# **DOTLOOP 101 – Creating a Loop**

#### Logon To MyKW.KW.COM

eEdge Control Panel

MyTransactions - click plus icon - select "Transaction Home"



## **Dotloop MyTransaction Home Page**

Select "Create a Loop"

powered by dotloop	<u> </u>	au a
* New to dotloop? Watch our training videos!	Filter Activity Log Sort By: Last updated V	(
Loops		
Loops are online workplaces. Use loops for home sales, apartment renta	als, expense reports or anything.	
	Q Create a lo	ор
Test Loop	Q Create a lo 07/26/24	_

#### Create a loop

- Name the loop: 1234 Houston Drive\_Last Name
- Select "Create Loop"



\*Sample Contract- Please refer to your sample contract for the corresponding information in the next sections \*

## You've created a loop...What now?

# <u>1234 Houston Place\_Last Name</u>

## Documents

• Click "Select from your templates"



#### **Documents**

- Select "Listing Template"
- Select "Select all"
- Select "Add Documents"



## 1234 Houston Drive\_Last Name

• Select "Edit Details"



-Within Details you can edit Contract Information such as contract price, status, title, mortgage, sales price, other agent information and brokerage, photo, etc. -

- At this moment Green sheets are still being submitted through your green sheet tab under the transactions, not from Loop details. See photo below on where to find green sheets-



#### The "Details"

- Upload Photo
  - a. Select photo from laptop
- Loop Status
  - a. Active
- Transaction Type
  - a. Sale-Purchase
- People
  - a. Add your clients
    - i. Jane Doe



- ii. Pair up with a partner, and enter their email address for this exercise. We will be sending contract documents to one another as if you were the "client". This way you will see what your clients see.
- Contract Details
  - a. Fill in corresponding details such as address.
    - i. \*If this loop had a contract submitted, you would be able to add additional information under details. \*
- Click "Save"
- Click "Back to Loop"

\*Note: We will build to this loop next class, so do not delete loop. \*

## Adding Details to Loop Documents

• Select "Residential Listing Agreement"

	Share
	Add Document
Not Shared	<b>P</b> 0 <b>R</b> 1
Not Shared	0 8 1
Not Shared	<b>P</b> 0 <b>R</b> 1
Not Shared	<b>(P</b> ) 0 <b>(R</b> ) 1
Not Shared	0 8 1
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Not Shared	<b>P</b> 0 <b>R</b> 1
Not Shared	<b>P</b> 0 <b>R</b> 1
	Not Shared Not Shared Not Shared Not Shared Not Shared Not Shared Not Shared

## Assign Signatures?

- Select Person "Jane Doe"
- Select "Assign"
- Fill in corresponding Information from the contract. Keep your broker associate information as your own.

\*example on following page\*

	Assign sign	atures?		×
	To save time, as	el <del>on people to the r</del> e	oles listed below	
	Seller 1	Jane Doe	Jane9864@gmail.com	
	Seller 2		Select Person	٥
USE C	Listing agent		Select Person	¢D.
The			Skip Assig	

\*Because you have "assigned" your seller to the contract your initial and signature field for your clients will automatically populate in their signature field.\*

#### How do I, the agent, sign?

- Select "Listing agent initial field"
- Select "Assigned to"
- Select "Your Name" (Listing Agent)
- Select "Sign Now"
- Select "Confirm and Sign"
- Select "Save & Share"
- Repeat these steps for T-47, Sellers Disclosure and IABS

< Back to loo	op - Fave	φ	More 🗸	Save & Share
Assigned to ante- Sarah Boro North	to Listing Agent(s)	Interpretation of the second secon	nd air-conditionir andeliers, water ery, landscaping,	ng units, softener , outdoor
Anyone No one Role: Listin Add Persoi		ing described related accessories, if any: window air ns and rods, blinds, window shades, draperies and r l, swimming pool equipment and maintenance acces (i) satellite dish systems, (ii) garage doors, (iii) ent sories.	rods, door keys, sories, artificial	mailbox fireplace
	removed prior to deliver			must be age 1 of 9
	carpeting, mirrors, ceiling fans	More  More  v Atuc tans, mail boxes, television antennas and satellite dist for the table of the satellite		
C.	security and fire detection equipystem, kitchen equipment, ga cooking equipment, and all of property. <u>Accessories</u> : The following de	kets for televisions and speakers, heating and air-conditipment, wiring, plumbing and lighting fixtures, chandeliers, warsage door openers, cleaning equipment, shrubbery, landscar ther property owned by Seller and attached to the above-described related accessories, if any: window air conditioning	ater softener bing, outdoor escribed real units, stove,	
D.	keys, above-ground pool, swi logs, and controls for: (i) sa improvements and accessorie	nprovements and accessories will be retained by Seller a	cial fireplace nd (iv) other	
		ation by Broker/Associate name and Seller Seller Seller	Page 1 of 9	



Once all documents have been shared, go to your email account that you provided for your partner. You will have a notification from Dotloop showing that you have documents waiting. Please follow the steps as the "client" to sign.