eEdge

Co-Op Agent Guide

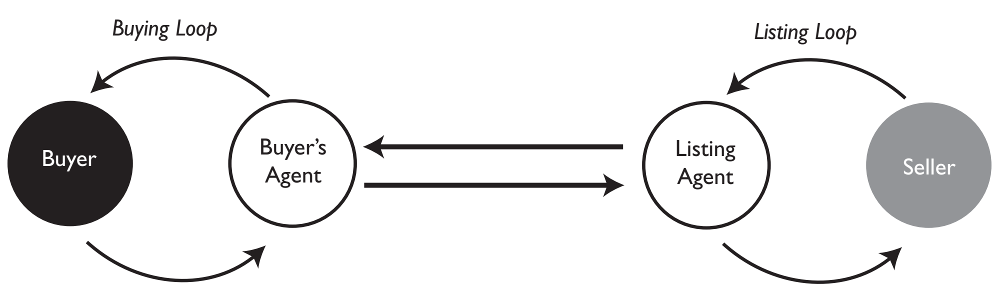
Introduction

eEdge myTransactions is a revolutionary paperless transaction management system that's guaranteed to make you more efficient. Imagine—no more faxing papers back and forth, not always having to meet clients in person, and not having to drive across town for missed signatures or missing forms. With myTransactions, the traditional paper trail is online and all parties to a transaction can collaborate in one space.

When you act as a co-op agent with a Keller Williams agent on a deal, you will receive free access to myTransactions for that particular deal.

The myTransactions system, which is powered by DotLoop, also has enhanced security—so, no more initialed changes to smudged contracts, illegible handwriting, over-faxed contracts or lost documents. Now, every change can be tracked and time-stamped, creating one single seamless document. Collaborating within the Dot Loop system makes the revision process simple and easy

The cores of the myTransactions system and integrated e-signature capability run on the concept of "loops." A loop is simply an online transaction folder. The agent who creates the loop invites their client and the co-op agent to collaborate in the loop, as shown below:



Here's how it works.

1. You receive an email from a Keller Williams agent, inviting you to negotiate online.
2. Click the invitation link to view the offer, register with DotLoop, and access the transaction forms.
3. Review the terms of the forms and submit to your client.

4. Your client will receive an email containing a link to the forms in the loop.

If your client accepts and signs…	If your client asks for changes…
Submit it to the Keller Williams agent.	Make the changes, which will be highlighted in yellow. This also removes the other client's signature from the form. Submit the revised offer to the Keller Williams agent.

5. The Keller Williams agent will review the changes and submit to their client for review.

If your client accepts and signs…	If your client asks for changes…
The offer document is locked. The Keller Williams agent will make the changes, which will be highlighted in yellow. This also removes your client's signature from the form.	The offer document is locked. The Keller Williams agent will make the changes, which will be highlighted in yellow. This also removes your client's signature from the form. The revised offer will be submitted back to you.

6. This continues until all parties agree.

Throughout the negotiation process, there is one clean document, showing the most recent changes. The document contains a full revision history. The current state of a document can be viewed in real time, at any time, from any location with Internet access.

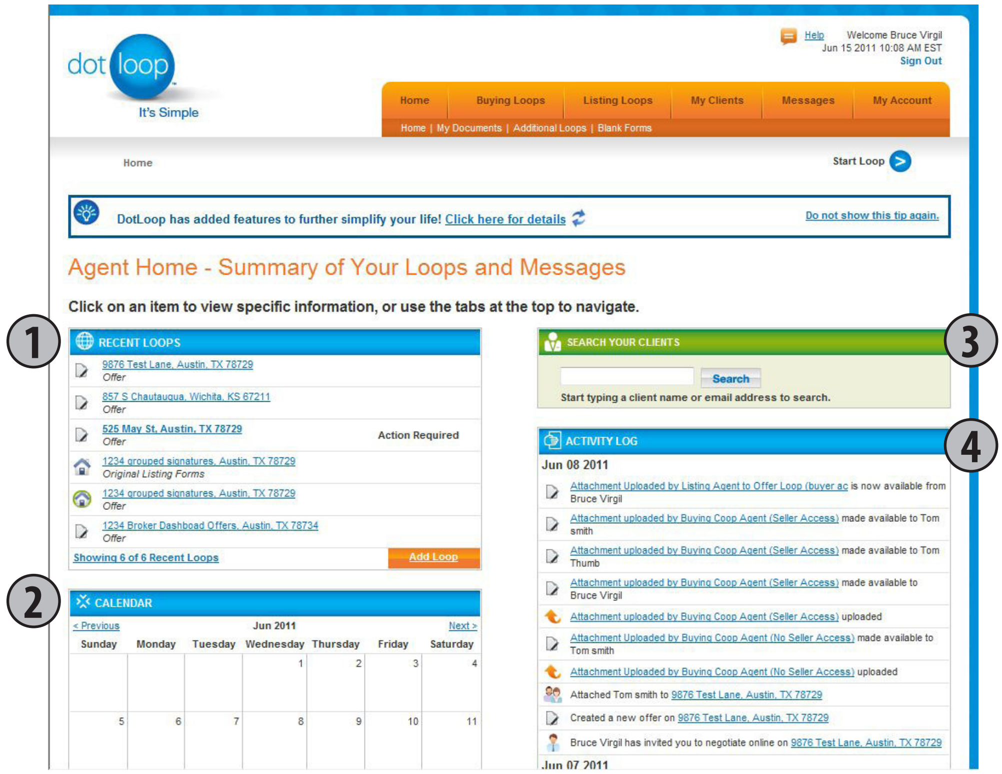
The Difference

Traditionally, e-signatures have been facilitated by emailing PDF attachments or scanning and emailing faxed documents. During negotiations, these documents may be printed, written on, rescanned and sent several times. This often results in messy, illegible documents and having to manage multiple copies of a single document. While myTransactions does accommodate the traditional PDF attachment method, the cores of the system and its integrated electronic signatures operate on the concept of "loops." The only item sent in myTransactions is an invitation to collaborate online, in real time. Collaboration involves live, interactive forms that are stored in an online buying or listing loop.

Agent Home Screen

The myTransactions Dashboard is known as "Agent Home." Agent Home is a snapshot of your virtual office—it summarizes all of your loops and messages. Again, a "loop" is a transaction, or your real estate file for a property. It will contain all the agents, clients, and forms associated with a transaction. Buying loops are therefore offers, and listing loops are listings.

The Agent Home screen is split into four sections, as shown here:



1. Recent Loops

Lists the most recent Loops. You can go to the specific Loop type at the top for a comprehensive list of all the Loops.

2. Calendar

Reflects tasks and reminders set up.

3. Search Your Clients

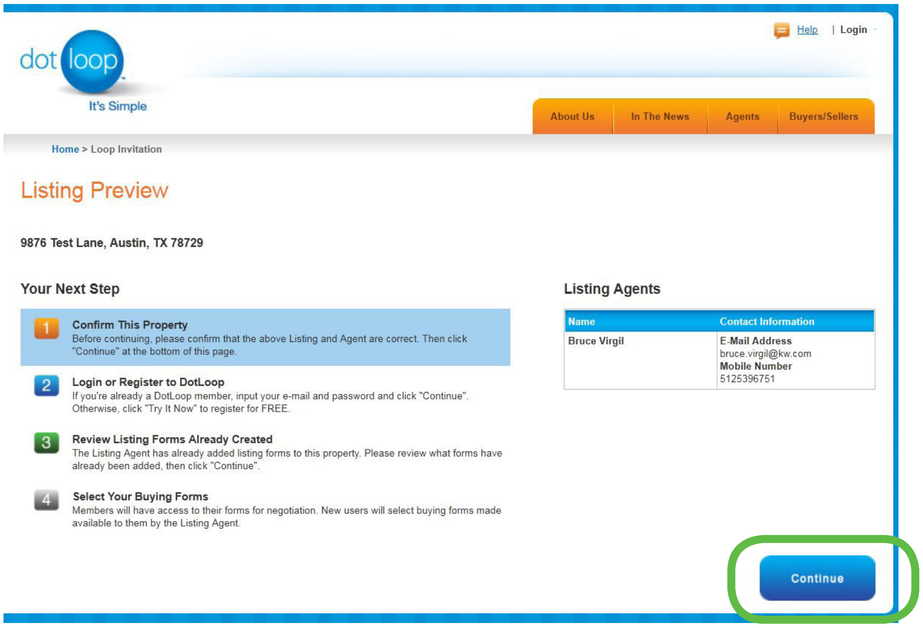
Allows you to quickly access client information.

4. Activity Log

Displays all recent activity.

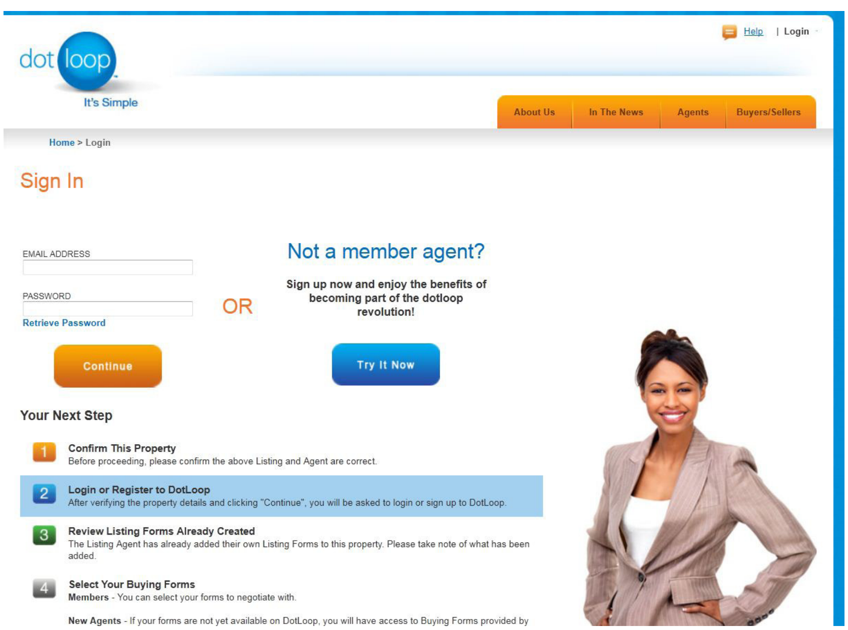
Creating an Offer

Registration/Login



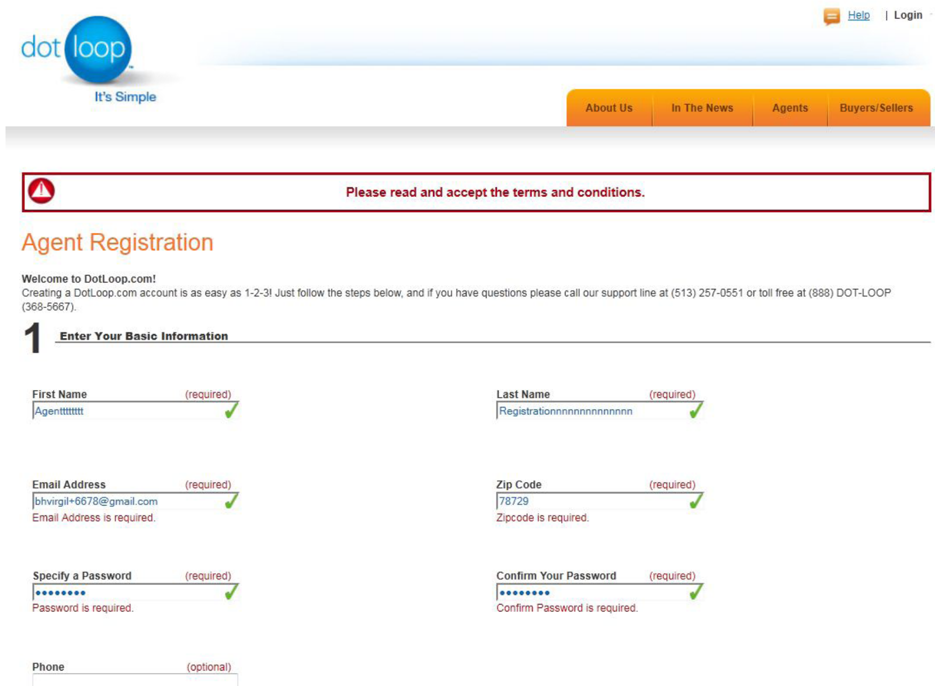
To register, follow the link given to you by the listing agent. You will arrive at the Listing Preview screen. Here, you'll confirm the address and listing agent of the property for which you are making the offer.

Click Continue.

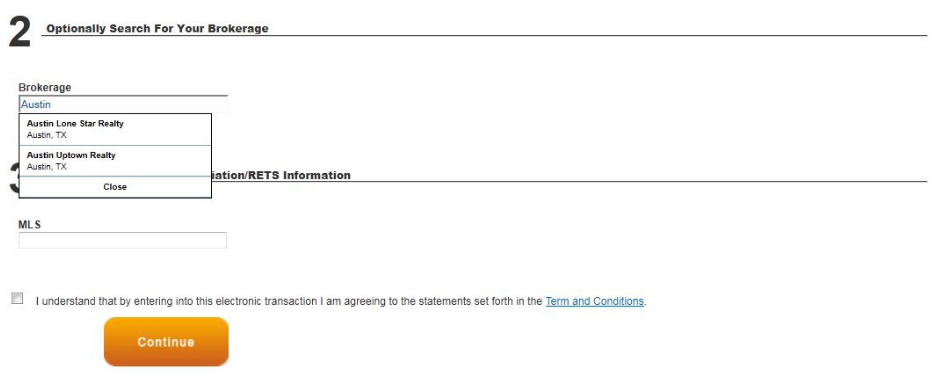


You'll arrive at the Sign In page.

- If this is your first time using DotLoop, click Try It Now to set up your login and eSignature password.
- If you are a returning user, enter your email address and password.



If you clicked Try It Now you will arrive at the Agent Registration screen. Complete all required fields and click Continue.

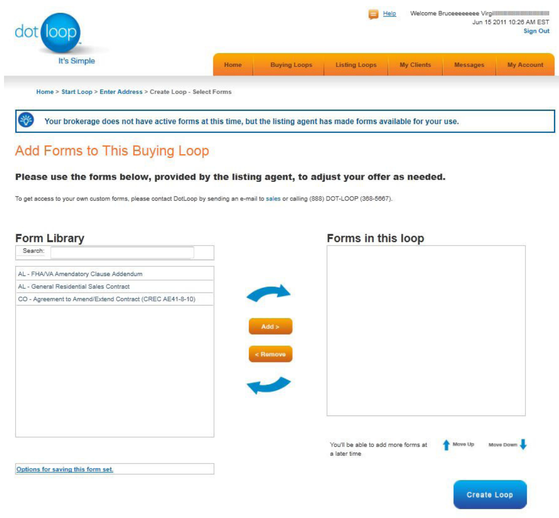


Select your brokerage from the list, correcting the zip code, if needed. If your brokerage is not listed, click Add New.

Forms

You'll see two columns of forms on the screen that appears.

- On the left is the Form Library, which contains all forms that are accessible to you. Roll your mouse over any form name to see a thumbnail image.
- On the right are Forms in this Loop—the forms included in this transaction



Once you have all the forms you need, click Save & Continue.

NOTE: *You can always add and remove forms after the Loop is created.*

TIP OF THE DAY: If you ever feel lost in myTransactions and you're not sure what your next step is, just scroll down and look at the button in the bottom right-hand corner. Over 90% of the time there will be a button there to tell you what your next action is.

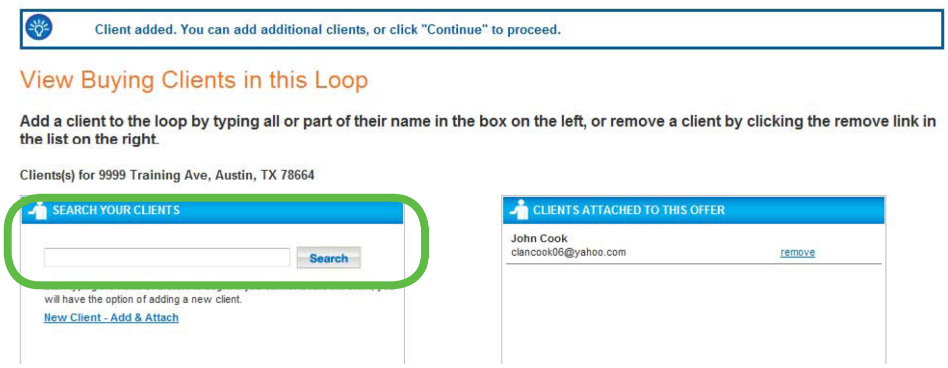
Reality Check

The listing agent will not be aware of your offer or any of the offer forms until you submit them to the agent. Once your client has signed the offer, you will be prompted to submit it to the listing agent.

Adding Clients

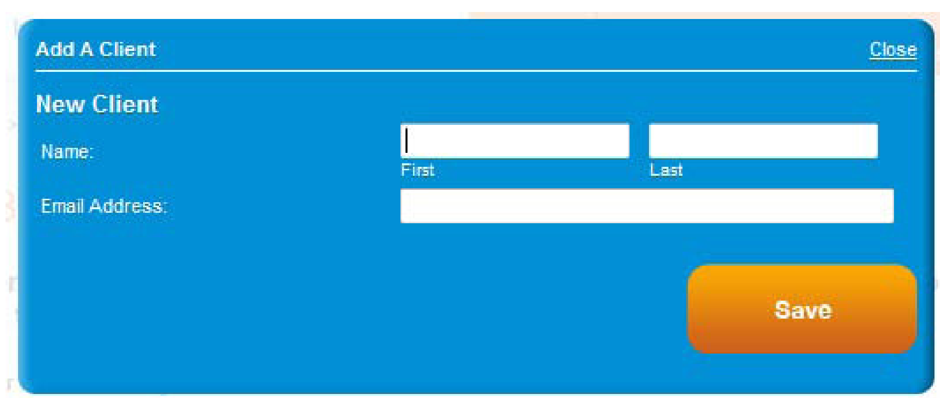
Next, you will add your client(s) to the loop.

Each client must be added separately, and each must have a unique email address. For example, if two people are cosigning, each person must use their own individual email address. These emails will be used to confirm each client's electronic signature, adding an additional critical layer of compliance.

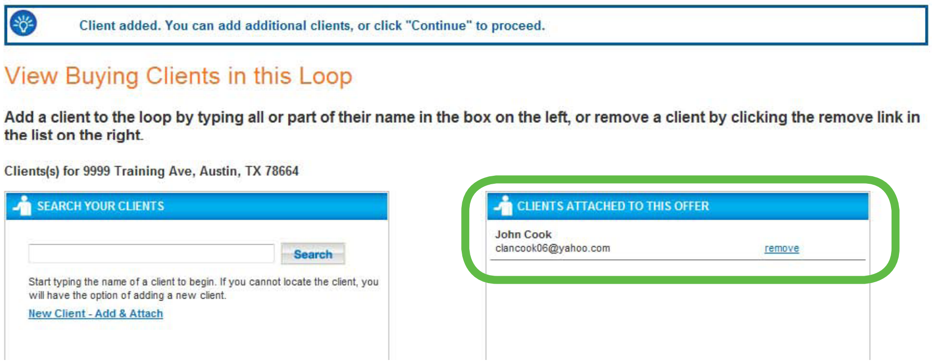


Enter part or all of the client's name and click Search to see if they are already registered with DotLoop. If they are registered with DotLoop, select their name from the list.

If they do not show up in the search results, click New Client > Add & Attach.



You'll be prompted to enter the client's name and email address.



As each client is added, their name will appear in the box to the right—Clients Attached to This Offer.

When you have finished adding your clients, click the Save and Continue button in the bottom right corner.

Reality Check

Some clients may say they only use one email account. It's important that each client needing to sign a document has their own email address. Each electronic signature is confirmed with the use of an email login and unique password the client creates. This adds an additional layer of compliance.

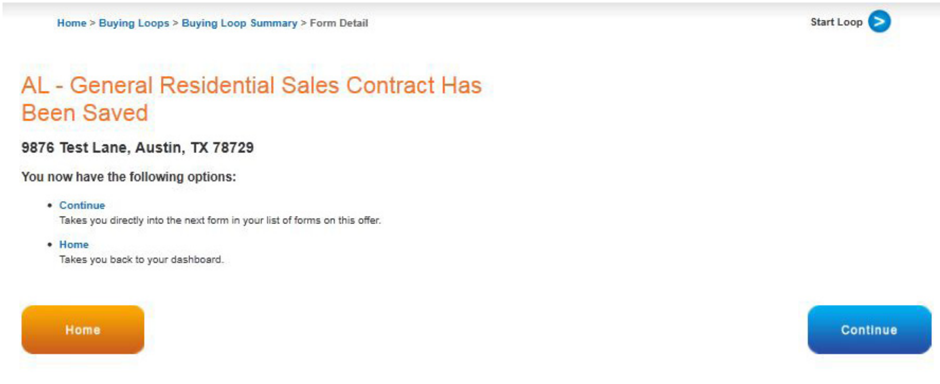
Completing Forms

As you are reviewing forms, you'll see that each field s interactive. This allows for online collaboration, compliance tracking of changes and final documents as clean as the original.

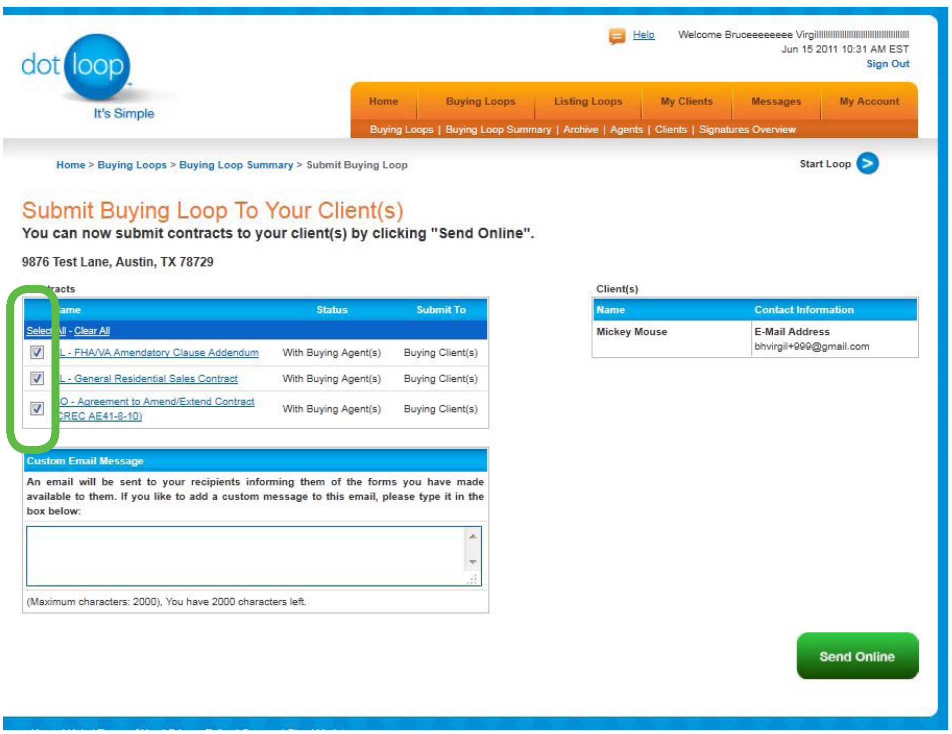
NOTE: *You must review and save each page in order for the client to be able to sign.*

Fields which contain a black X are assigned to specific parties for their electronic signature. Roll over any field with your mouse to see which party is required to sign there—the buyer, buyer's agent, seller, or listing agent.

A confirmation screen will appear once a form is completed. Click Continue to move to the next form. Click Buying Forms to return to the Loop.



Once you have completed the forms, you can select the forms to send to your clients. Click the box next to each form that needs to be sent to your client.



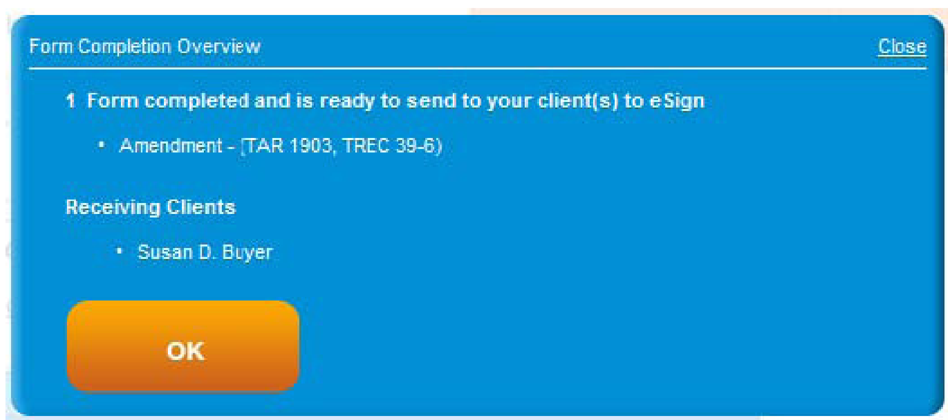
Click Send, which will present you with three options for sending:

1. **Send Online**—submit forms using myTransactions—the loop sharing method.
2. **Send Fax**—to send the selected forms via fax
3. **Send PDF**—to email the selected forms as PDF attachments

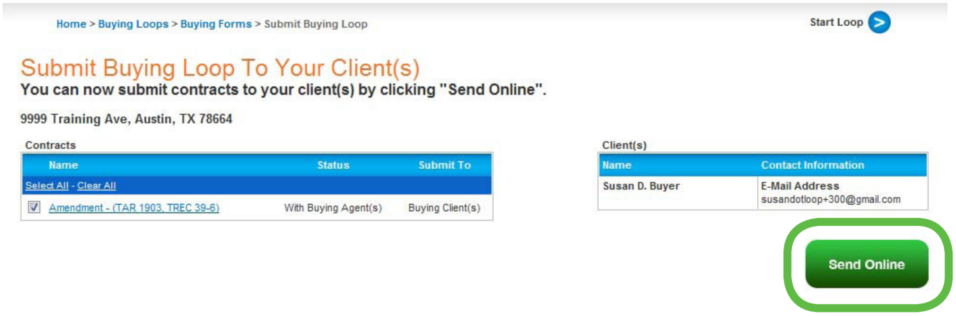
Click Send Online.

The Form Completion Overview will list the forms ready to be sent to your client.

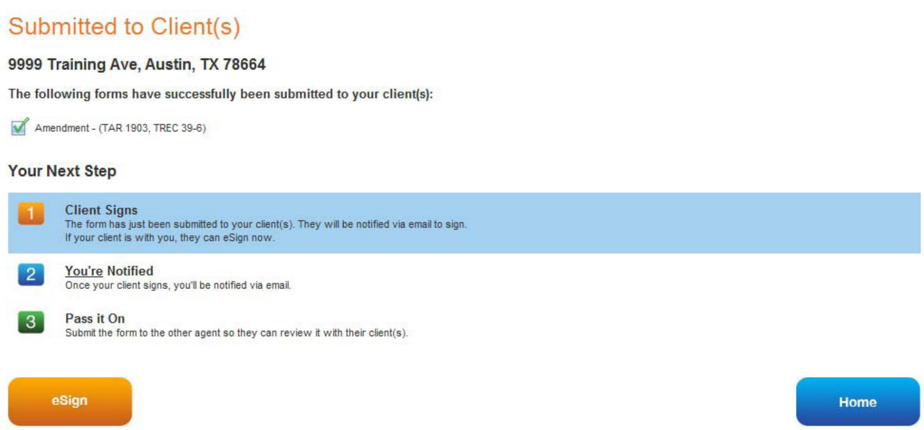
Click OK.



Click Send Online.



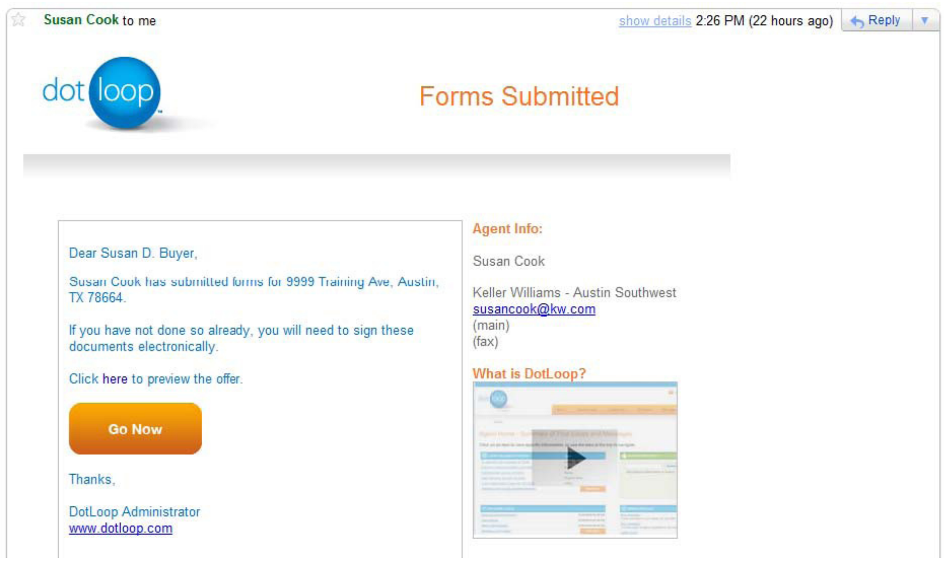
After sending the forms, you receive a confirmation screen that outlines the next steps.



Your Clients Experience

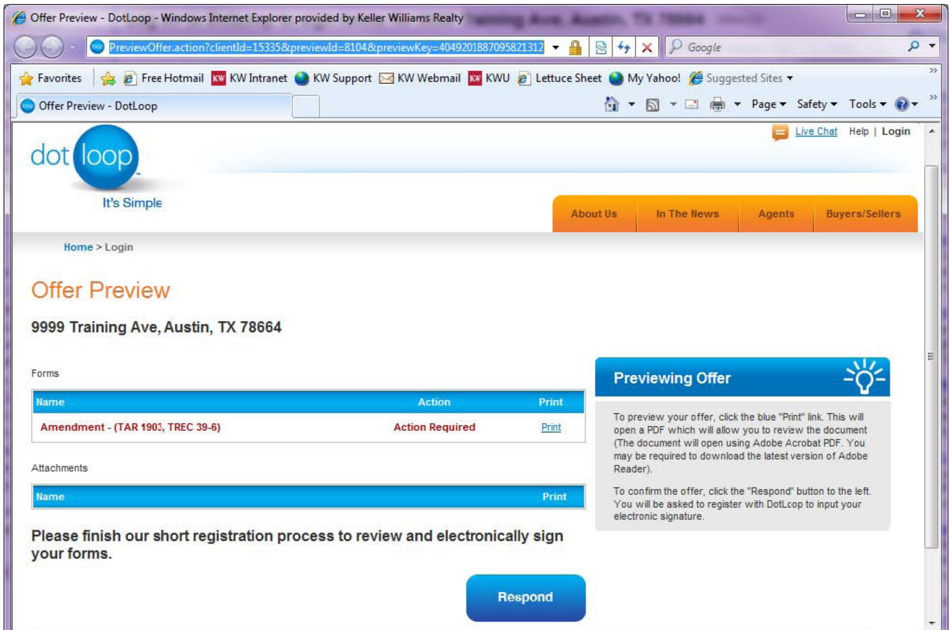
When you submit forms to your client, they'll receive an email letting them know that they have documents to review. The email is branded with your information, and if your client replies to this email, they are replying directly to you—not a random "do-not-reply" email address.

Again, when you invite a client into a loop using myTransactions, the document forms are NOT sent to your client as an attachment. Instead, you are inviting your client to view the documents that you have shared with them online. To view the forms, they will click the link in the email.



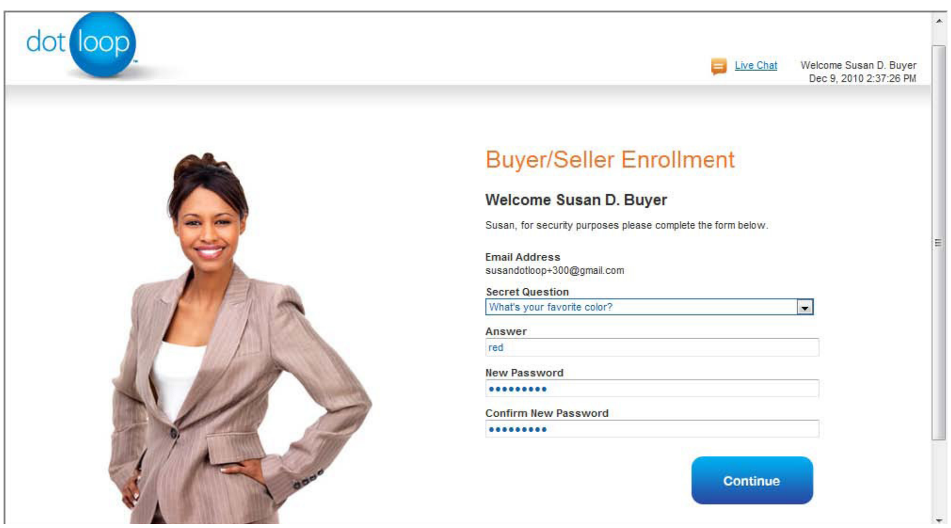
To view the forms, your client will click Go Now in the email.

After clicking this link, your client will arrive at a "Preview" page where they'll see a list of the documents they need to review and sign. They may choose to print or e-sign the documents. To e-sign, you client will click Respond.



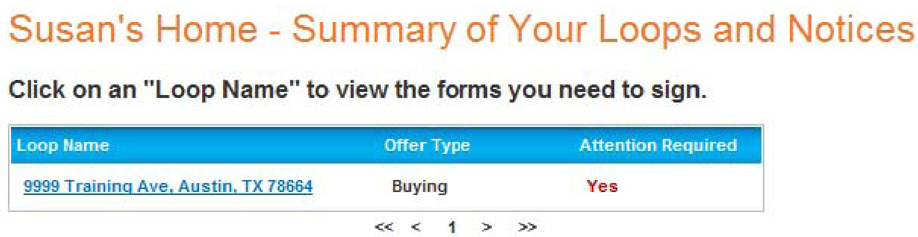
Next, your client will arrive at the Buyer/Seller Enrollment page, where they will specify their e-signature password and security question.

NOTE: *At no time will you set up or have access to a client's password or security question.*



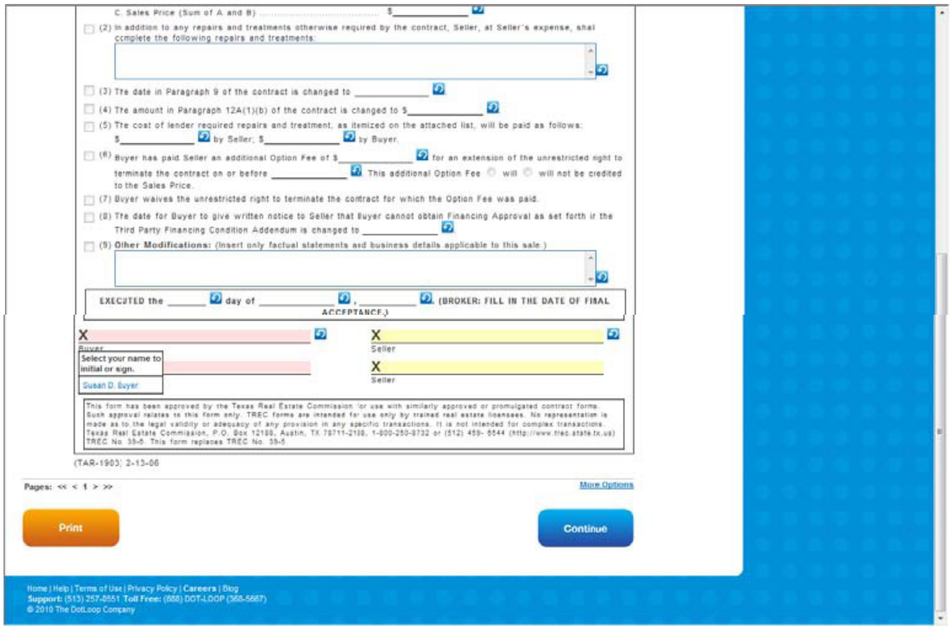
Once your client completes the enrollment process, they'll see a dashboard listing all of their transactions or "loops." This is your client's Home page in DotLoop.

Your client will be able to access their transactions online for seven years, or however long your state allows. And throughout the transaction, you can attach additional documents to the loop—such as a survey or settlement statement—and give access to your client.



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

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



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

Once your client has reached the end of a document, they will need to lock in their signature by entering their password.

When your client completes a form, they will be prompted to review and sign any remaining forms. Once your client signs all forms in their loop, they will see the final Confirmation screen which lets them know that they are done.

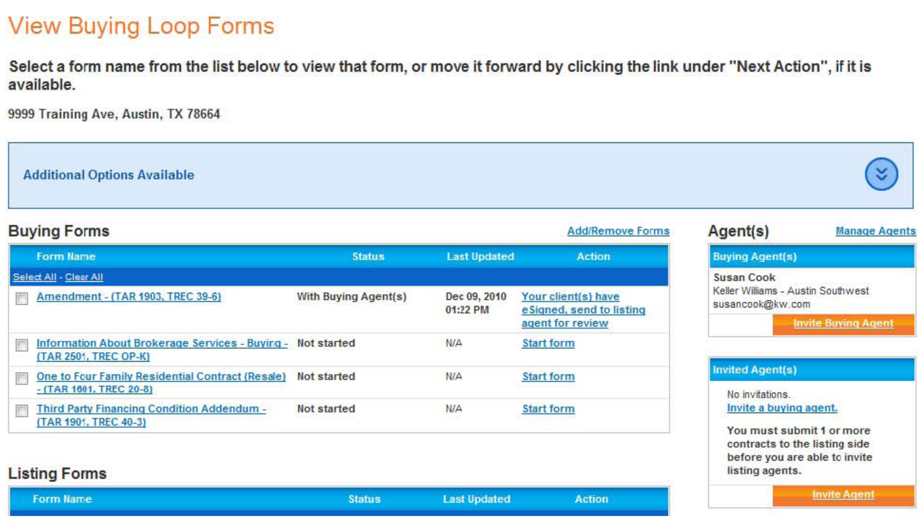
Submitting the Offer

As soon as your client finishes signing all of the required forms, you'll receive a notification. You'll get this notification in your email and/or by text message, depending on how you've set up your account preferences.

After the forms are eSigned and returned to you, you may then send those forms to the Keller Williams agent.

After logging in, select the appropriate loop from your recent loops section.

Select the forms you wish to send and click Send in the bottom right corner.



Choose a method of sending the forms from the three options listed.