



# **Co-Op Agent Guide**

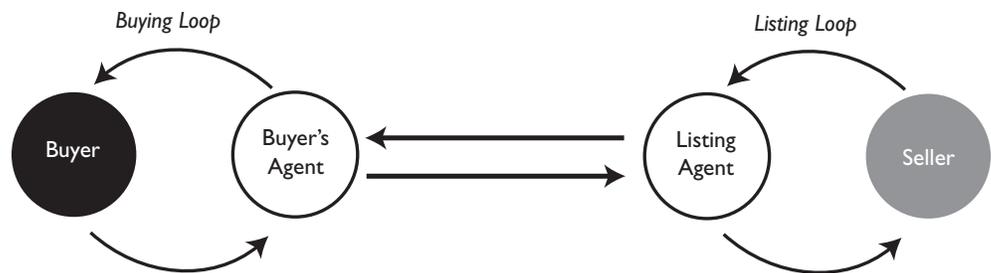
# Introduction

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.

- 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.	<p>Make the changes, which will be highlighted in yellow. This also removes the other client's signature from the form.</p> <p>Submit the revised offer to the Keller Williams agent.</p>

- 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.	<p>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.</p> <p>The revised offer will be submitted back to you.</p>

- 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:

The screenshot shows the Agent Home interface. At the top, there's a navigation bar with tabs for Home, Buying Loops, Listing Loops, My Clients, Messages, and My Account. Below this is a banner for recent updates. The main content area is titled "Agent Home - Summary of Your Loops and Messages" and includes instructions to click on items or use top tabs. The four numbered callouts point to: 1. Recent Loops (a list of transactions with details like address and type), 2. Calendar (a monthly view for June 2011), 3. Search Your Clients (a search bar for client names or emails), and 4. Activity Log (a list of recent system events and actions).

## 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

dot loop  
It's Simple

Home > Loop Invitation

### Listing Preview

9876 Test Lane, Austin, TX 78729

#### Your Next Step

- 1 Confirm This Property**  
Before continuing, please confirm that the above Listing and Agent are correct. Then click "Continue" at the bottom of this page.
- 2 Login or Register to DotLoop**  
If you're already a DotLoop member, input your e-mail and password and click "Continue". Otherwise, click "Try It Now" to register for FREE.
- 3 Review Listing Forms Already Created**  
The Listing Agent has already added listing forms to this property. Please review what forms have already been added, then click "Continue".
- 4 Select Your Buying Forms**  
Members will have access to their forms for negotiation. New users will select buying forms made available to them by the Listing Agent.

#### Listing Agents

Name	Contact Information
Bruce Virgil	E-Mail Address bruce.virgil@kw.com Mobile Number 5125396751

Continue

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**.

dot loop  
It's Simple

Home > Login

### Sign In

EMAIL ADDRESS

PASSWORD

Retrieve Password

Continue

OR

**Not a member agent?**  
Sign up now and enjoy the benefits of becoming part of the dotloop revolution!

Try It Now

#### Your Next Step

- 1 Confirm This Property**  
Before proceeding, please confirm the above Listing and Agent are correct.
- 2 Login or Register to DotLoop**  
After verifying the property details and clicking "Continue", you will be asked to login or sign up to DotLoop.
- 3 Review Listing Forms Already Created**  
The Listing Agent has already added their own Listing Forms to this property. Please take note of what has been added.
- 4 Select Your Buying Forms**  
Members - You can select your forms to negotiate with.  
New Agents - If your forms are not yet available on DotLoop, you will have access to Buying Forms provided by

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.

Please read and accept the terms and conditions.

## Agent Registration

Welcome to DotLoop.com!  
Creating a DotLoop.com account is as easy as 1-2-3! Just follow the steps below, and if you have questions please call our support line at (513) 257-0551 or toll free at (888) DOT-LOOP (368-5667).

### 1 Enter Your Basic Information

First Name (required) Agentttttttt ✓	Last Name (required) Registrationnnnnnnnnnnnn ✓
Email Address (required) bhvirgil+6678@gmail.com ✓ Email Address is required.	Zip Code (required) 78729 ✓ Zipcode is required.
Specify a Password (required) ***** ✓ Password is required.	Confirm Your Password (required) ***** ✓ Confirm Password is required.
Phone (optional) _____	

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

### 2 Optionally Search For Your Brokerage

Brokerage  
Austin  
Austin Lone Star Realty  
Austin, TX  
Austin Uptown Realty  
Austin, TX  
Close

MLS  
\_\_\_\_\_

I understand that by entering into this electronic transaction I am agreeing to the statements set forth in the [Term and Conditions](#)

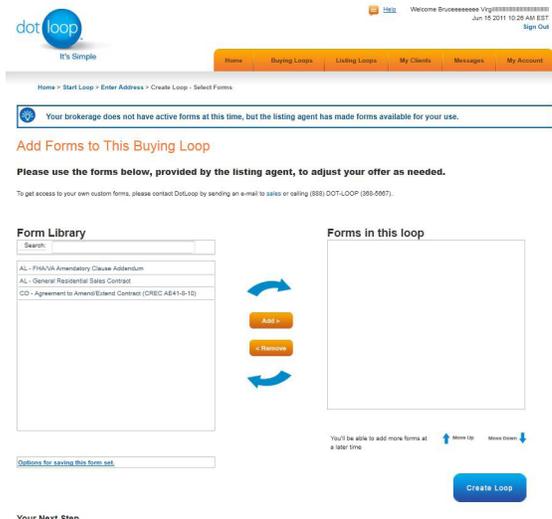
**Continue**

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.



## View Buying Clients in this Loop

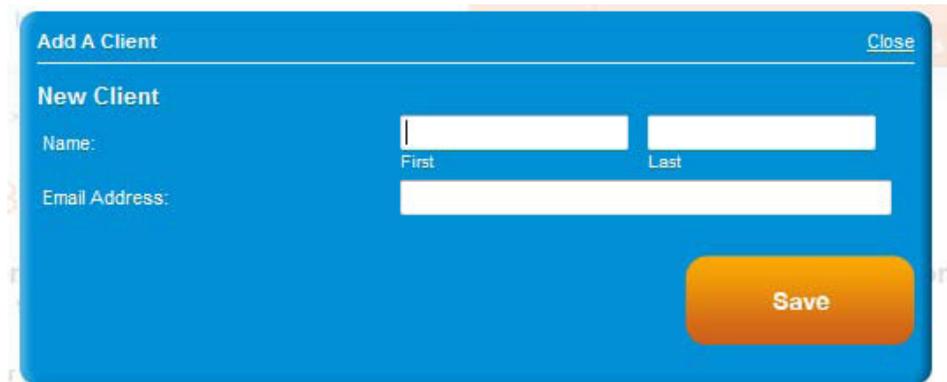
Add a client to the loop by typing all or part of their name in the box on the left, or remove a client by clicking the remove link in the list on the right.

Clients(s) for 9999 Training Ave, Austin, TX 78664



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.

Client added. You can add additional clients, or click "Continue" to proceed.

### View Buying Clients in this Loop

Add a client to the loop by typing all or part of their name in the box on the left, or remove a client by clicking the remove link in the list on the right.

Clients(s) for 9999 Training Ave, Austin, TX 78664

**SEARCH YOUR CLIENTS**

Start typing the name of a client to begin. If you cannot locate the client, you will have the option of adding a new client.

[New Client - Add & Attach](#)

**CLIENTS ATTACHED TO THIS OFFER**

John Cook clancook06@yahoo.com	<a href="#">REMOVE</a>
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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 is 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.*

The screenshot shows the dot loop website interface. At the top, there is a navigation bar with links for Home, Buying Loops, Listing Loops, My Clients, Messages, and My Account. Below this is a breadcrumb trail: Home > Buying Loops > Buying Loop Summary > Form Detail. The main heading is "AL - General Residential Sales Contract" with a sub-instruction: "Fill out this contract. Click 'Save and Continue' to advance to next page." Below the heading is the address "9876 Test Lane, Austin, TX 78729".

A blue-bordered box contains the following text:
 

- Signature(s) or initials are required on this page. Please look for this symbol **X** and select your name to initial or sign. Your signatures will appear once you input your password after reviewing the form.
- X** Click to select which party will sign or initial the field.
- X** Once selected, you will see this symbol that indicates the field needs to be signed by the party selected.
- ✓** You will see this check after the initials or signatures have been password verified by the selected party.

 A link "Do not show this again." is at the bottom right of the box.

Below the box is a legal disclaimer: "THIS IS A LEGALLY BINDING CONTRACT. IF YOU DO NOT UNDERSTAND THE LEGAL EFFECT OF ANY PART OF THIS CONTRACT, SEEK LEGAL ADVICE BEFORE SIGNING." This is followed by signature lines for "Witness to Buyer's Signature" (two lines) and "Witness to Seller's Signature" (one line). To the right of these are four signature fields, each with a "Buyer" or "Seller" label and a "(Date)" label. A green box highlights these four signature fields, and an arrow points from a text box on the left to this area.

At the bottom of the form, there is a "Forms in this Loop" section with a "Signature" tab and a "More Options" button. Below this is a navigation bar with a "Save" button, a series of numbered buttons (1-9) with navigation arrows, and a "Save & Complete" button.

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.

Home > Buying Loops > Buying Loop Summary > Form Detail Start Loop >

## AL - General Residential Sales Contract Has Been Saved

9876 Test Lane, Austin, TX 78729

You now have the following options:

- **Continue**  
Takes you directly into the next form in your list of forms on this offer.
- **Home**  
Takes you back to your dashboard.

Home
Continue

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.

[Help](#) | Welcome Bruceeeeeeee Virgil | Jun 15 2011 10:31 AM EST  
[Sign Out](#)

Home
Buying Loops
Listing Loops
My Clients
Messages
My Account

Buying Loops | Buying Loop Summary | Archive | Agents | Clients | Signatures Overview

Home > Buying Loops > Buying Loop Summary > Submit Buying Loop
Start Loop >

### Submit Buying Loop To Your Client(s)

You can now submit contracts to your client(s) by clicking "Send Online".

9876 Test Lane, Austin, TX 78729

Contracts	Name	Status	Submit To
<input checked="" type="checkbox"/>	<a href="#">L - FHA/VA Amendatory Clause Addendum</a>	With Buying Agent(s)	Buying Client(s)
<input checked="" type="checkbox"/>	<a href="#">L - General Residential Sales Contract</a>	With Buying Agent(s)	Buying Client(s)
<input checked="" type="checkbox"/>	<a href="#">O - Agreement to Amend/Extend Contract (REC AE41-8-10)</a>	With Buying Agent(s)	Buying Client(s)

Client(s)	
Name	Contact Information
Mickey Mouse	E-Mail Address bhvirgil+999@gmail.com

**Custom Email Message**

An email will be sent to your recipients informing them of the forms you have made available to them. If you like to add a custom message to this email, please type it in the box below:

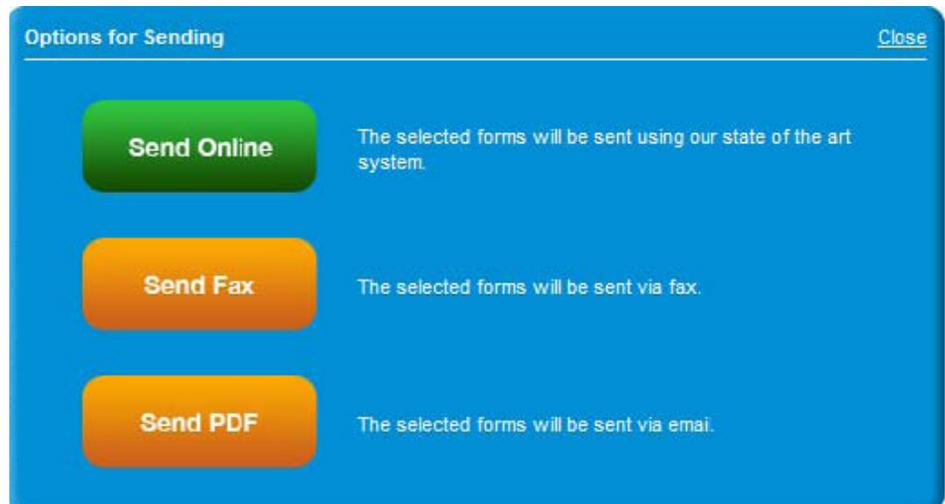
(Maximum characters: 2000). You have 2000 characters left.

Send Online

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

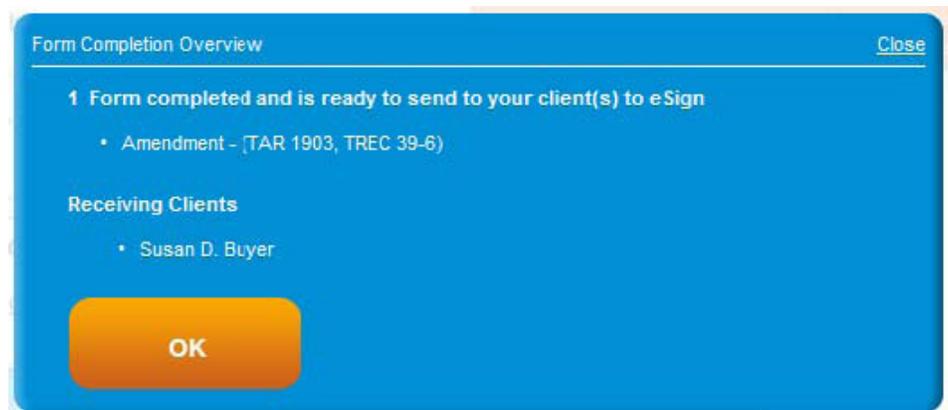
1. **Send Online**—submit forms using myTransactions—the loop sharing method.
2. **Send Fax**—to send the selected forms via fax
3. **Send PDF**—to email the selected forms as PDF attachments

Click **Send Online**.



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

Click **OK**.



Click **Send Online**.



Home > Buying Loops > Buying Forms > Submit Buying Loop Start Loop >

### Submit Buying Loop To Your Client(s)

You can now submit contracts to your client(s) by clicking "Send Online".

9999 Training Ave, Austin, TX 78664

Contracts		
Name	Status	Submit To
<a href="#">Select All</a> - <a href="#">Clear All</a>		
<input checked="" type="checkbox"/> Amendment - (TAR 1903, TREC 39-6)	With Buying Agent(s)	Buying Client(s)

Client(s)	
Name	Contact Information
Susan D. Buyer	E-Mail Address susandotloop+300@gmail.com

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

### Submitted to Client(s)

9999 Training Ave, Austin, TX 78664

The following forms have successfully been submitted to your client(s):

Amendment - (TAR 1903, TREC 39-6)

#### Your Next Step

- 1 Client Signs**  
The form has just been submitted to your client(s). They will be notified via email to sign. If your client is with you, they can eSign now.
- 2 You're Notified**  
Once your client signs, you'll be notified via email.
- 3 Pass it On**  
Submit the form to the other agent so they can review it with their client(s).

[eSign](#)

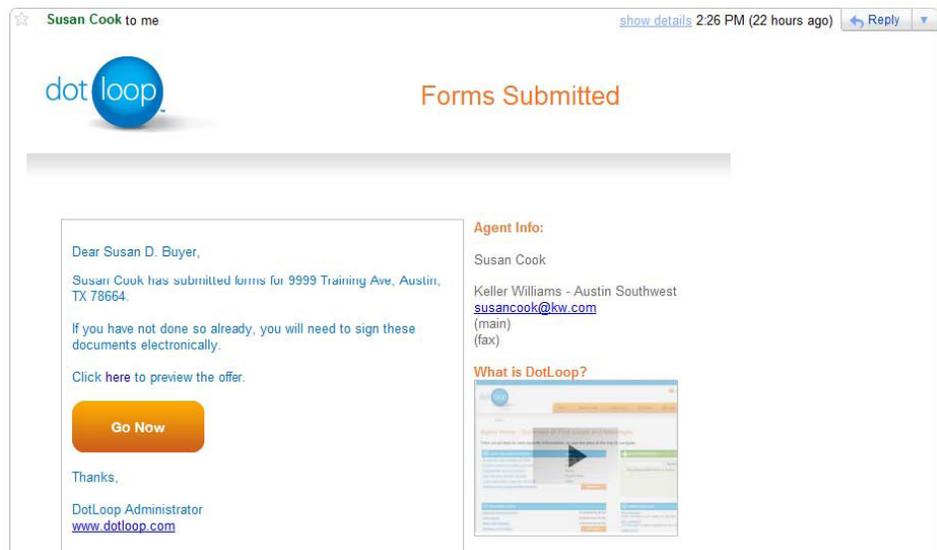
[Home](#)

# 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.

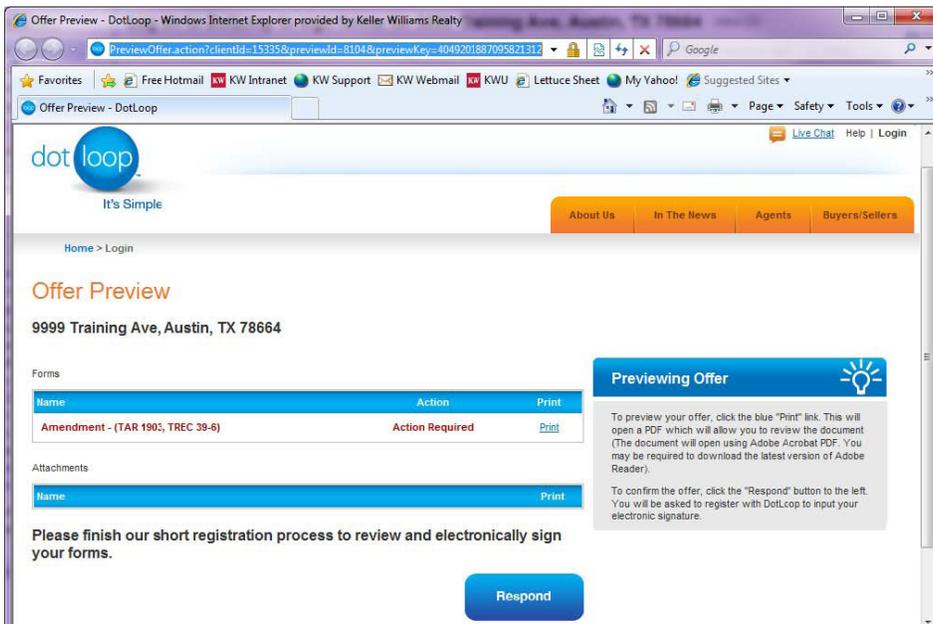


Again, when you invite a client into a loop using myTransactions, the document forms are NOT sent to your client as an attachment. Instead, you are inviting your client to view the documents that you have shared with them online. To view the forms, they will click the link in the email.



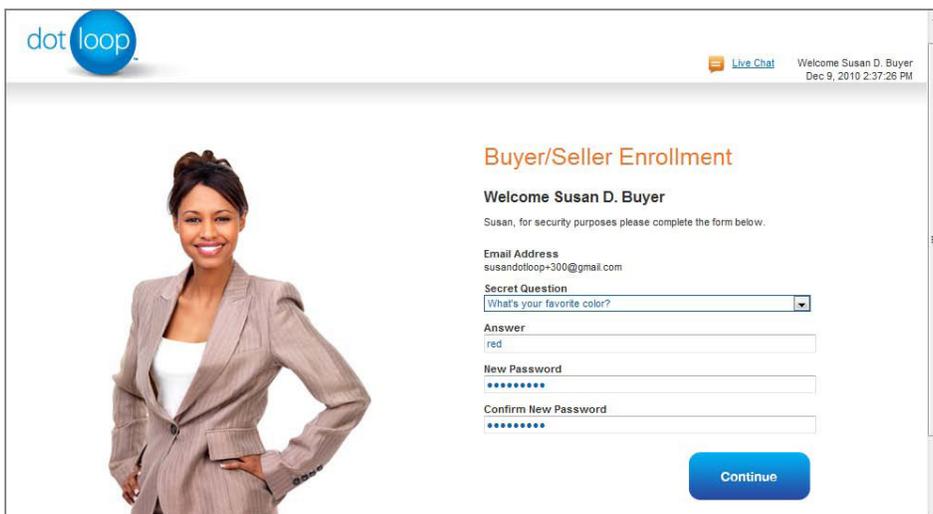
To view the forms, your client will click **Go Now** in the email.

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.

## 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
<a href="#">9999 Training Ave, Austin, TX 78664</a>	Buying	Yes

<< < 1 > >>

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

Setting Up Forms With Multiple Signatures
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  

⏪ ⏩ 3/7 ⏪ ⏩

OK

[Do not show this again.](#)

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**.

The screenshot shows a real estate contract form with several sections. The 'C. Sales Price (Sum of A and B)' section is at the top. Below it are several numbered checkboxes (2) through (9) with associated text and input fields. The signature section at the bottom has two columns of fields. The first column is for the Buyer, and the second is for the Seller. The Buyer's name 'Susan D. Buyer' is selected in a dropdown menu. The 'Continue' button is highlighted in blue.

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.

### 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 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.

## View Buying Loop Forms

Select a form name from the list below to view that form, or move it forward by clicking the link under "Next Action", if it is available.

9999 Training Ave, Austin, TX 78664

Additional Options Available

### Buying Forms Add/Remove Forms

Form Name	Status	Last Updated	Action
Select All - Clear All			
<input type="checkbox"/> <a href="#">Amendment - (TAR 1903, TREC 39-6)</a>	With Buying Agent(s)	Dec 09, 2010 01:22 PM	<a href="#">Your client(s) have eSigned, send to listing agent for review</a>
<input type="checkbox"/> <a href="#">Information About Brokerage Services - Buying - (TAR 2501, TREC OP-K)</a>	Not started	N/A	<a href="#">Start form</a>
<input type="checkbox"/> <a href="#">One to Four Family Residential Contract (Resale) - (TAR 1001, TREC 29-5)</a>	Not started	N/A	<a href="#">Start form</a>
<input type="checkbox"/> <a href="#">Third Party Financing Condition Addendum - (TAR 1907, TREC 40-3)</a>	Not started	N/A	<a href="#">Start form</a>

### Agent(s) Manage Agents

**Buying Agent(s)**  
 Susan Cook  
 Keller Williams - Austin Southwest  
 susancook@kw.com  
Invite Buying Agent

**Invited Agent(s)**  
 No invitations.  
[Invite a buying agent.](#)  
 You must submit 1 or more contracts to the listing side before you are able to invite listing agents.  
Invite Agent

### Listing Forms

Form Name	Status	Last Updated	Action

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

Options for Sending [Close](#)

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**Send Online**      The selected forms will be sent using our state of the art system.

**Send Fax**      The selected forms will be sent via fax.

**Send PDF**      The selected forms will be sent via email.