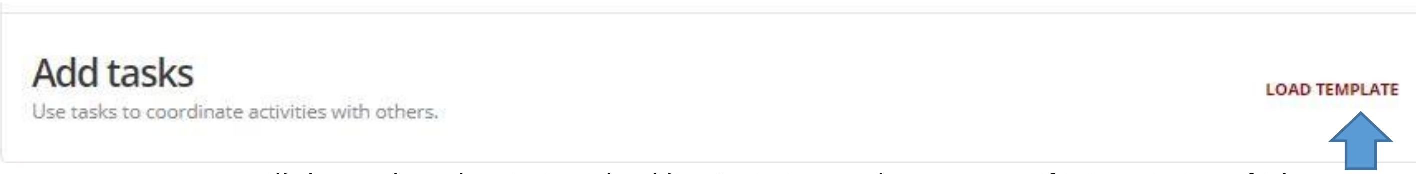
- For e-signatures- adding people first will put them in the appropriate places on docs.
- Scroll down the page until you find, PEOPLE in your loop.
- You will automatically be added as the owner of the Loop. Choose your ROLE on the dropdown to the right.
- The ADMIN for the office will also be added automatically- this is how they will do compliance on your loop.
- ADD YOUR CLIENTS and anyone else you would like to have access to your loop
  -You only need 1st and Last name to enter. Email address needed for esignatures
  -If more than 1 person is signing docs, they MUST HAVE DIFFERENT EMAIL ADDRESSES



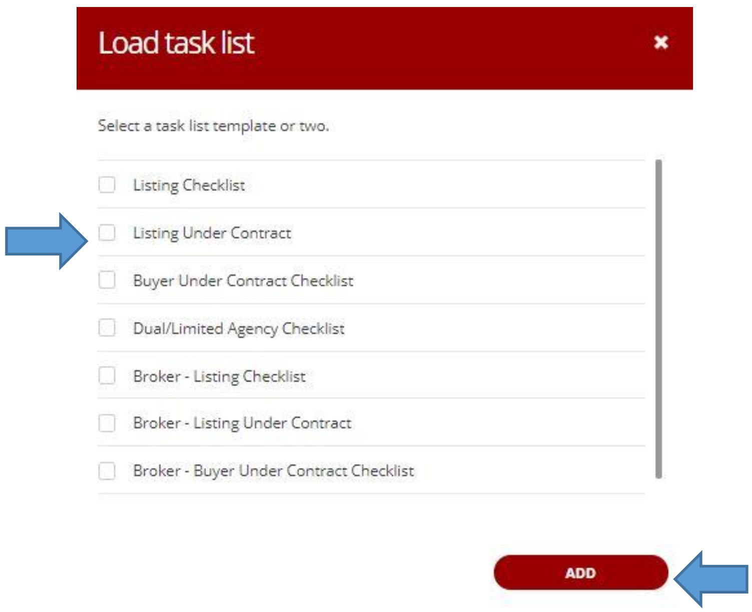
Adding TASKS/LOAD TEMPLATE

Loading the Templates allows you to know exactly what required documents you need in your loop. Think of it as a virtual checklist.

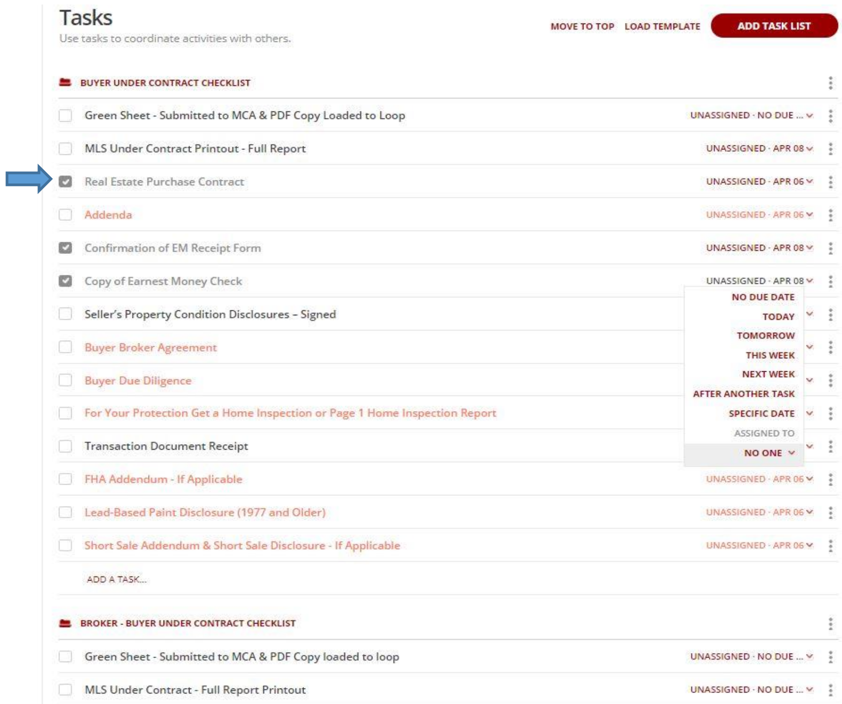
- Underneath the People section you will see Add Tasks. On the right hand side click on Load Template.



- You will then select the Listing Checklist & Listing Under Contract if it is a Listing. If it's a Buyer select Buyer under contract. If you are representing both sides select, Dual/Limited Agency.
- Next, add the appropriate "Broker-Checklist". This is what Blaine and Jacqui our Virtual Assistant use to keep track of your transactions. Once they have received a file they will check it off as complete.
- After selecting the appropriate templates, click on the Add button. This will copy them to your loop.

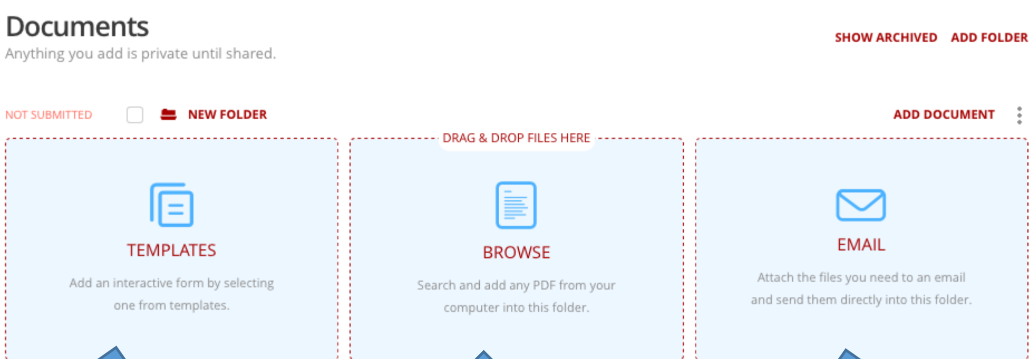


- As your documents get signed and completed be sure to scroll to the bottom of the page and mark them off as completed.



ADDING DOCUMENTS – 3 Ways to do this…

Please Note: ***Dotloop will only accept a PDF documents***

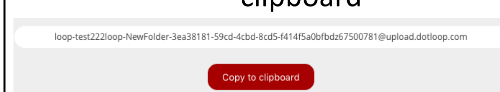


Templates will update your loop with KW docs that are in the system. We have set up form sets for you based on transaction type. There is also customization you can do to add your own PDF's to these templates.

Browse will take you to your hard drive to upload any PDF needed

Email documents (PDF ONLY) to your loop directly from your email!

1.Copy this loop address directly to your clipboard



2.Forward your email and PASTE the copied dotloop address in the TO: field of the email you are forwarding. Hit SEND

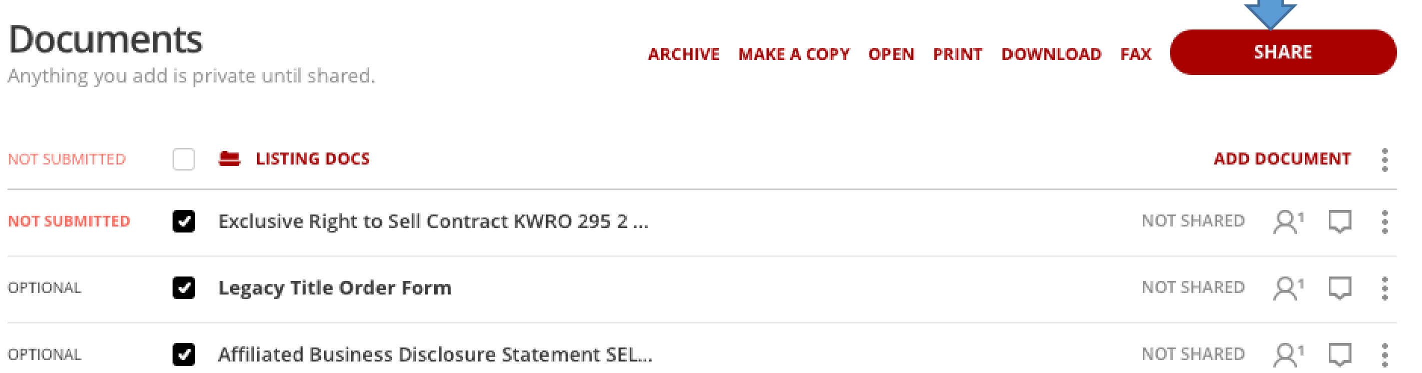
-You will get a notification that a doc was sent to your loop.

-Refresh your Dotloop screen to see the sent document.

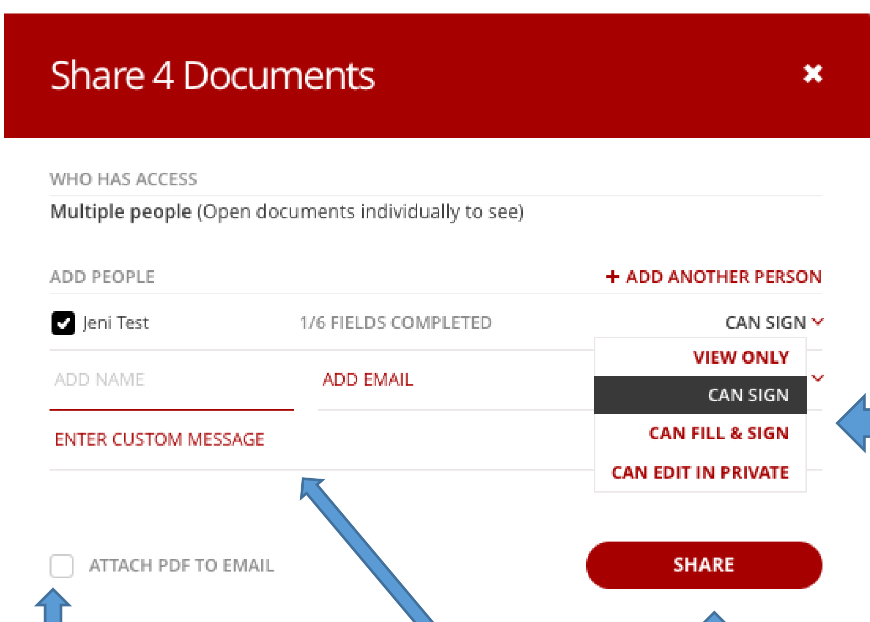
SHARING (e-signing) documents

- Once docs have been updated, you can share with clients for signatures.
- Sharing one document will send an email for each SHARE or you can batch docs together for esignatures.
  -Click "SHARE" on the document to just send one
  -Check the boxes in a group of documents to be SHARED together.

Click SHARE for more options on documents to be signed



You can now give signing authority to your clients



Give clients the access they need to complete docs

Check the box to include a PDF of the documents to sign

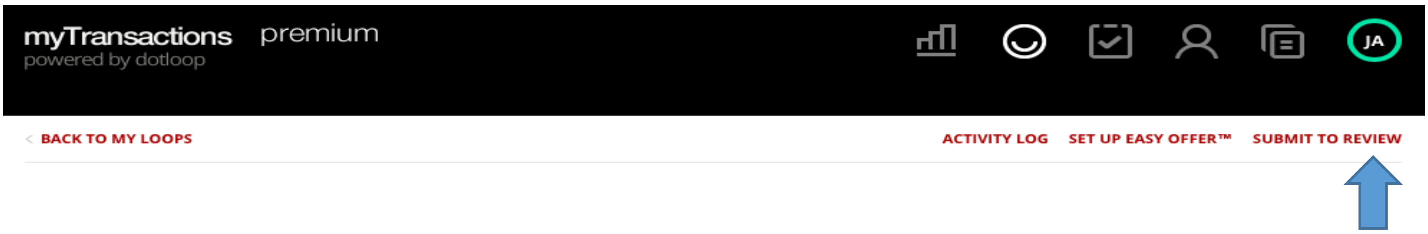
Enter a message that will be included on your email

Click SHARE when you are ready to send docs through an email

SUBMIT to the MCA (Market Center Administrator)

- Once your loop is ready to be reviewed by the MCA (they will do compliance directly through your loop) you can Submit to the office right from your loop.
  -A loop is complete when all required KW docs are in the loop and signed by all parties.

- From the loop you are working in, click on SUBMIT TO REVIEW in the upper right hand corner
- **Please submit your loop within 3 days of going under contract or after getting a listing. And then again in the middle of the transaction as well as 3 days before closing. This will ensure that your files are getting reviewed in "real time"**



DOTLOOP MISC HOW TO's

- What if I need to delete a document of file?
  - In Dotloop they like to keep a "paper trail", so there is no delete button. Instead you can Archive it. Do this by pressing the 3 dots on the right hand side of that document. There will be a drop down where you can select, "archive."
  - If you need to bring an archived document back, on the top right side of the page, next to Add Folder, select Show Archived.

- How do I rename a loop?
  - Click on the 3 dots on the right hand side of the document and select Rename.

- How do I change or add Contract Dates and Other Offer Information?
  - Under the Title, next to "select loop statues" select View Details
  - On this page you can edit the Property Address, People, Contract & Offer Dates, etc..
    - **Under the Contract Date Section, PLEASE update the CLOSING Date so we know when this file will be closing. If it is closing earlier/later than expected remember to update it here!**

DOTLOOP HELP

If you have any questions the MCA will be teaching 2 Dotloop/Greensheet classes a month!

Also Scott Le Roy Marketing is a great resource. They have many step by step tutorials set up to help you! Visit. www.scottleroymarketing.com , KW Rescources, Training. If it asks for a MC # or Password it is: 1035

Here is their Dotloop 101 Class:
https://www.kwconnect.com/details/dotloop-101-with-scott-le-roy-4

Also, at the bottom of EVERY menu option in dotloop, there is a help screen for you to access.

PUT THE SUPPORT PHONE NUMBER AND MEMBER ID IN YOUR CONTACTS!!! If you are locked out of dotloop, this will be the fastest way to get into your dotloop system if resetting your password doesn't work.

The HELP CENTER has great online training for Agents. In the AGENTS section, there are short videos/training by subject. In the TRAINING link you can watch previously recorded webinars or sign up for upcoming dotloop training webinars.