

DotLoop Client Guide

Introduction

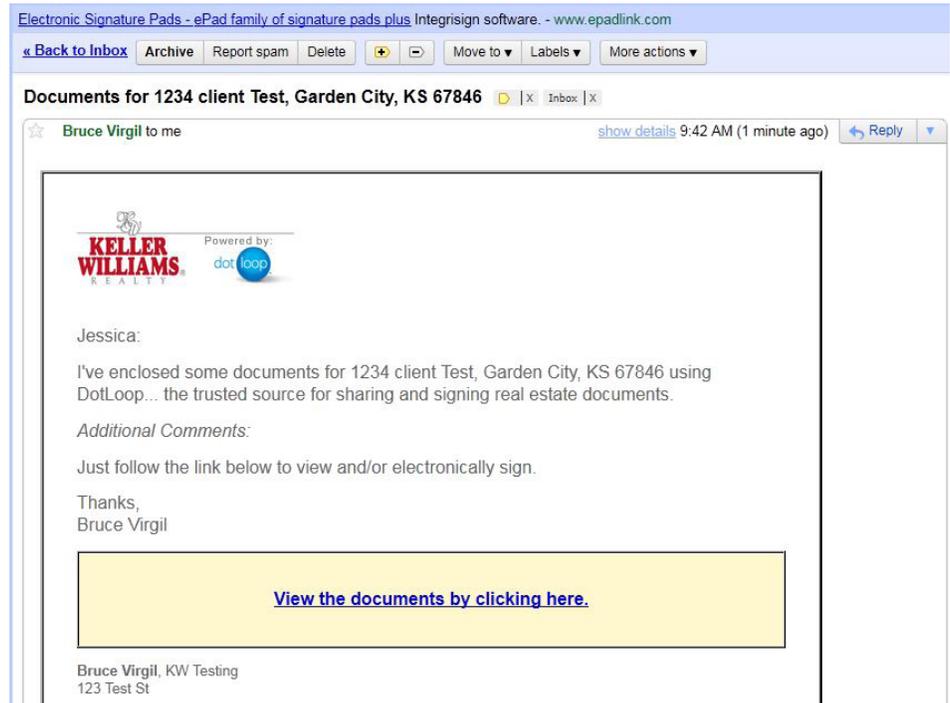
When you work with a Keller Williams agent, you'll have the opportunity to conduct your entire real estate transaction online. DotLoop is a paperless transaction management system. Imagine—no more faxing papers back and forth or driving across town for missed signatures. No more initialed changes to smudged contracts, illegible handwriting, over-faxed contracts or lost documents. With DotLoop, the traditional paper trail is online and all parties to a transaction can collaborate in one space.

The Buyer/Seller Experience

You'll receive an email from your agent letting you know you have documents to review.



Your agent has invited you into a buying or selling “loop.” The transaction documents will NOT be sent to you as an attachment; instead, you are invited view and eSign the documents online.



To view the forms, click Go Now in the email you receive from your agent.

You will arrive at a “Preview” page containing a list of the documents ready for your review and signature. You may choose to print or e-sign the documents. To e-sign, click **Respond**.

dot loop
It's Simple

Home > Login

Offer Preview

1234 client Test, Garden City, KS 67846

Forms

Name	Action	Print
TX - Information About Brokerage Services (TAR 2501, TREC OP-K) - Buying	Action Required	Print

Attachments

Name	Print
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Please finish our short registration process to review and electronically sign your forms.

eSign

Previewing Offer

To preview your offer, click the blue "Print" link. This will open a PDF which will allow you to review the document (The document will open using Adobe Acrobat PDF. You may be required to download the latest version of Adobe Reader).

To confirm the offer, click the "eSign" button to the left. You will be asked to register with DotLoop to input your electronic signature.

Next, you will arrive at the Buyer/Seller Enrollment page, where you will specify an e-signature password and security question.

NOTE: At no time will your agent set up or have access to your password or security question. It is your responsibility to secure and protect your password; do not share you password with anyone.

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Welcome Susan D. Buyer
Dec 9, 2010 2:37:26 PM

Buyer/Seller Enrollment

Welcome Susan D. Buyer

Susan, for security purposes please complete the form below.

Email Address
susandotloop+300@gmail.com

Secret Question
What's your favorite color?

Answer
red

New Password
.....

Confirm New Password
.....

Continue

Once you complete the enrollment process, you'll see a dashboard listing all of your transactions or "loops." This is your Home page in DotLoop.

You will be able to access your transactions online for seven years, or however long your state allows.

Susan's Home - Summary of Your Loops and Notices

Click on an "Loop Name" to view the forms you need to sign.

Loop Name	Offer Type	Attention Required
9999 Training Ave, Austin, TX 78664	Buying	Yes

<< < 1 > >>

Once they select a loop, you will see a brief video tutorial which explains how to review and sign the forms.

Close

1 2 3 4 > >>



ACME REALTORS

X X  I agree to all the terms of this agreement.

X X  The terms below have been updated.

Buyer Signature

 Steve Peele II X 

3/7

OK

[Do not show this again.](#)

As you client review your forms, any lines that require your initials or signature will be highlighted in pink. To sign, just click the pink fields, select your name from the drop-down list, and click **Continue**.

The image shows a screenshot of a real estate contract form. The form contains several sections with checkboxes and input fields. The following items are highlighted in pink:

- Section (2) regarding repairs and treatments.
- Section (3) regarding the date in Paragraph 9.
- Section (4) regarding the amount in Paragraph 12A(1)(b).
- Section (5) regarding the cost of lender required repairs and treatment.
- Section (6) regarding the Option Fee.
- Section (7) regarding the unrestricted right to terminate the contract.
- Section (8) regarding the date for Buyer to give written notice.
- Section (9) regarding Other Modifications.
- The signature line for the Buyer, which includes a drop-down menu and a text input field.

At the bottom of the form, there are buttons for "Print" and "Continue". A blue vertical bar is visible on the right side of the screenshot.

If the form has multiple pages, you will need to review, initial and/or sign each page.

Once you have reached the end of a document, you will lock in your signature by entering your password.

Susan's Contract Signature

Client	Status	Password
Susan D. Buyer		<input type="password"/>

BY ENTERING MY PASSWORD AND CLICKING "eSign" BELOW, I VERIFY THAT I HAVE REVIEWED THE AGREEMENT REFERENCED ABOVE AND AGREE TO ITS TERMS. I AGREE THAT MY ELECTRONIC SIGNATURE SHALL HAVE THE SAME FORCE AND EFFECT AS MY WRITTEN SIGNATURE.

When you complete a form, you will be prompted to review and sign any remaining forms by clicking **eSign**.

Once you have signed all forms in the transaction loop, you will see the final Confirmation screen. Your agent will immediately be notified that you have signed the forms.