

# Dotloop Intro

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# Agenda

- What is Dotloop / What is a Loop
- How to access Dotloop
- Edit your profile
- Create a loop
- Additional features
- Best practices

# What is Dotloop?

myTransactions premium  
powered by dotloop

- 1) Website that allows you to fill out forms and obtain signatures electronically
- 2) A place to get broker approved blank contracts & forms
- 3) A place to store all contract related documents (even those not required)

# What is a Loop?

*Think of a loop as a binder.*

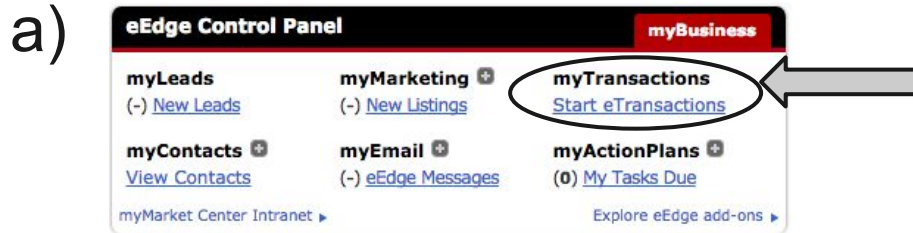
For every transaction you have a binder called a **LOOP**. In the binder there are different dividers or **FOLDERS** for each set of documents that a deal requires.

# Dotloop Basics

- Use Google Chrome: Web Browser
- Dotloop should look black/red/white (not blue)
- Documents and loops can never be deleted, they can only be archived
- Required documents can only be archived by office admin
- A loop can not be submitted with a required document missing or unsigned
- Dotloop only accepts PDF files
- Templates or Files with an \* are approved
- Dotloop does not auto-save. Save often!
- Signatures are time stamped, you do not always need to add a date field
- If you make a change to a document it will need to be re-signed
- You can look at a document's history to see who viewed and who signed
- “MLS printout” will always be gray for paperless and semi-paperless
- You only need 2 attorney review letters: start and end
- Always check to make sure auto-filled info is correct
- If submit to greensheet isn't working: check popup blocker
- Lead Paint is required for homes built before 1978
- Lead paint and listing agreement must be signed at the same time
- Submit loops for review after all required docs in a folder are signed
- In Loop view, make sure loop status is correct
- Don't add anyone to your team. They can never be removed
- eEdge and Dotloop sync contacts automatically




# How to Access Dotloop

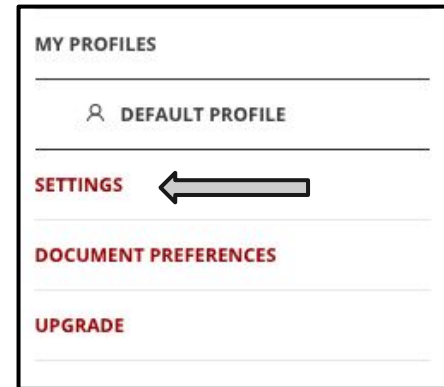
1) KW Intranet [kw.com/kw]  Log In



b) Dotloop.com (same email/password as KW intranet)

# Edit Your Profile

- Click  icon and then 
- Fill in all your info and make sure all notification settings are checked
- Click 
- Under SETTINGS you can change your email address and password



# Types of Loops

Loops can start PAPERLESS (all digital)

Loops can start SEMI-PAPERLESS (paper)



A screenshot of a document upload interface. It shows two rows of document types, each with a red 'REQUIRED' label, a checkbox, and a text description. The first row is 'Contract of Sale (Signed by Buyers)'. The second row is 'Fully Executed Contract (Signed by Sellers & ...'. A gray box labeled 'Placeholder' with an arrow points to the second row's checkbox area.



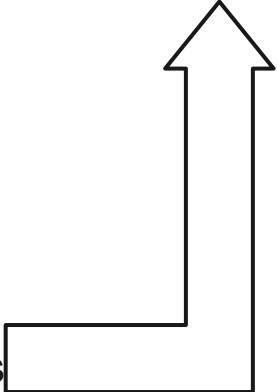
REQUIRED	<input type="checkbox"/>	Contract of Sale (Signed by Buyers)
REQUIRED	<input type="checkbox"/>	Fully Executed Contract (Signed by Sellers & ...

- You can add paper documents to a paperless loop and upload digital docs to a semi-paperless loop
- Loops that are Semi-Paperless will be filled with placeholders. You upload the matching required PDF document and drag and drop it into the correct placeholder. File name will change from gray to black



# Starting a Loop

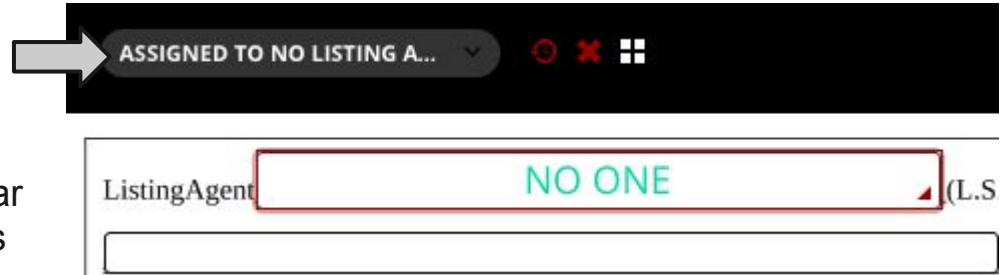


- 1) Log in to Dotloop
- 2) Click create a loop 
- 3) Name the loop using the following format
  - a) [#Street] [Town] [TYPE (caps)]
  - b) 181 Maplewood Ave Maplewood BUYER
  - c) Types: Buyer, Listing, Tenant, Landlord, Referral, Other
- 4) Click Select Template and choose TYPE of loop
- 5) Click Create Loop
- 6) Click EDIT DETAILS NOW 
- 7) Assign your role
- 8) Add: **People & Roles**, Property Address & other important details
- 9) Click SAVE
- 10) Change loop status as needed by clicking on it and selecting status 



# Working With Documents

- Open the documents you need to have signed and review that the correct fields have been auto populated
- Add or change fields using the top toolbar
- You can change who the signature fields are assigned to by clicking the signature field and then making a selection in the assignment selector
  
- When you upload a PDF there will be no fields. If you must add text to the PDF you need to create a field
- You can add text or add fields in a document by hovering your mouse of the MORE button and making a selection



# Adding Clauses \*approved by Octavio

- In templates click CLAUSES
- Select clause, highlight text, click COPY
- Open Contract
  - Paste text on page 2 of listing agreement under #21
  - 21. ACKNOWLEDGMENT OF RECEIPT OF THE NEW JERSEY ATTORNEY GENERAL'S SUMMARY OF THE NEW JERSEY LAW AGAINST DISCRIMINATION AND AGREEMENT TO ABIDE BY THE LAW.

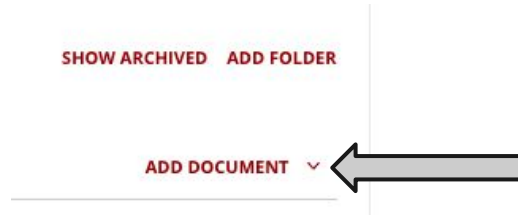
The Owner acknowledges receipt of the New Jersey Attorney General's Summary of the New Jersey Law Against Discrimination, and further acknowledges that Owner has reviewed this Summary and agrees to abide by the terms and conditions of the Law Against Discrimination.



# How to Add Document to a Loop

- Select the Folder where you want to add the document and click ADD DOCUMENT
- Select how you will add the document

- Computer
- Templates: Add one or all
- Email
  - Click EMAIL
  - Copy long email address



loop-26DouglasPIVeronaBUY-ClosingDocs-ceb89d8f-d552-438b-be91-ff3c3434ea5bz31065071@upload.dotloop.com

- Forward email with PDF attachment to unique email address
- Drag and drop newly added file into template
- If you have a gray placeholder, you can hover your mouse over the required/optional text and this will change to say ADD FILE and you can add a file directly to this placeholder



OPTIONAL

Sellers Disclosures (



# Sharing a Folder / File

- To obtain a signature a file must be shared
- Click checkbox on file or folder and press SHARE

26 Douglas Place Verona LEAD PAINT




- Select WHO you want to share with and what you want them to do
  - Can Sign (client)
  - Can Fill In & Sign (client disclosure)
  - Can Edit in Private (shared loop with other agent)
- Add others you want to share with from this screen
- Ask other agent how they want to receive contracts
  - Using Dotloop
  - As PDF: Click SHOW OPTIONS then check attach as PDF
- Click DONE

# How to Create A Folder

- You can add a folder to a loop at any time for extra deal related documents
  - Inspection reports
  - Appraisals
- Do not share these folders OR submit to office admin for review
- In a loop click ADD FOLDER top right
- Name folder: Misc. Deal Documents

## Documents

Anything you add is private until shared.

NOT SUBMITTED   BUYER DOCS

SHOW ARCHIVED ADD FOLDER

ADD DOCUMENT ▾



# How to Find Loops

- Search by name: 
- Check the FILTER  SORT BY: DEFAULT 
- Make sure your loop isn't filtered out

Loop Statuses:

- PRIVATE
- ACTIVE
- UNDER CONTRACT
- SOLD
- LEASED
- ARCHIVED

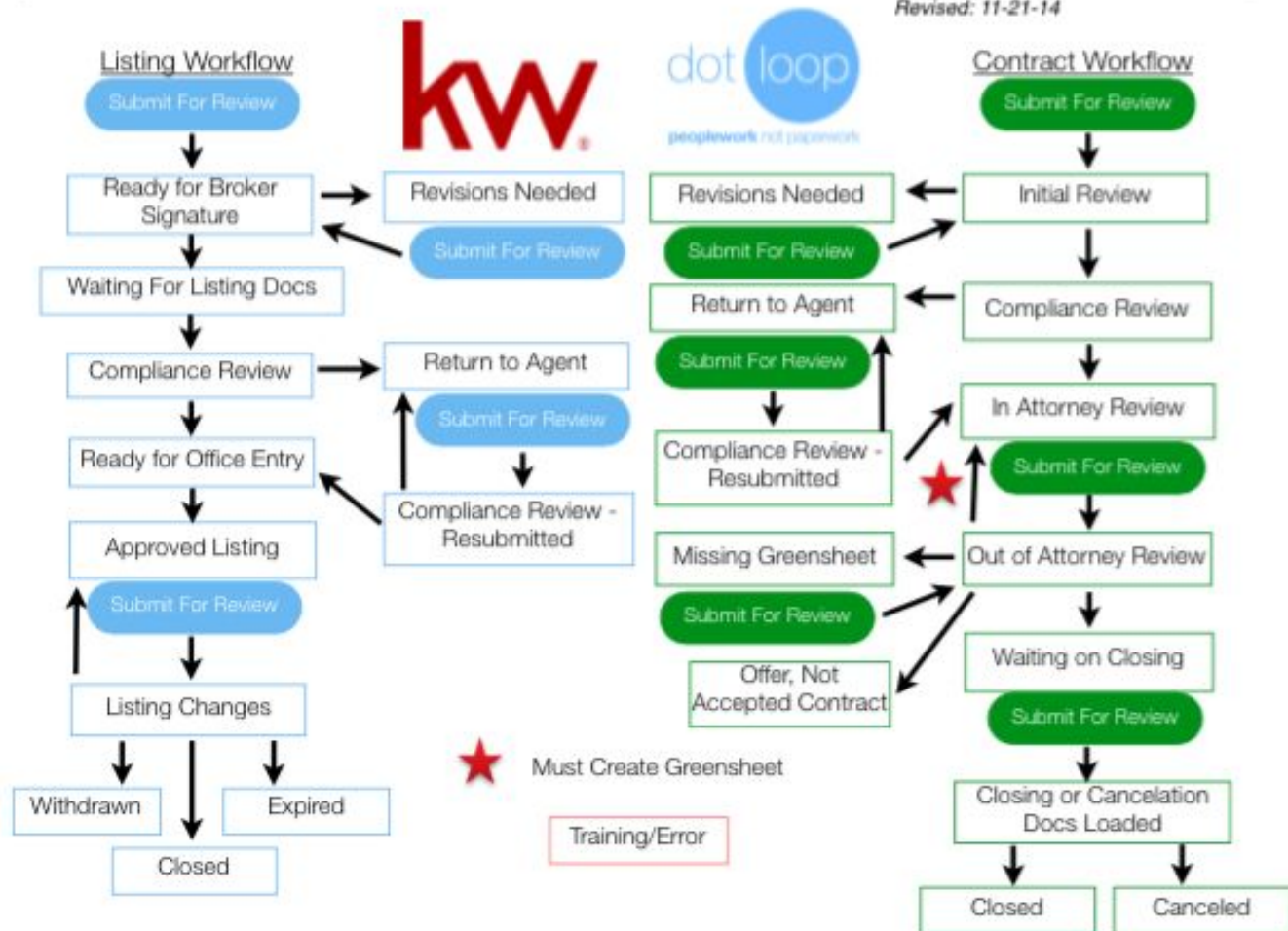
# When to Submit A Loop

- Listing: When all documents are signed by you and your clients
- Buyers: When you have an accepted offer
- Then you submit again when status changes
  - Under Contract
  - Leased
  - Sold
  - Withdrawn



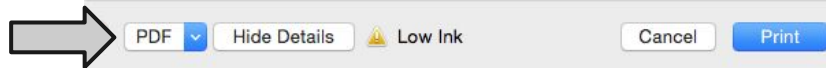
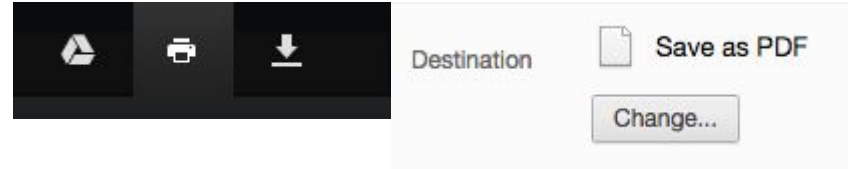
# Keller Williams Midtown Direct Review Process

Revised: 11-21-14



# Dotloop Pro Tip: Converting Document to PDF

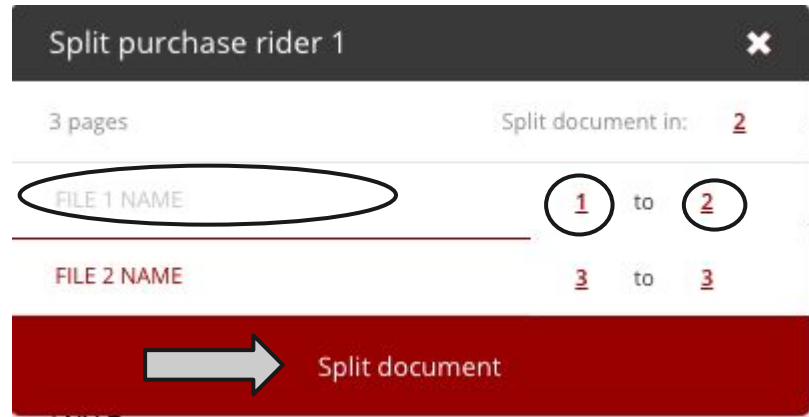
- Dotloop only accepts PDF documents
- **Using a Google Chrome Browser**
  - Open the document
  - Click print icon at top
  - Instead of selecting printer choose SAVE AS PDF
- Using a MAC: select PDF at bottom of print popup



- Use the office scanner to email documents to yourself either in batch form (will need to be split) or one at a time
- If you have a picture (jpg) of an escrow check, follow the same steps above

# Dotloop Pro Tip: Splitting a PDF in Dotloop

- If a single PDF attachment has multiple required documents you can upload once and “SPLIT PDF”
  - CIS
  - Contract
  - Disclosure
- Add document to folder
- Click document to open
- Click MORE
- Click Split Document
- Select pages to be split first
- Name the documents
- Drag and drop into required folders (new doc will be renamed)



## Dotloop Pro Tip: Sending docs to clients in batches

- You will send clients documents they need to read, sign or fill in and sign
- It's easiest for your client to receive separate emails for each task
- When sending to client select the similar types of documents and assign the roles only for that group of documents
- Click SHARE and assign roles accordingly
  - View only
  - Sign only
  - Fill In & Sign

# Troubleshooting: Why Can't I Submit My Loop?

- Are you missing a required document or signature?
- If you're sure everything is signed off and complete:
  - Find the problem document and download the PDF
  - Add a new placeholder template (gray) to the loop folder
  - Upload the PDF that was just downloaded and drag and drop it into the new placeholder.
  - Rename the OLD file ADMIN PLEASE ARCHIVE
  - Email/text office admin and we will archive for you
  - Once we confirm, try submitting loop again
- If you're trying to submit a folder that is not required you may be stuck on the share screen. If you absolutely must submit that folder make sure the folder type is selected: Press select type and choose a folder type.
- Escrow Error Message (loops older than a month)
  - Click EDIT LOOP and scroll down
  - Select who is holding the escrow check at time of contract signing

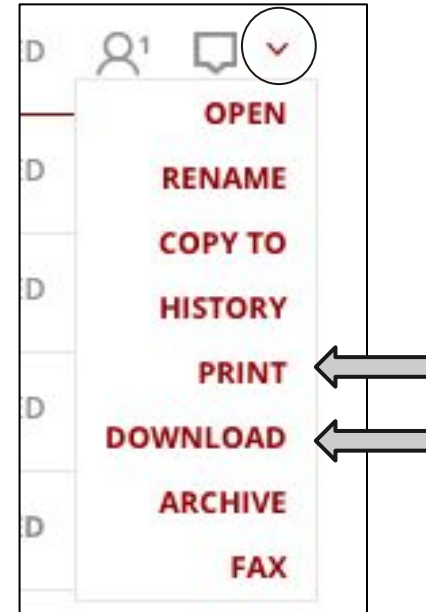
# Troubleshooting: How to Archive a Required Document

- You can NOT archive required documents
- If you have a duplicate required document OR one must be archived
  - Rename the file “Admin Please Archive: file name”
  - Click the arrow to the right of file name
  - Click Rename
  - Email or text an office admin the following:
    - Your name
    - The loop name
    - The File Name to be archived
  - Wait for confirmation and try submitting the loop again
- You can also try using the REPLACE feature
  - Upload a document to the desired folder
  - Drag and drop onto required document to replace



# Trouble sharing offer / Other agent doesn't use Dotloop

- You should always ask your participating agent how they prefer to receive offers and documents
- If they use Dotloop just add them to the loop as appropriate
- If not send them documents as PDF attachments
  - To download or print a document click the arrow to the right of the file name and make a selection
- These PDF's can be attached to an email, faxed, handed in



# Dotloop Pro Tip: Host an In-Person Signing

- If you are working with a client who does not want or who is unable to sign electronically you can still maintain a paper-less file
- To host an in-person signing you prepare documents as you normally would
  - When the document is ready for signatures open the document
  - Hover your mouse over MORE
  - Click HOST AN IN PERSON SIGNING
  - Select person signing
- Turn the computer over to your client to start electronically signing
- Once you enter an in-person signing session you must remain in the session you can't toggle between dotloop users