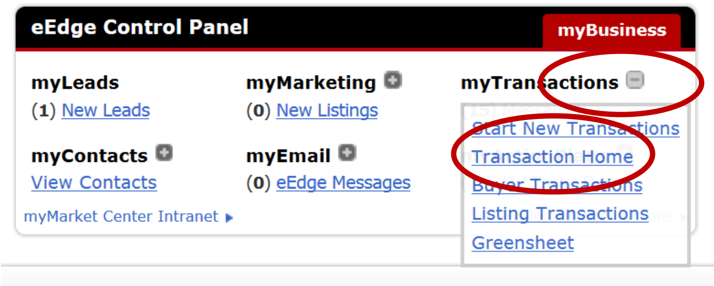
DOTLOOP 101 – Creating a Loop

Logon To MyKW.KW.COM

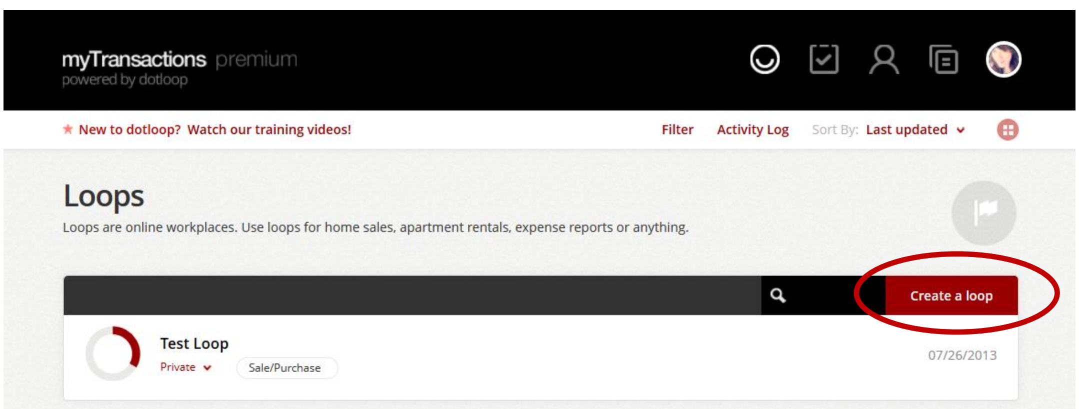
eEdge Control Panel

MyTransactions – click plus icon – select “Transaction Home”



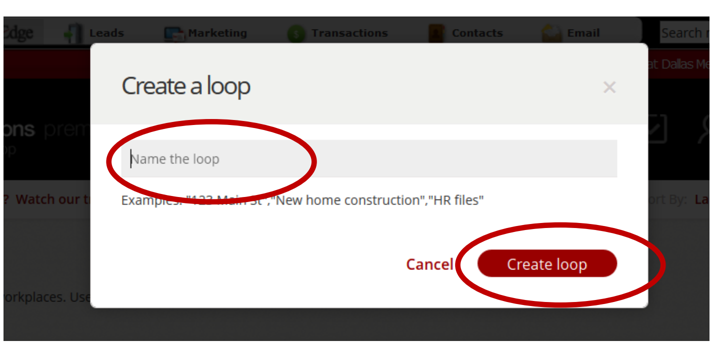
Dotloop MyTransaction Home Page

Select “Create a Loop”



Create a loop

- Name the loop: 1234 Houston Drive_Last Name
- Select “Create Loop”



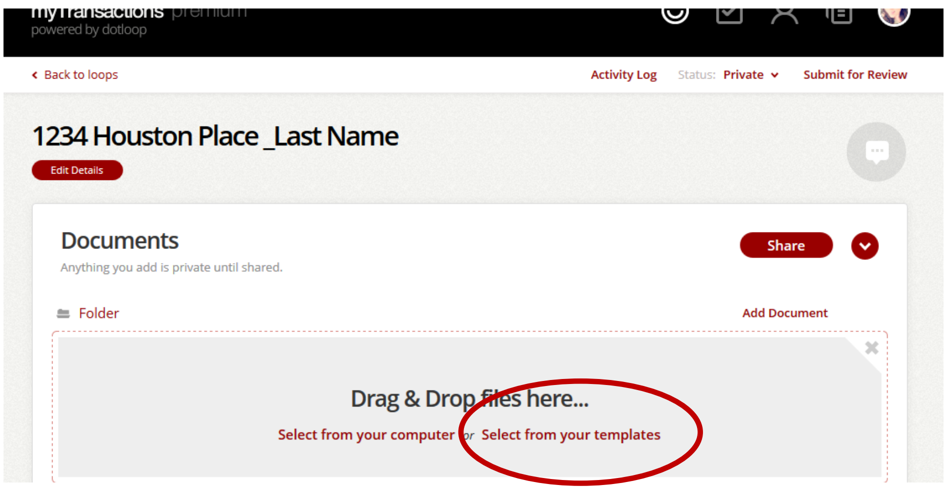
*Sample Contract- Please refer to your sample contract for the corresponding information in the next sections *

You've created a loop…What now?

<u>1234 Houston Place_Last Name</u>

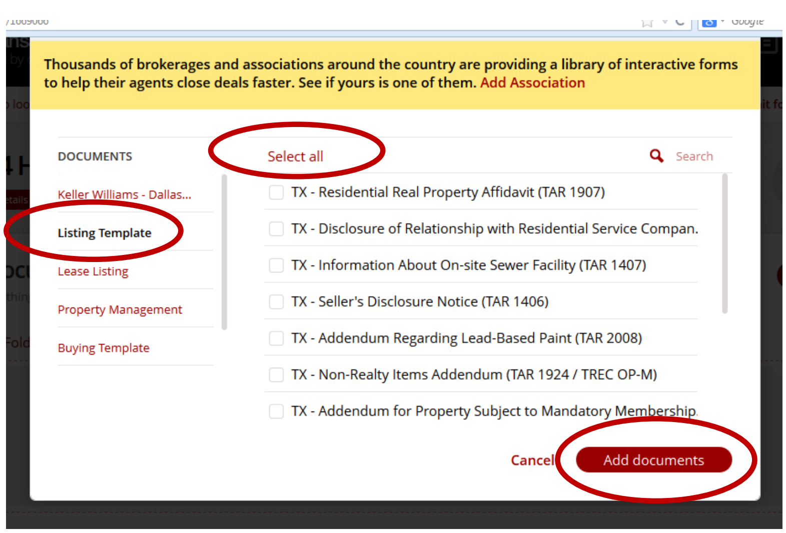
Documents

- Click "Select from your templates"



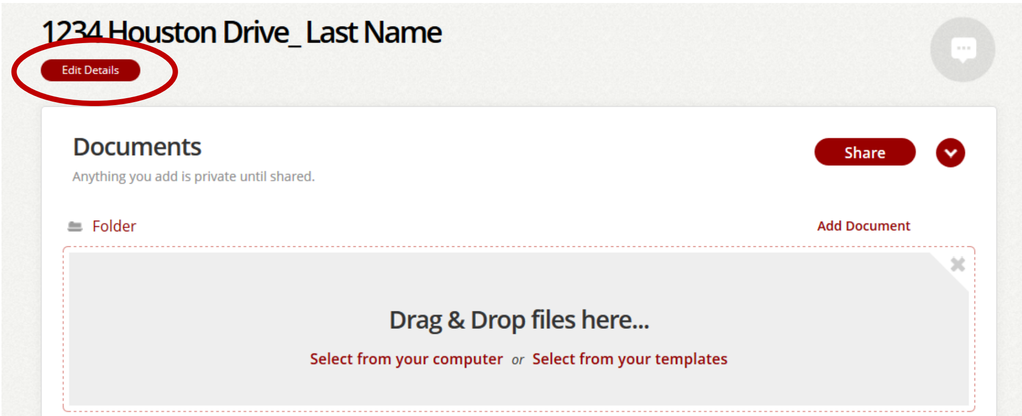
<u>Documents</u>

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



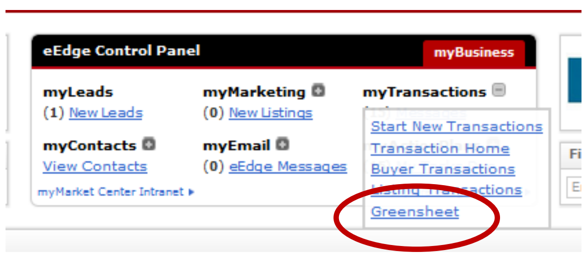
1234 Houston Drive_Last Name

- Select "Edit Details"



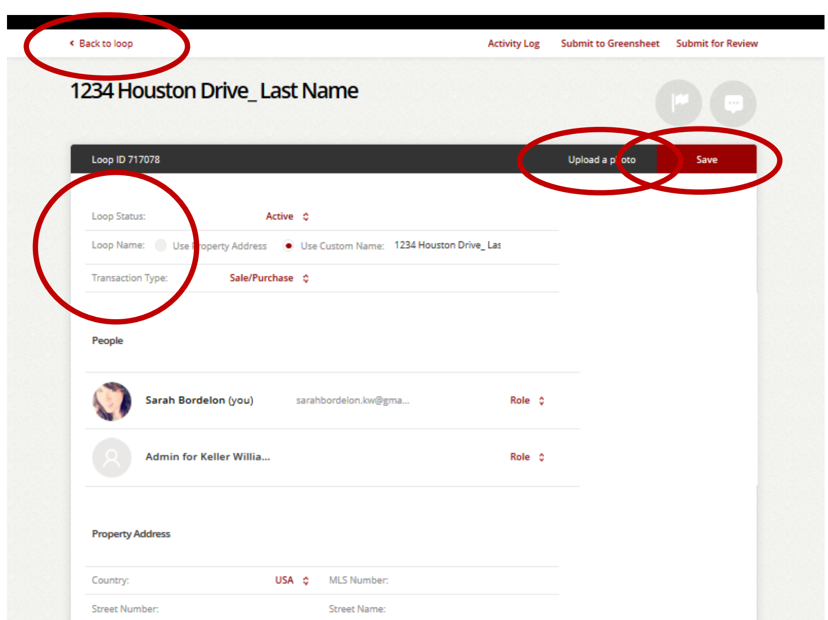
-Within Details you can edit Contract Information such as contract price, status, title, mortgage, sales price, other agent information and brokerage, photo, etc. -

- 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



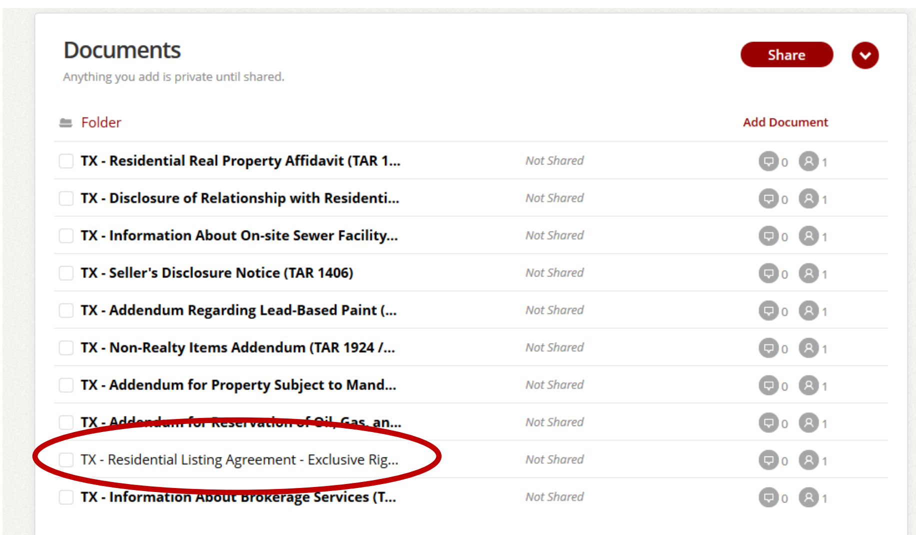
ii. Pair up with a partner, and enter their email address for this exercise. We will be sending contract documents to one another as if you were the "client". This way you will see what your clients see.

- 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

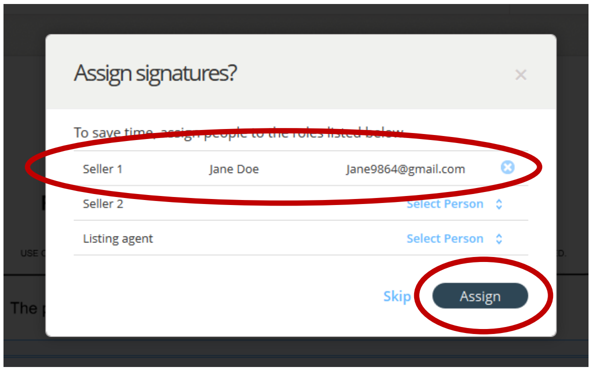
- Select "Residential Listing Agreement"



Assign Signatures?

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

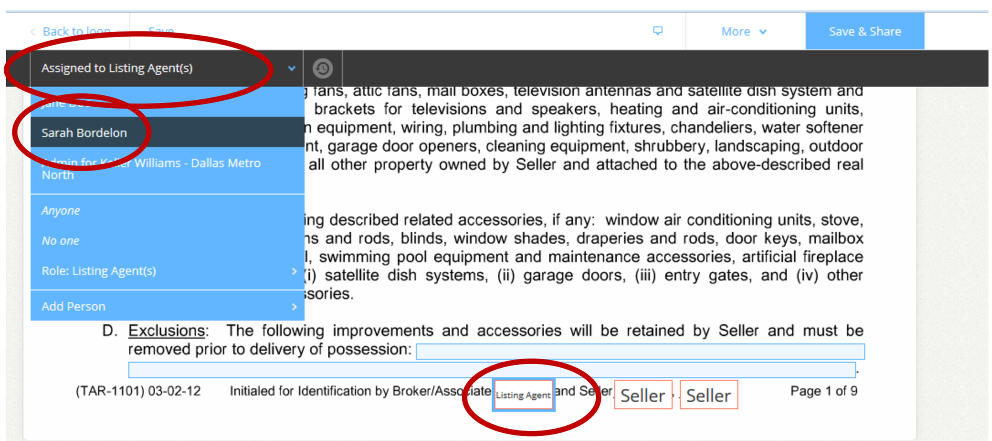
example on following page

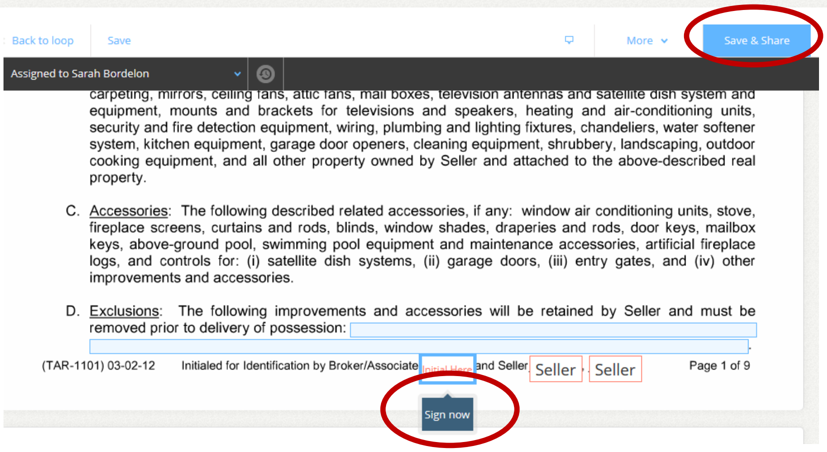


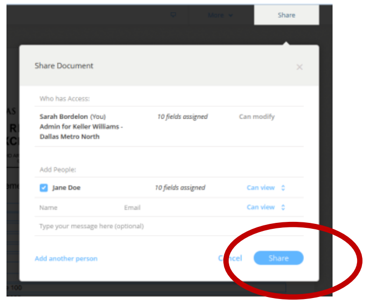
Because you have "assigned" your seller to the contract your initial and signature field for your clients will automatically populate in their signature field.

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







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.