

dot loop agent training



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introduction:

Welcome to dotloop! We know you're excited to get started, so let's begin with a high-level overview of what dotloop is, why agents are so excited to use it, and why their customers are asking for it.

what is dotloop?

As software, dotloop is an online workspace where over 700,000 real estate professionals share and sign documents, collaborate, communicate, monitor, and manage the entire transaction start to close.

As a company, we believe in working better, together. We call this better way of working *Peoplework*, because it focuses on providing a user experience that creates lasting impressions as well as streamlined results. Once you start looping, you'll know what it means to be a *Peopleworker*.

What is a loop?

In dotloop, every transaction starts with a loop. A loop is a place where you store everything relevant to a transaction.

Everyone and everything is welcome in the loop – no limitations – making it perfectly simple to collaborate and close a transaction. No loose ends, no missed details. A loop is also safe and secure. Your data is encrypted and stored in the cloud. You'll never have to worry about losing something critical, knowing your files are safely stored in the cloud.

success tips:

Tip 1: Being paperless starts here. Please consider NOT printing this manual. It has many color screenshots that make it an easy read but a nightmare for your office printer!

Tip 2: We can teach you the features of dotloop, but we don't know about all of your office's specific dotloop processes that may exist outside of this manual. Talk to your staff about specific guidelines.

Tip 3: dotloop is optimized for the latest two versions of all internet browsers, so a good place to start is ensuring that you have the latest version of your preferred browser downloaded.

Tip 4: Have fun! Once you start looping, you'll wonder how you ever got along without us.

Tip 5: If you ever have questions, let us help you. Unlike other technology companies that only offer online videos or email support, we offer live phone support to our valued users 7 days a week!

contact support

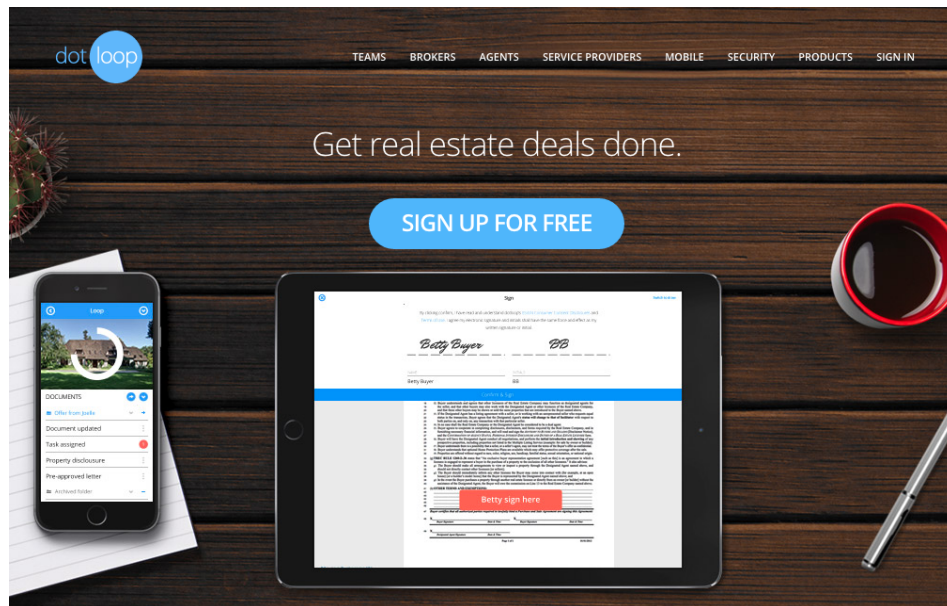
support.dotloop.com

513-257-0551

Mon- Fri 8am- Midnight EST

Saturday & Sunday 8am- 8pm EST

registration and account setup:



All registration starts at dotloop.com. Click **Sign Up For Free**.



Last week, 27,998 people signed up for dotloop

FULL NAME

YOUR EMAIL

NEW PASSWORD

SELECT ROLE

SELECT STATE

BY CLICKING SIGN UP, YOU AGREE WITH DOTLOOP'S [TERMS OF USE & PRIVACY POLICY](#).

[SIGN IN](#) IF YOU ARE ALREADY A MEMBER.

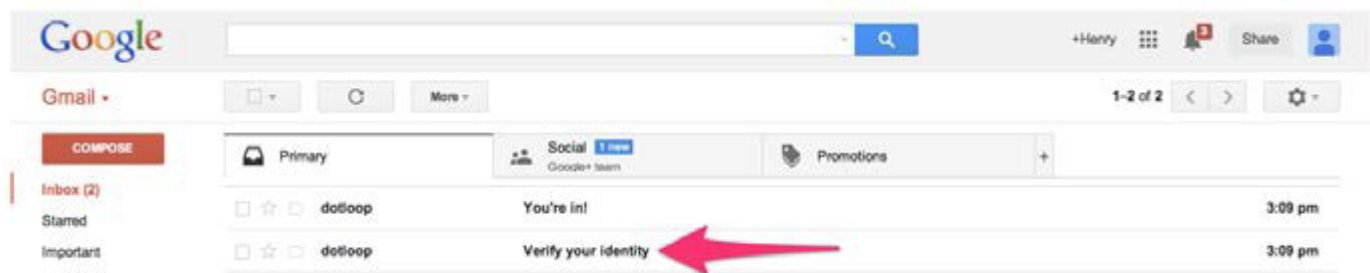
Input your full name, email address and create a password. You can also choose your role and select the appropriate state. Your office may have created a dotloop account on your behalf. In that case, check with your office staff to see which email they used for your account. Click **Sign Up For Free** once you've completed all of the information

Loops

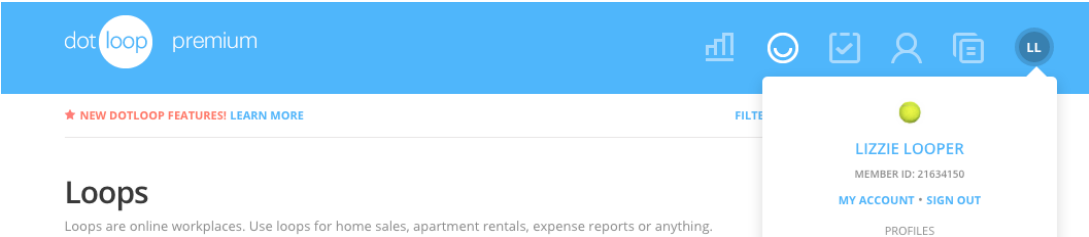
Loops are online workplaces. Use loops for home sales, apartment rentals, expense reports or anything.



You'll now be taken into your dotloop account to your loops homepage. Before going any further, you need to go to your email inbox in order to verify the account you've just created.



You'll select the *Verify your Identity* email and click on the *Verify Email* link which will direct you back to your dotloop homepage. Once back on this page, you will notice whether or not you have been attached to your company.



To complete initial account setup, hover your mouse over your initials in the upper right corner and select **My Account** from the dropdown.

dotloop premium

LL

My account

Keep your profile, notification preferences and other settings up to date.

ACCOUNT SETTINGS

PROFILES

DOCUMENT PREFERENCES

UPGRADE

YOUR CONTACT INFORMATION WILL BE USED TO AUTO FILL LOOPS AND DOCUMENTS WHEN POSSIBLE.

PERSONAL INFORMATION

REMOVE PHOTO

CHANGE PASSWORD

FIRST NAME

Lizzie

LAST NAME

Looper

USER ROLE

OTHER

EMAIL ADDRESS

cmargraf@dotloop.com

FAX

ADD FAX NUMBER

PHONE NUMBER

(555) 555-5555

ESIGN NAME

Lizzie Looper

ESIGN INITIALS

LL

COMPANY NAME

Easy 123 Realty

JOB TITLE

Agent

TAGLINE

ADD TAGLINE

This opens into your **Account Settings** page where you can edit things like your email address, password and esign name. Once you save your information here, you'll move to your **Profiles** page.

+ ADD PROFILE

AGENT DETAILS

ADD PHOTO

PROFILE NAME

Lizzie Looper

MAKE DEFAULT

PHONE

555-555-4553

FAX

ADD FAX NUMBER

PROFILE DETAILS

BROKER LICENSE NUMBER

ADD BROKER LICENSE NUMBER

OFFICE ID NUMBER

ADD OFFICE ID NUMBER

BROKER AGENT ID

ADD AGENT ID

AGENT LICENSE NUMBER

ADD AGENT LICENSE NUMBER

Here you'll want to save all of the information relevant to your company. The more you store in the **Account Settings** and **Profiles** page, the more will autofill into your loops and documents. On the right you can add a profile picture, change the name of your profile, set a profile as your **Login**

Default

COMPANY AND ASSOCIATIONS

Success Management Brokerage: Cincinnati Office - 300 W Pete Rose Way

[ADD ASSOCIATION](#)

COMPANY

COMPANY NAME

Easy 123 Realty

COMPANY OWNER NAME

COMPANY OWNER EMAIL

[ADD OWNER NAME](#)

[ADD OWNER EMAIL](#)

ADDRESS

1234 Main Street

CITY

Cincinnati

COUNTRY

USA

STATE/PROVINCE

OH

ZIP/POSTAL CODE

45202

You can also attach to your state or local association if we have an agreement with them. Most associations we have forms agreements with will require NRDS validation and once you enter your ID, it will be saved to your dotloop account and autofill for you as needed. If your association requires an invitation code, you can call our support team to gain access to those forms!

EMAIL NOTIFICATIONS

☒ DOCUMENT SHARED

☒ DOCUMENT SIGNED

☒ YOUR SIGNATURE REQUIRED

☒ MESSAGE RECEIVED

☒ COMPLIANCE STATUS OF A LOOP IS UPDATED

☒ MY OFFICE ADDS A TAG TO A LOOP OR DOCUMENT

☒ MY OFFICE WRITES A MESSAGE ABOUT A LOOP OR DOCUMENT

☒ DAILY TASK REMINDERS

SAVE

The last thing you can do on this page is control your notification preferences. By default dotloop has elected you receive *all* email notifications. We recommend testing this out for a bit before you deselect anything. Once you're up and running on the system, you can return to this page and customize your preferences!

My account

Keep your profile, notification preferences and other settings up to date.

ACCOUNT SETTINGS

PROFILES

DOCUMENT PREFERENCES

UPGRADE

DOCUMENT EDITOR PREFERENCES

DEFAULT FONT

SERIF

FONT STYLE

NORMAL

FONT COLOR

BLUE

FONT SIZE

12PT

PREVIEW

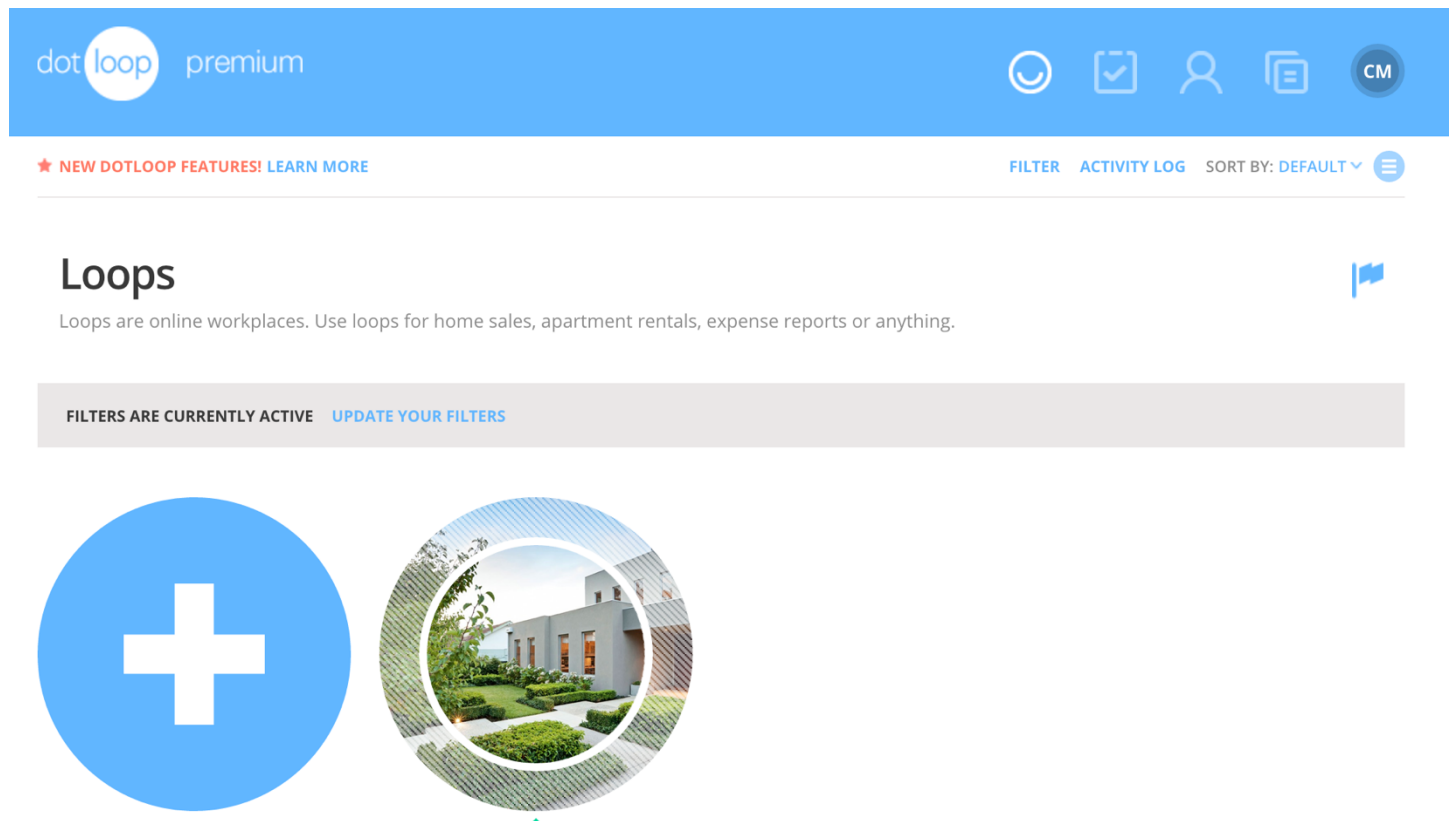
Grumpy wizards make toxic brew for the evil Queen and Jack.

Finally, in this section of dotloop you can also set your **document preferences**. Here you can save your preferred font style, size and color that dotloop will default to when you place fields on documents such as PDF files.

The **UPGRADE** tab is where an agent would go to upgrade their account premium. Since you're already a premium user, you don't have to worry about this section!

navigation:

In this section, we'll give you an overview of the homepage and then take a look at the various aspects of a loop.



All of the links in the upper blue bar are your global navigation icons. Starting from the top left and moving right, let's discuss each icon. *For a more detailed look into each of the icons in your global navigation bar, see the **focused topics** section of this manual.*



The dotloop icon and loops icon (smiley face) will always take you back to the homepage where you can find all of your transactions- or “loops”



The tasks icon (check mark) compiles all of the tasks from all of your loops into one place. This allows you to quickly see everything that is due throughout all of your transactions.



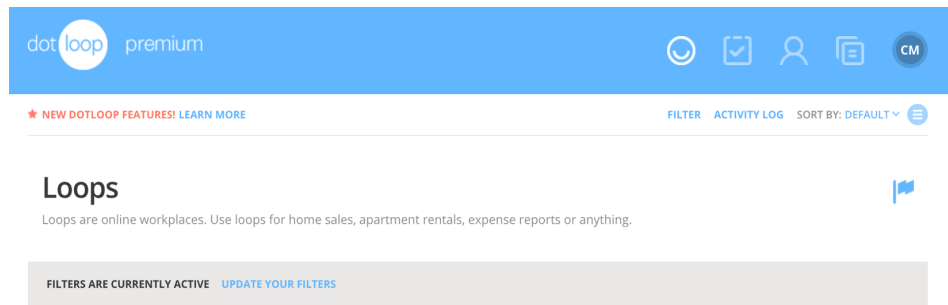
The people icon (people) keeps a contact list of anyone you've ever added to a loop. If you work with the same person on a loop in the future, dotloop will auto-suggest that person as you start typing in their name or email address into your new loop.



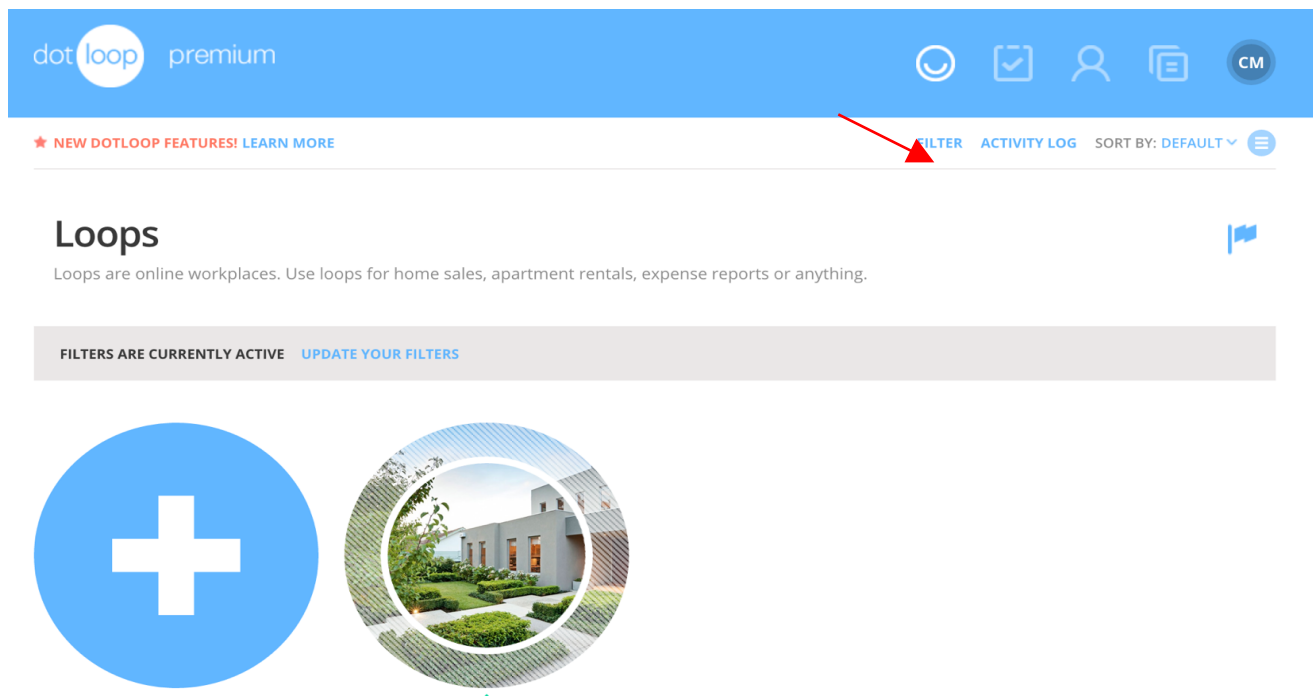
The templates icon (documents) houses the documents or document sets that your brokerage or association has made available to you. You can print blank documents from here, but if you would like to edit a document or obtain e-signatures, you will need to create a loop and add the desired document template from within the document section of that loop.



My account icon (your initials) allows to you to switch between profiles, manage your account settings, or sign out of dotloop. You can also add a profile picture, manage your notification preferences, and change your email/password.



When you're ready to create your first loop, the blue '+' is where you will click. The circle to the right of the '+' is a sample loop that you can open to see how a completed loop works and looks.



The screenshot shows the dotloop premium interface. At the top, there's a navigation bar with the dotloop logo and 'premium' text. Below it, there are links for 'NEW DOTLOOP FEATURES! LEARN MORE', 'FILTER', 'ACTIVITY LOG', and 'SORT BY: LAST UPDATED'. The main section is titled 'Loops' and contains a list of property loops. Each loop entry includes a circular status icon, the address, the current status, and the date. The status icons are color-coded: red for 'LISTING FOR SALE', blue for 'PURCHASE', and grey for 'ARCHIVED'.

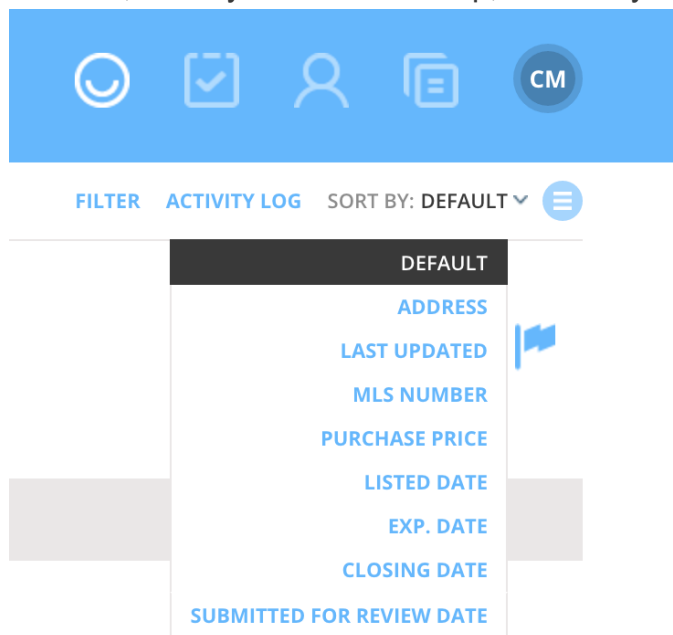
Address	Status	Date
2700 Bearcat Way, Cincinnati, OH 45219	LISTING FOR SALE - ACTIVE LISTING - LISTING APPROVED	10/25/2016
8909 Treeridge Drive, Cincinnati, OH 45244	LISTING FOR SALE - ARCHIVED	10/25/2016
1501 Eden Park Drive, Cincinnati, OH 45202	LISTING FOR SALE - ARCHIVED	10/25/2016
100 West North Broadway (Listing Loop)	PURCHASE - ARCHIVED - CONTRACT NEEDS REVIEW	10/25/2016
test	PURCHASE - ARCHIVED	10/29/2016

Clicking on **Filter** will display a dropdown of your filtering options. Each loop has a **Review Stage** and a **Loop Status**. The review stage of a loop is controlled by your broker/admin and is discussed in detail later. The loop status is like a filing system that you control. It helps you manage which loops appear on your homepage. For example, if you only want to see the loops that you've labeled with the loop statuses of **Private**, **Active**, and **Under Contract**, check those statuses and click the blue **Filter** button on the right. Now your homepage will hide all of the loops that you have identified as **Sold**, **Leased**, and **Archived**. Use the **Archived** status to remove practice loops or irrelevant loops from your homepage. If you logout of dotloop with filters set, your profile will remember these filters for the next time you login.

If you ever cannot find a loop, we recommend you clear all of your filters using the Clear All button and then Filter. This will show all loops again and you can use the dynamic search bar to search for any keyword of the loop name.

This screenshot shows the bottom part of the dotloop premium interface. It includes the dotloop logo and 'premium' text. Below it, there are links for 'NEW DOTLOOP FEATURES! LEARN MORE', 'FILTER', 'ACTIVITY LOG', and 'SORT BY: DEFAULT'. A red arrow points to the 'Filter' button.

The **Activity Log** link on the homepage will display the activities that have taken place throughout all of your loops. If you would like to see the activity for a specific loop, just open any loop and the activity log will be in the same place, but will only show that loop's activities. The activity log is like an audit trail of the actions taken in each loop. For example, you could go there to see when a folder was submitted to the office for review, when a document was shared, when someone viewed a document, when someone signed a document, when you created a loop, or when you added a person to a loop.



Clicking **Sort By** will display options that allow you to reorganize the order in which your loops appear on your homepage.

Default: allows you to sort your loops in a way that dotloop has predicted will be the most helpful. This is a combination of your last updated loop and the number of notifications within the loop, in descending order.

Agent name: allows you to sort your loops by the agent who creates them. The agents will be sorted in alphabetical order by first name.

Address: Sorting by *address* will sort your loops numerically first, then alphabetically, based on the address you provided in the *Edit Details* of your loops, **not the title of the loop**. For example: **123 Main Street** will display before **123 Wynne Place**. On that same note, **1123 Main Street** will display before **123 Main Mainstreet**. This is because dotloop looks at the first character, then the second, then the third, etc. and sorts by those characters. Loops that do not have addresses entered in the *Edit Details* will display at the bottom of the list.

Last updated: Sorting by *last updated* is very straightforward. If anything has changed in a loop, at all – document signing, review stages, people being added, messages sent, etc., the most recent loop meeting these requirements will appear at the top of the list. Loops will display in descending order based on the last change made within them.

MLS number: Sorting by the *MLS Number* is very similar to sorting by *address*. It is based on the first, second, third, etc., character in the MLS Number. So, **11458973** would come before **18556**, for example.

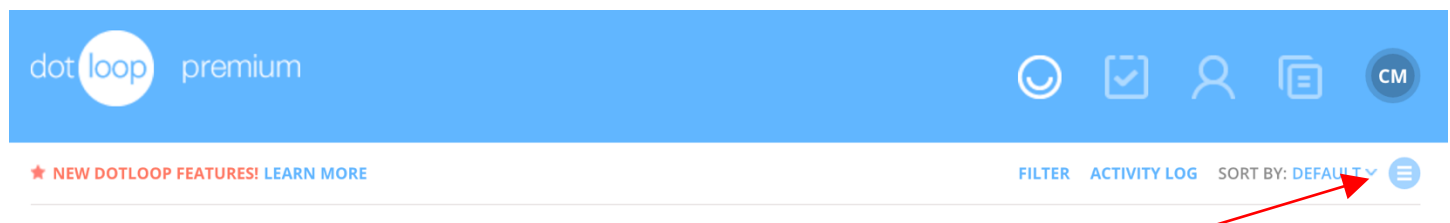
Purchase price: Sorting by *Purchase Price* will display your loops in order by the dollar amount entered in the purchase price field within a loop's *Edit Details* page. The largest number displaying first, the lowest displaying last. Loops without a purchase price in the *Edit Details* will be moved to the bottom of the list.

Listed date: Sorting by *Listed Date* will pull the listing date from the *View Details* page of each loop, displaying the loops with the newest listing date first. Loops without the listing date filled out in *View Details* will display at the bottom of the list.

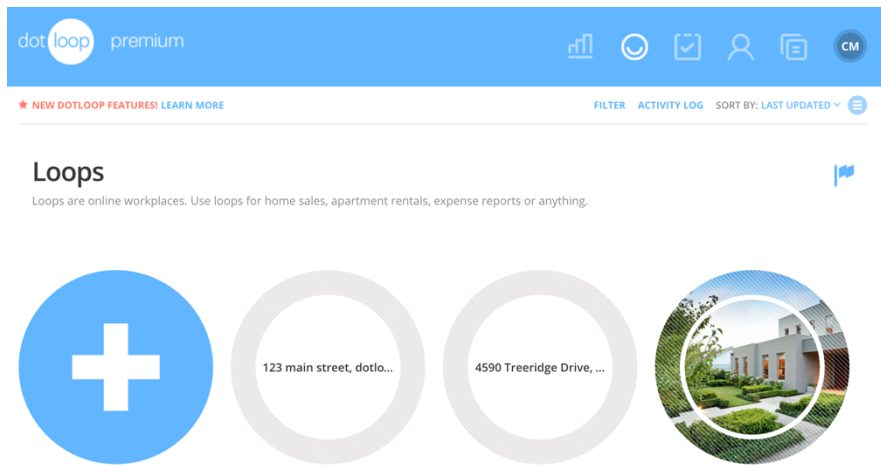
Expiration date: Sorting by *Expiration Date* will display loops that expire soonest or have already expired, based on the expiration field under the *Listing Information* portion of a loop's *View Details* page.

Closing date: Sorting by *Closing Date* will display loops that close soonest or have already closed, based on the closing date field under the *Contract Dates* portion of a loop's *View Details* page.

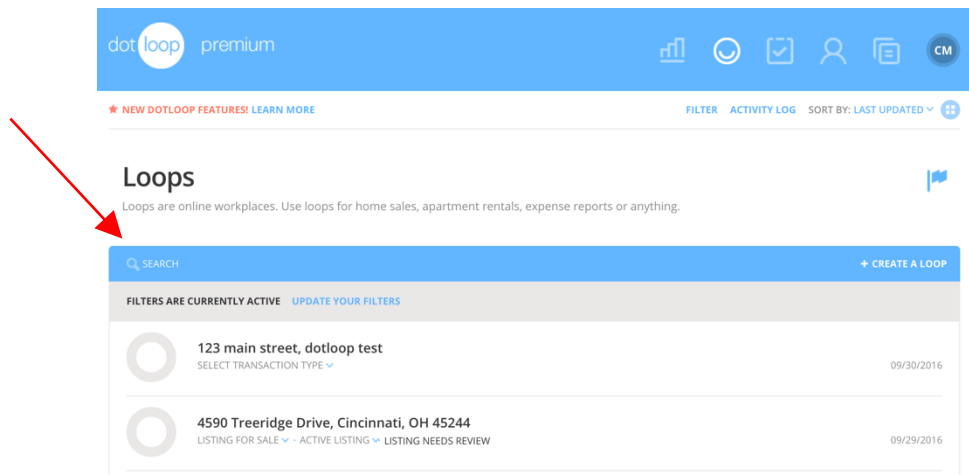
Submitted for review date: Sorting by *Submitted For Review Date* will sort loops that were submitted for review most recently, first.



The layout button (above), allows you to toggle between two different views of your homepage (shown below). These different views are primarily a visual preference. Once you settle on your favorite layout, dotloop will remember it when you logout.



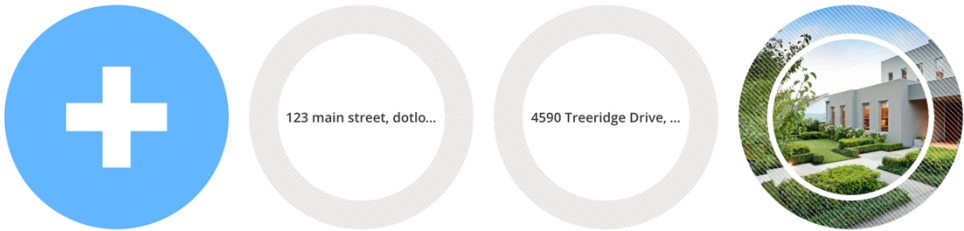
This is the grid view. This is the default view when you first create an account. If you have added a picture to the loop, it will be displayed on the homepage. If you want to see the name of a loop, hover over it.



This is the list view. It presents all of your loops in a vertical list, like an email inbox. It also has the added benefit of a dynamic search bar (see arrow). This search bar is sensitive to any piece of the custom loop name but will not search for loops that you have filtered out of your homepage.

Loops

Loops are online workplaces. Use loops for home sales, apartment rentals, expense reports or anything.



The blue flag on your homepage identifies all of the notifications that you have received through your loops. These notifications will then be broken down on each loop. Some examples of notifications include when a document was modified, when a document was signed, and when you have a new message.

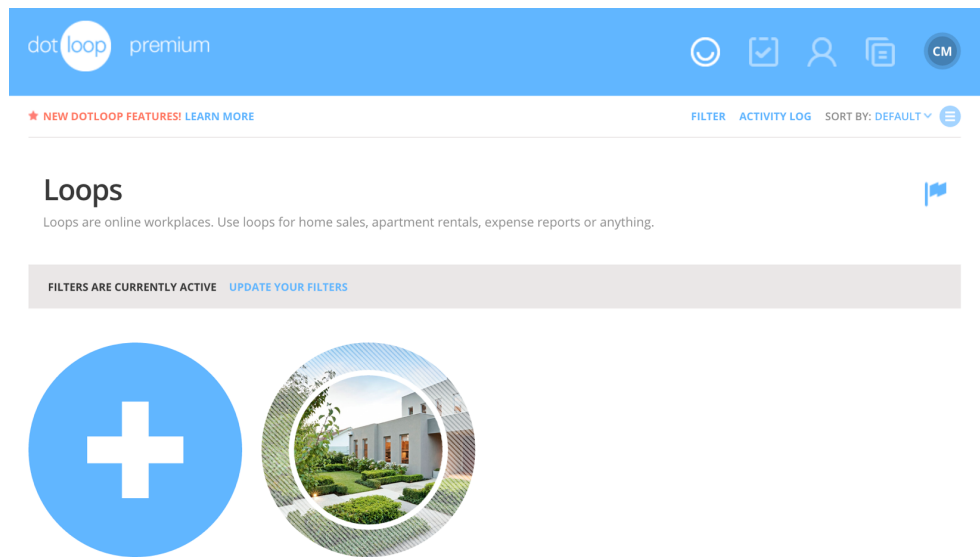


Pictured above is a loop as displayed on the grid view. The blue shaded section represents the percentage of tasks that have been completed for this loop (the loop has a little more than 25% of its tasks complete). The red circle with a '1' in the middle means that this loop has one new notification. Now let's take a look at the inside of a loop.

creating a loop:

how to create a loop:

Imagine a traditional paper transaction that you've organized into a manila folder so that you can drop it off on your admin's desk. Or maybe you've uploaded all of your transaction documents as an email attachment in order to send them to your admin for review. Now you'll be able to do all of these things in dotloop!



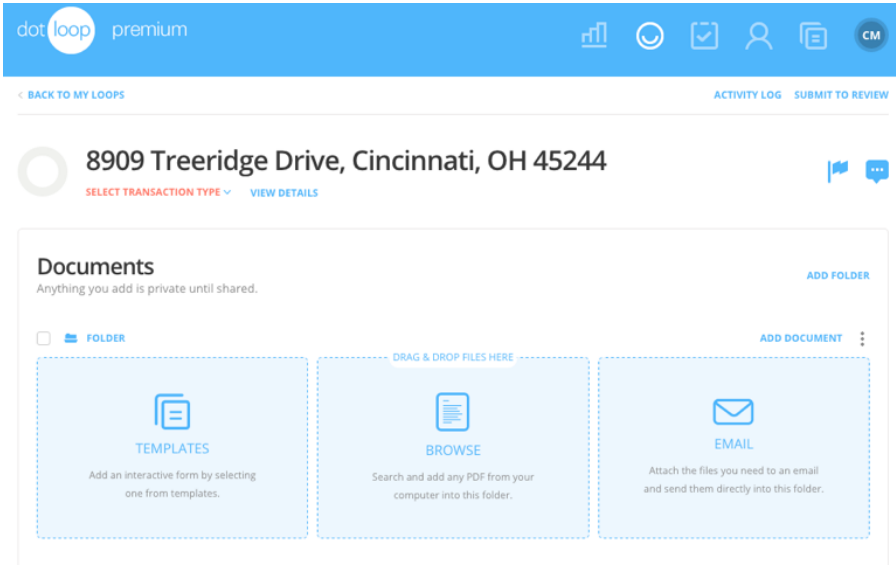
To begin a new transaction, you will first need to create a loop. Click the blue '+' sign to create a new loop. Think of this step like grabbing a new manila folder, or clicking 'compose' in an email.

A screenshot of a 'Create a loop' dialog box. The dialog has a blue header with the title 'Create a loop' and a close button (an 'x' icon). The main body of the dialog is white and contains the text: 'A loop is a workspace for your transactions or projects. Name it whatever you want or type in an address or MLS number to find matching listings.' Below this text is a text input field with the placeholder text 'NAME YOUR NEW LOOP'. At the bottom right of the dialog is a blue button with the text 'CREATE LOOP'.

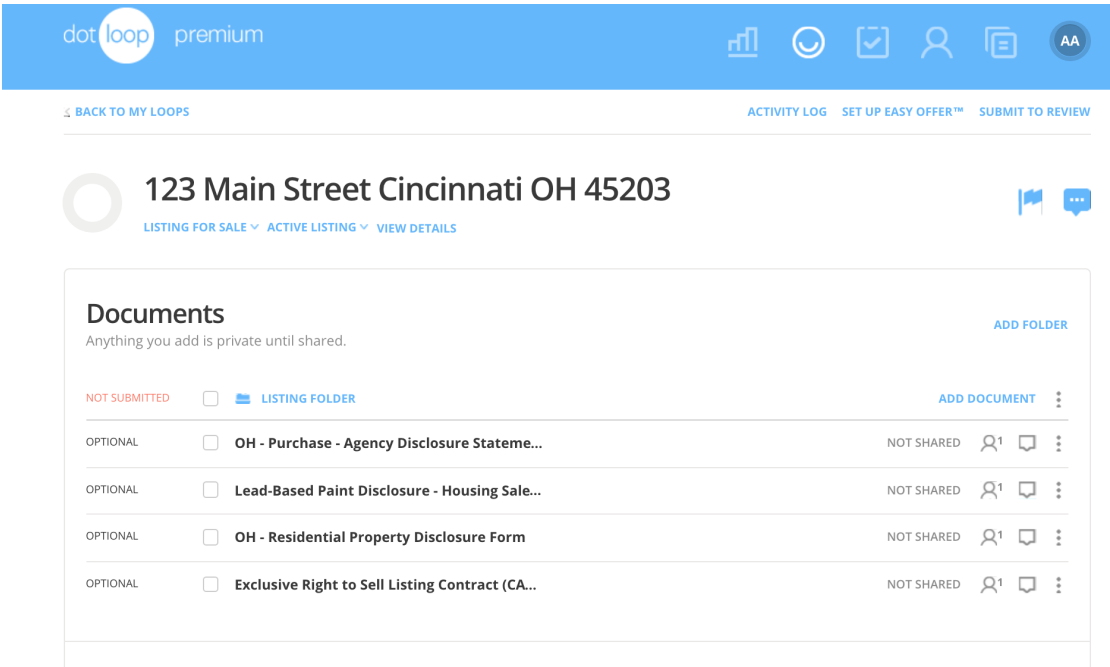
Name your loop and click the **Create Loop** button. Keep in mind that your office may have specific

instructions on how they would like you to name your loop, *just like you would in an email subject line or manila folder heading.*

loop navigation:




A loop is divided into three main sections: documents, people, and tasks. The first thing you might notice is that you can still see your global navigation bar at the top of the loop. Ignore it! You can do everything you need to do from below that blue navigation bar. This is what a loop looks like:



People


Invite your clients, vendors and even those on the other side of the negotiation! No one can see who you invite.



Admin for Success Management Bro...

ON MY TEAM

ADMIN ▾



Alan Agent (you)

dotloopmeggie@gmail.com

NONE ▾

Tasks

Use tasks to coordinate activities with others.

MOVE TO TOP

LOAD TEMPLATE

ADD TASK LIST

LISTING

☐ Put Sign in Yard

UNASSIGNED · NO DUE ... ▾

☐ Enter MLS Info

UNASSIGNED · NO DUE ... ▾

☐ Get Client Contact Info

UNASSIGNED · NO DUE ... ▾

☐ Schedule Open House

UNASSIGNED · NO DUE ... ▾

☐ Send email to Marketing for Post Cards

UNASSIGNED · NO DUE ... ▾

☐ Update client information

UNASSIGNED · NO DUE ... ▾

ADD A TASK...

At the top of the loop, moving from the left to right, you will see an **Activity Log** that is specific to this loop. The **Submit to Review** link starts the file review process. It's the virtual equivalent of turning in your paper files.

dotloop premium

AA


BACK TO MY LOOPS

ACTIVITY LOG

SUBMIT TO REVIEW

123 Main Street Cincinnati OH 45203

Moving down the loop you will see the loop name with several items underneath. First, click on the **Transaction Type**. In this example, we've selected that the transaction is a listing for sale.



123 Main Street Cincinnati OH 45203

PURCHASE ▾

SELECT LOOP STATUS ▾

VIEW DETAILS

Docu

Anything

til shared.

PURCHASE

LISTING FOR SALE

LISTING FOR LEASE

LEASE

REAL ESTATE OTHER

OTHER

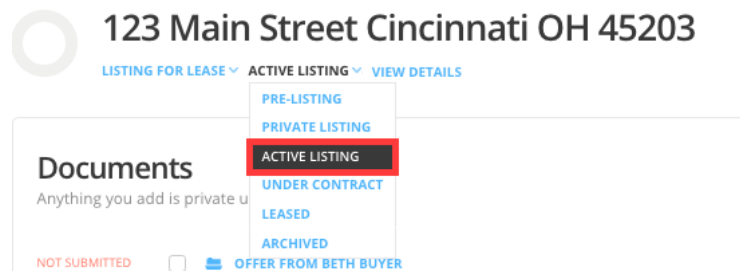
NOT SUBMITTED

OFFER FROM BETH BUYER

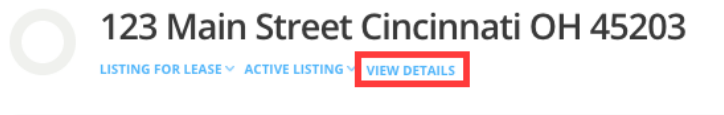
Next, select the **Loop Status**. As an agent, this is your tool so you know exactly where you are in the transaction. Selecting a status will also help make your listing searchable within the dotloop network

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(we will discuss this in detail a little later).



Finally, click on the **View Details** link. Clicking here will allow you to fill out basic information about this transaction that will help you auto-populate the Interactive Templates that you add to the loop's document section. You will also be able to sort all of the loops on your homepage by certain fields of the details section (i.e. expiration date, closing date, property address, etc.). This also helps create some consistency within your loop so if you need to find specific information about a transaction later it's all in the same place.



Within the **View Details** section is all the relevant information about the loop you are working on. Fill this out in as much detail as possible (keep in mind you can always come back to fill out and change information as necessary).



+

UPLOAD A PHOTO

SAVE

TRANSACTION TYPE

LISTING FOR LEASE

LOOP STATUS

ACTIVE LISTING

LOOP NAME

USE PROPERTY ADDRESS

USE CUSTOM NAME: 123 Main Street Cincinnati O

PEOPLE

ADD PERSON

Alan Agent (you)

dotloopmeggie@gmail.com

NONE

EDIT

Admin for Success Management Bro...

ADMIN

EDIT

PROPERTY ADDRESS

PROPERTY

Q

SEARCH BY ADDRESS OR MLS NUMBER

We'll suggest addresses or listings that match.

COUNTRY

USA

STREET NUMBER

ADD STREET NUMBER

STREET NAME

ADD STREET NAME

UNIT NUMBER

ADD UNIT NUMBER

CITY

ADD CITY

STATE/PROV

SELECT

ZIP/POSTAL CODE

ADD ZIP/POSTAL CODE

COUNTY

ADD COUNTY

MLS NUMBER

ADD MLS NUMBER

PARCEL/TAX ID

ADD PARCEL/TAX ID

FINANCIALS

RENT

ADD RENT

RENT COMMISSION AMOUNT

ADD RENT COMMISSION AMOUNT

RENTAL TERM

ADD RENTAL TERM

SECURITY DEPOSIT

ADD SECURITY DEPOSIT

LATE FEE

ADD LATE FEE

SALE COMMISSION SPLIT \$ - BUY SIDE

ADD SALE COMMISSION SPLIT \$ - BUY SIDE

SALE COMMISSION SPLIT \$ - SELL SIDE

ADD SALE COMMISSION SPLIT \$ - SELL SIDE

OFFER DATES

OCCUPANCY DATE

ADD OCCUPANCY DATE



Documents

Anything you add is private until shared.

[ADD FOLDER](#)

NOT SUBMITTED	<input type="checkbox"/>	OFFER FROM BETH BUYER	ADD DOCUMENT	
PDF	<input type="checkbox"/>	Contract	SHARE	NOT SHARED 1
NOT SUBMITTED	<input type="checkbox"/>	LISTING FOLDER	ADD DOCUMENT	
OPTIONAL	<input type="checkbox"/>	OH - Purchase - Agency Disclosure State...		NOT SHARED 1
OPTIONAL	<input type="checkbox"/>	Lead-Based Paint Disclosure - Housing Sale...		NOT SHARED 1
OPTIONAL	<input type="checkbox"/>	OH - Residential Property Disclosure Form		NOT SHARED 1
OPTIONAL	<input type="checkbox"/>	Exclusive Right to Sell Listing Contract (CA...		NOT SHARED 1

The **Documents** section of a loop is where you add and manage all of your folder and documents for a transaction. In the example above, the listing agent has created a folder to manage the original listing documents. He has also created a second folder and uploaded the offer that came in from the buying agent. We recommend creating separate folder to manage each offer that comes in on your listing.

People

Invite your clients, vendors and even those on the other side of the negotiation! No one can see who you invite.

[ADD PERSON](#)

	Admin for Success Management Bro...	ON MY TEAM	ADMIN	
	Logan Junger	ljunger@dotloop.com	ESCROW/TITLE	
	Alan Agent (you)	dotloopmeggie@gmail.com	LISTING AGENT	
	Suzi Seller	dotloopsuziseller@gmail.com	SELLER	
	Carrie Co-Op Agent	carriecoop@gmail.com	BUYING AGENT	

In the **People** section of a loop you can add anyone that you would like to share documents, tasks, or

messages with. Remember, the people that you add to a loop will only see what you’ve shared with them.

Tasks

Use tasks to coordinate activities with others.

MOVE TO TOP

LOAD TEMPLATE

ADD TASK LIST

LISTING

☐

Put Sign in Yard

UNASSIGNED · NO DUE ...

☐

Enter MLS Info

UNASSIGNED · NO DUE ...

☐

Get Client Contact Info

UNASSIGNED · NO DUE ...

☐

Schedule Open House

UNASSIGNED · NO DUE ...

☐

Send email to Marketing for Post Cards

UNASSIGNED · NO DUE ...

☐

Update client information

UNASSIGNED · NO DUE ...

ADD A TASK...

The **Tasks** section allows brokers and admins to assign tasks to you. It also allows you to manage your own lists. Creating a task list for your client is a great way to add value to their experience, guiding them through each and every step of the buying process.

initial loop setup:

Now that we’ve created our loop, we’re ready to start working! Let’s head to the **View Details** page to store information relevant to our transaction.

8909 Treeridge Drive, Cincinnati, OH 45244

LISTING FOR SALE

ARCHIVED

VIEW DETAILS

ADD FOLDER

Documents

Anything you add is private until shared.

NOT SUBMITTED

☐

FOLDER

ADD DOCUMENT

PDF

☐

Training Contract

3

The **View Details** section of each loop houses specific dates and information about the transaction. The information in **View Details** is used to auto-populate Interactive Templates. Let’s open **View**

Details and see all of our options.



8909 Treeridge Drive, Cincinnati, OH 45244

LOOP ID 16144843



[+ UPLOAD A PHOTO](#)[SAVE](#)

TRANSACTION TYPE	LOOP STATUS	LOOP NAME
<div>LISTING FOR SALE</div>	<div>ARCHIVED</div>	<div><input checked="" type="radio"/> USE PROPERTY ADDRESS</div> <div><input type="radio"/> USE CUSTOM NAME: 8909 Treeridge Drive, Cincin</div>

You can always change the custom name of the loop by clicking on the current name of the loop. Once you enter the property address into the details tab of a loop you can also select **Use Property Address**, which will adjust the loop name to use a standard naming convention.

If you would like to add a photo to your loop, click the **Upload A Photo** in the blue bar at the top of the **View Details** page. This photo will show in the loop from Grid View and at the top of the loop if the loop is open!

PEOPLE

ADD PERSON

Dana Kilcoyne (you)

dotloopdana@gmail.com

NONE

EDIT

Admin for Success Management Bro...

ADMIN

EDIT

Carol Eliza Seller

carolseller22@gmail.com

NONE

EDIT

Caroline Margraf

cmargraf@dotloop.com

NONE

EDIT

As you scroll through **View Details**, you will first see an overview of the people that you have added to the loop. You can also add a new person from this section as well by clicking on **Add Person**. The remainder of View Details tab acts as a cover sheet. The information that you input here, such as property address, key dates, and MLS data, will populate into your Interactive Templates.

PROPERTY ADDRESS

PROPERTY

Q

SEARCH BY ADDRESS OR MLS NUMBER

We'll suggest addresses or listings that match.

COUNTRY

USA

▼

STREET NUMBER

8909

STREET NAME

Treeridge Drive

UNIT NUMBER

ADD UNIT NUMBER

CITY

Cincinnati

STATE/PROV

OH

▼

ZIP/POSTAL CODE

45244

COUNTY

ADD COUNTY

MLS NUMBER

ADD MLS NUMBER

PARCEL/TAX ID

ADD PARCEL/TAX ID

FINANCIALS

PURCHASE/SALE PRICE

ADD PURCHASE/SALE PRICE

SALE COMMISSION RATE

ADD SALE COMMISSION RATE

SALE COMMISSION SPLIT % - BUY SIDE

ADD SALE COMMISSION SPLIT % - BUY SIDE

SALE COMMISSION SPLIT % - SELL SIDE

ADD SALE COMMISSION SPLIT % - SELL SIDE

SALE COMMISSION TOTAL

ADD SALE COMMISSION TOTAL

EARNEST MONEY AMOUNT

ADD EARNEST MONEY AMOUNT

EARNEST MONEY HELD BY

ADD EARNEST MONEY HELD BY

SALE COMMISSION SPLIT \$ - BUY SIDE

ADD SALE COMMISSION SPLIT \$ - BUY SIDE

SALE COMMISSION SPLIT \$ - SELL SIDE

ADD SALE COMMISSION SPLIT \$ - SELL SIDE

CONTRACT DATES

CONTRACT AGREEMENT DATE

ADD CONTRACT AGREEMENT DATE

CLOSING DATE

ADD CLOSING DATE

Make sure to **Save** any information you add! **Save** can be found at the top right and bottom right of the **View Details** page.

AUTOFILL SETTINGS

The information below will be used to auto populate documents. Documents from the loop will be used to auto populate this page.

CONTRACT DATA SHOULD AUTO FILL TO AND FROM

ALL DOCUMENTS

NEW FOLDER

FOLDER

ADD PERSON

If you have **more than one folder** in your loop, you will see the **Autofill Settings** section in **View Details**. This allows you to dictate which folder's documents may update **View Details** with new information should the documents be modified at any time. Let's take a minute to discuss how **View Details** and **Interactive Templates** communicate with each other.

View Details to Interactive Templates:

View Details will auto-fill information into an **Interactive Template** up to the point that you click save while viewing that template. After clicking save, the template no longer auto-accepts new information from **View Details**. If you forget to add your client's name or their role, which is required to auto-fill their name into the correct text fields in the template, you can still back out of the template without saving in order to make the necessary adjustments to **View Details**.


Interactive Templates to View Details:

An update you make directly to **Interactive Templates** will talk back to the **View Details** page, keeping it current with all new information. This way, when you add any new **Interactive Templates**, they will receive the latest information. Previously saved templates, however, will not be updated with this new information. Why not? Well, when you understand that dotloop's Version-NOW document technology clears any signatures on a document when a change is made, you can imagine the consequences of allowing the **View Details** page to make these changes for you throughout your loop.

adding people to a loop:

People


Invite your clients, vendors and even those on the other side of the negotiation! No one can see who you invite.



Admin for Success Management Bro...

ON MY TEAM

ADMIN ▾



Lizzie Looper (you)

cmargraf@dotloop.com

LISTING AGENT ▾

To add a person to a loop, click **Add Person**.

Add person

Anyone you add won't see anything until you share something. Only name and role are required.

FULL NAME

ADD FULL NAME

☐ Add to my team

EMAIL

ADD EMAIL

ROLE

ROLE ▾

☐ Send intro email

Dotloop respects your privacy. [Privacy Policy](#)

ADD PERSON

The only necessary information to add a person to a loop is their *full name*, however if you intended on sharing documents to them for signatures, they will also need to be entered with an *email address*. Once provide that information and assign that person a role, this window expands to gather more information, but the rest is optional.

Add person

Anyone you add won't see anything until you share something. Only name and role are required.

FULL NAME

ADD FULL NAME

☐ Add to my team

EMAIL

ADD EMAIL

ROLE

BUYER ▾

PHONE

OPTIONAL

COMPANY NAME

OPTIONAL

COUNTRY

USA ▾

STREET NUMBER

OPTIONAL

STREET NAME

OPTIONAL

UNIT NUMBER

OPTIONAL

CITY

OPTIONAL

STATE/PROV

SELECT ▾

ZIP/POSTAL CODE

OPTIONAL

CELL PHONE

OPTIONAL

MARITAL STATUS

OPTIONAL

☐ Send intro email

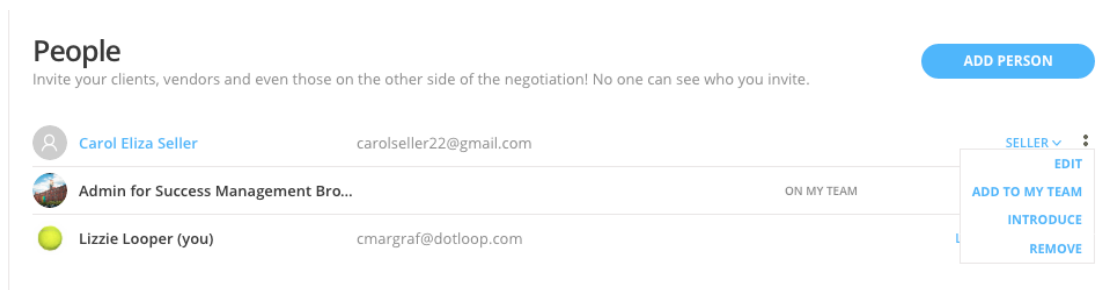
Dotloop respects your privacy. [Privacy Policy](#)

ADD PERSON

Remember the more information I store in this window, the more will save to my contact page.

In the screenshot above, if you click **Add to my team**, that person will have immediate access to everything in the loop on an ongoing basis. You should only add someone to your team if they are on the same side of the transaction and also in real estate, such as a co-listing agent. **This cannot be undone**, so make sure this person should have the same access to the loop as you!

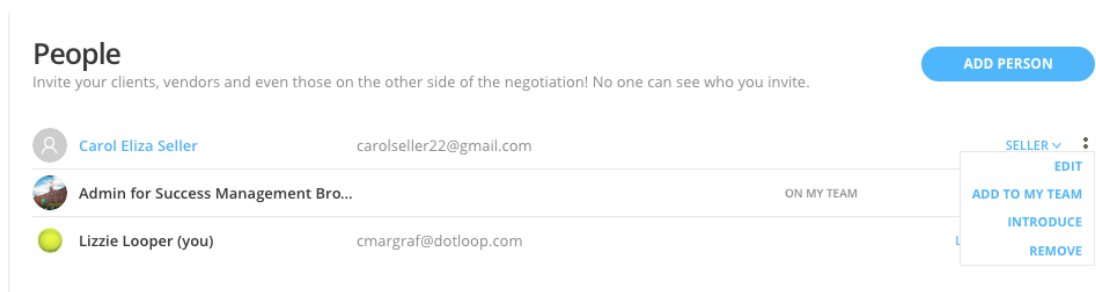
Simply click on **Add Person** to add them to the loop.



If you need to edit a person's name or email, click the 3 vertical dots for that person. In this dropdown you will also see a feature called **introduce**. Let's take a look at this feature.

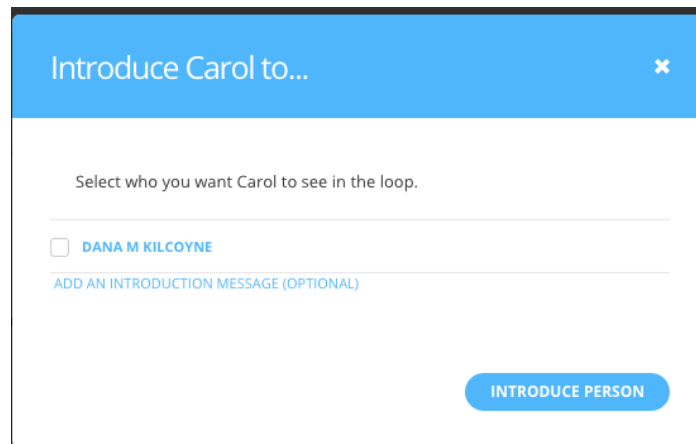
introduce people:

As a rule, the people you add to a loop will not be able to communicate or collaborate with the other people added. Similarly, if someone you've added to a loop adds someone into their view of the loop, you will not be able to collaborate with their person. Think about inviting in the other agent - you wouldn't want that other agent having an open line of communication directly to your client, right? Here's an example of when you might use the introduce feature:



Carol is your buyer who has not picked a house yet and does not know what she can afford. You, the ever resourceful agent, add Dana (the trusted loan officer) to the loop. At this point, Carol and Dana cannot see each other when they log in to their view of the loop. Let's introduce the two so that they

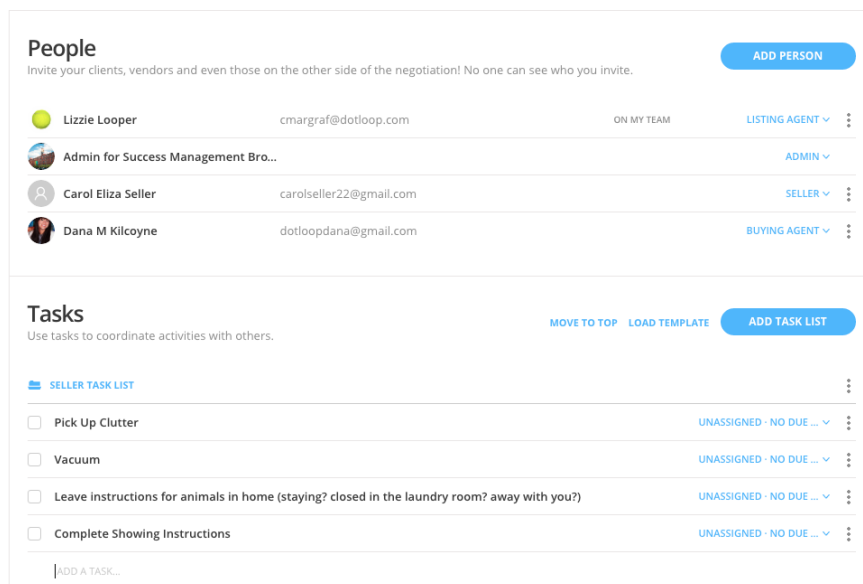
can upload, share and collaborate on the required mortgage documents. Click the dropdown and select **Introduce**.

A modal dialog box titled "Introduce Carol to..." with a close button (X) in the top right corner. The main text says "Select who you want Carol to see in the loop." Below this is a list of people with checkboxes. The first person is "DANA M KILCOYNE" with an unchecked checkbox. Below the list is a link "ADD AN INTRODUCTION MESSAGE (OPTIONAL)". At the bottom right is a blue button labeled "INTRODUCE PERSON".

Introduce Carol to...	
Select who you want Carol to see in the loop.	
<input type="checkbox"/>	DANA M KILCOYNE
ADD AN INTRODUCTION MESSAGE (OPTIONAL)	
<button>INTRODUCE PERSON</button>	

Check the box next to your client and click **Introduce Person**.

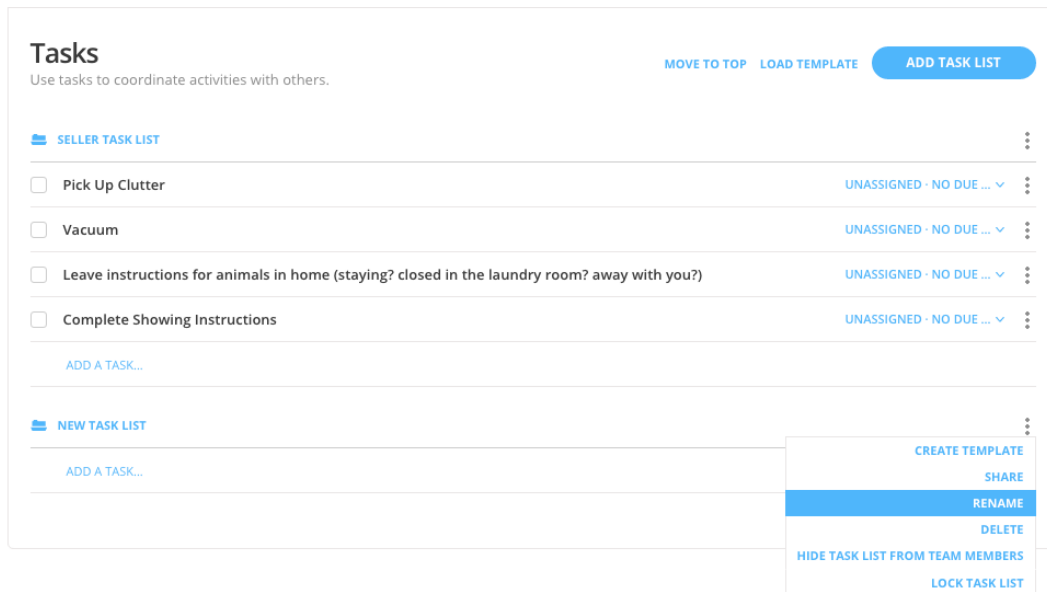
adding task lists:

The interface is divided into two main sections: "People" and "Tasks". The "People" section has a subtitle "Invite your clients, vendors and even those on the other side of the negotiation! No one can see who you invite." and an "ADD PERSON" button. It lists four people: Lizzie Looper (cmargraf@dotloop.com, ON MY TEAM, LISTING AGENT), Admin for Success Management Bro... (ADMIN), Carol Eliza Seller (carolseller22@gmail.com, SELLER), and Dana M Kilcoyne (dotloopdana@gmail.com, BUYING AGENT). The "Tasks" section has a subtitle "Use tasks to coordinate activities with others." and buttons for "MOVE TO TOP", "LOAD TEMPLATE", and "ADD TASK LIST". It shows a "SELLER TASK LIST" with four tasks: "Pick Up Clutter", "Vacuum", "Leave instructions for animals in home (staying? closed in the laundry room? away with you?)", and "Complete Showing Instructions". Each task has a checkbox and a status "UNASSIGNED - NO DUE ...". At the bottom is an "ADD A TASK..." input field.

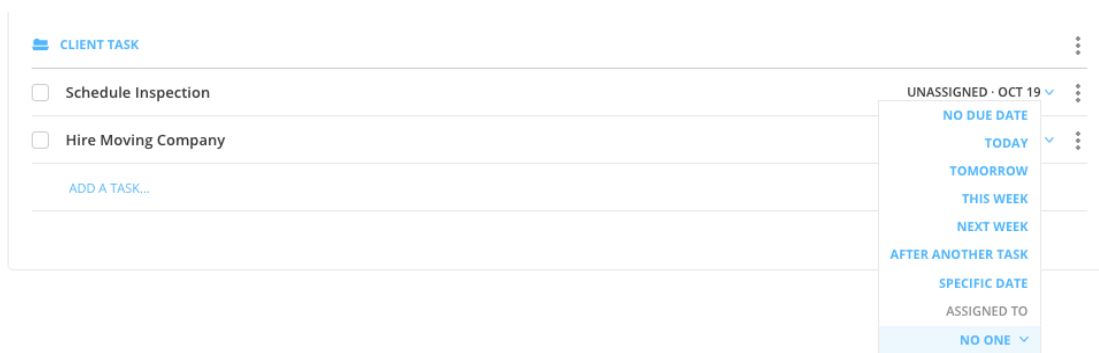
People	
Invite your clients, vendors and even those on the other side of the negotiation! No one can see who you invite.	
<button>ADD PERSON</button>	
	Lizzie Looper cmargraf@dotloop.com ON MY TEAM LISTING AGENT
	Admin for Success Management Bro... ADMIN
	Carol Eliza Seller carolseller22@gmail.com SELLER
	Dana M Kilcoyne dotloopdana@gmail.com BUYING AGENT

Tasks	
Use tasks to coordinate activities with others.	
<button>MOVE TO TOP</button> <button>LOAD TEMPLATE</button> <button>ADD TASK LIST</button>	
SELLER TASK LIST	
<input type="checkbox"/>	Pick Up Clutter UNASSIGNED - NO DUE ...
<input type="checkbox"/>	Vacuum UNASSIGNED - NO DUE ...
<input type="checkbox"/>	Leave instructions for animals in home (staying? closed in the laundry room? away with you?) UNASSIGNED - NO DUE ...
<input type="checkbox"/>	Complete Showing Instructions UNASSIGNED - NO DUE ...
<input type="text" value="ADD A TASK..."/>	

To add a new task list to a loop, you have a few options! If you are loading in a template created by the office admins, you'll select *load template*. If you are looking to create your own task list in this loop, simply click on **Add Task List**. Clicking *Move to top* will place your entire task section at the top of your loop, above the documents section. Let's click **Add task list**.



As you can see, we are going to rename the task list to **Client Tasks** by clicking on the 3 vertical dots and choosing to *rename* the list. You can also delete a task list or hide the task list from the drop down. If you hide a task list, it will not be visible to your admins.



Once you've built your list, you'll want to click on **Unassigned** and choose to assign it to the correct person within the loop and the appropriate due date for the task. Assigning the task to a person and a due date will trigger an email reminder to that person as well as provide them with a copy of their assigned tasks within their loop.

working with documents within the loop:

type:

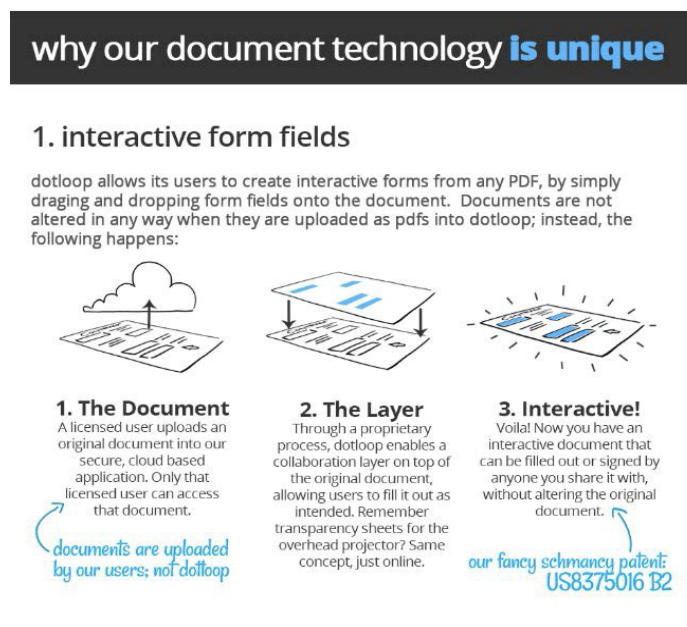
There are two types of documents on dotloop, PDFs and Interactive Documents. The adding and editing of documents are found in the advanced section.

- PDFs: Forms you bring into dotloop that are not interactive and have most likely been completed by hand. These forms are not going to autofill, but you can place any interactive fields on them you may need.
- Interactive Documents: Forms that are housed in dotloop which are typically provided by your company or association. They are interactive, meaning they're prepared for autofill and are ready for e-signatures.

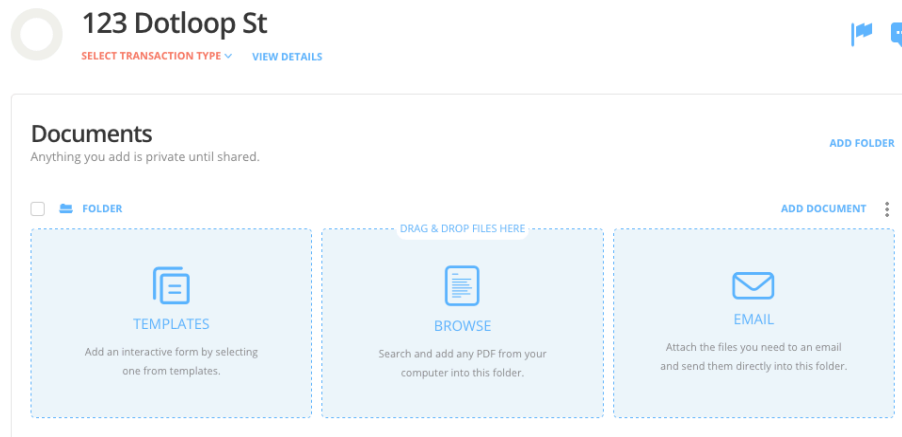
version-NOW:

Both interactive and PDF documents on dotloop are equipped with Version-NOW technology, dotloop's patented document technology. It means that when you open up a document in dotloop, you are always looking at the most current revision of that document.

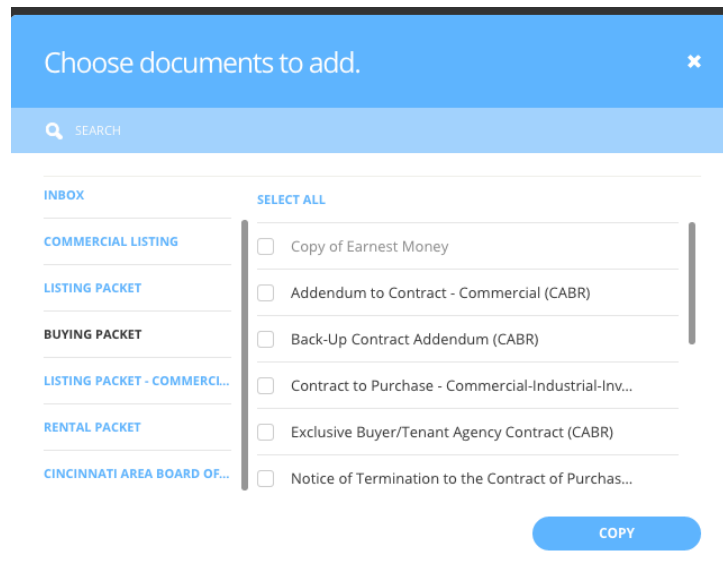
It also means that your contract terms are secure. No changes can be made to a document without all previous signatures being erased. Any time you do make a change, a copy of the previous version is a conveniently filed away behind the scenes and is easily viewable and/or printable at any time.



adding interactive forms:



In order to add your interactive documents, select **Add Document** to the right of whichever folder you in the forms to be located in. Then, choose to add from **Templates**.



While selecting from your templates, you may see that your office has created document sets for you. You can click each folder on the left in order to see the templates that are available for you to choose from. Notice that there is always a search bar to help you quickly find any template. Also notice that there is a *Select all* button. It may be easier to select all of the documents in a set and then deselect the few that you do not need.

Documents

ARCHIVE
MAKE A COPY
OPEN
PRINT
DOWNLOAD
FAX
SHARE

Anything you add is private until shared.

NOT SUBMITTED
☒
FOLDER
ADD DOCUMENT

OPTIONAL	<input checked="" type="checkbox"/> Addendum to Contract - Commercial (CABR)	NOT SHARED	1		
OPTIONAL	<input checked="" type="checkbox"/> OH - Contract to Purchase (CABR)	NOT SHARED	1		

After your documents have been added to the loop, you can either open one at a time by clicking directly on the name of the document. You can also open multiple documents at once by placing a check to the box to the left of the documents and then choosing **Open** from the options that appear towards the top right.

Autofill

To save time, tell us a few things so we can fill them in for you. All fields are optional

ROLES

Buyer 1

CAROL BUYER

Buyer 2

SELECT PERSON

Seller 1

SELECT PERSON

Seller 2

SELECT PERSON

Buying Agent 1

SELECT PERSON

Listing Agent 1

SELECT PERSON

Escrow/Title 1

SELECT PERSON

PROPERTY ADDRESS

You are linked to a listing.

STREET NUMBER

123

STREET NAME

Dotloop St

UNIT NUMBER

ADD UNIT NUMBER

CITY

Cincinnati

STATE/PROV

OH

ZIP/POSTAL CODE

45203

COUNTY

ADD COUNTY

FINANCIALS

PURCHASE/SALE PRICE

ADD PURCHASE/SALE PRICE

EARNEST MONEY AMOUNT

ADD EARNEST MONEY AMOUNT

EARNEST MONEY HELD BY

ADD EARNEST MONEY HELD BY

When you open up a new set of Interactive Templates, you will be directed to the Autofill window. dotloop's Interactive Templates are designed to pull the information you stored on the **View Details** page into their appropriate fields on the documents. Autofill will also assign all of the signature and initials fields to the people you've added to the loop based on their roles. Choosing to autofill does not

force you down an e-signature path. You can always download and print at any point, so we recommend clicking autofill every time.

OH - Contract to Purchase (CABR) FILE ADD AUTOFILL MORE SAVE SAVE & SHARE

Copyright August 1, 2015 Page 1 of 7

Contract to Purchase
Adopted by the
CINCINNATI AREA BOARD OF REALTORS®
DAYTON AREA BOARD OF REALTORS®
For exclusive use by REALTORS®.
This is a legally binding contract. If not understood, seek legal advice.
For real estate advice, consult a REALTOR®.

1. **PROPERTY DESCRIPTION:** I/We ("Buyer") offer to purchase from Seller ("Seller") the following described property:
2 Address 123 123 Dotloop St, Dotloop St City/Township Cincinnati
3 Ohio, Zip Code 45203, County, Further described as:
4 ("Real Estate").
5
6 2. **PRICE AND TERMS:** Buyer hereby agrees to pay \$ ("Purchase Price") for the Real Estate, payable as follows:
7 a) **EARNEST MONEY:** \$ ("Earnest Money")
8 shall be deposited with upon written acceptance of
9 this contract ("Contract"), in a trust account pending the final settlement and conveyance of the purchase and sale of the Real
10 Estate contemplated in this Contract ("Closing"), or returned to the Buyer if this offer is not accepted in writing. Any
11 disbursement of Earnest Money shall be in compliance with Ohio R.C. 4735.24. The Earnest Money shall be disbursed as
12 follows: (i) if the transaction is closed, the Earnest Money shall be applied to Purchase Price (may be retained by brokerage and
13 credited toward brokerage commission owed) or as directed by Buyer or (ii) if either party fails or refuses to perform, or if any

Once you autofill the documents you'll see those auto filled fields highlighted in a yellow background. Don't worry- that yellow will return to white once you hit save! You can click or tab through the document to fill out any remaining fields.

OH - Contract to Purchase (CABR) FILE ADD AUTOFILL MORE SAVE SAVE & SHARE

ASSIGNED TO NO ONE SERIF 11

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2 Address 123 123 Dotloop St, Dotloop St City/Township Cincinnati
3 Ohio, Zip Code 45203, County, Further described as:
4 ("Real Estate").
5
6 2. **PRICE AND TERMS:** Buyer hereby agrees to pay \$ ("Purchase Price") for the Real Estate, payable as follows:
7 a) **EARNEST MONEY:** \$ ("Earnest Money")

Anytime you click into an interactive field, a dark navy bar will appear at the top of the document. From here you can assign that field to anyone that you've added to a loop, or you can view the history of the revisions for that field. All of the other options have to do with font size, style, position, and highlighting.

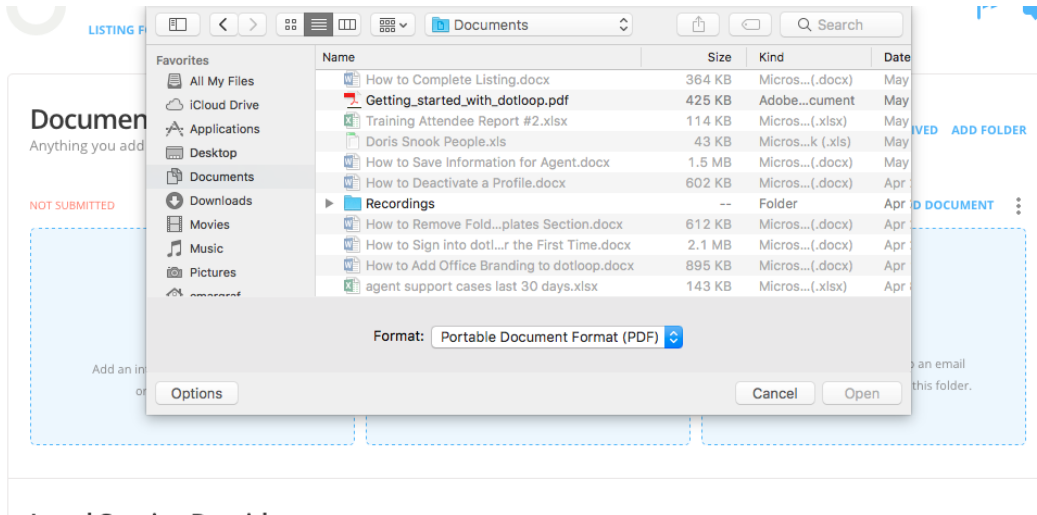
Once you are done editing your Interactive Templates, you can click **Save** in the upper right or **Save and Share** if you are ready to share all of these documents with your buyers. For our purposes here, click **Save**.

working with PDF files:

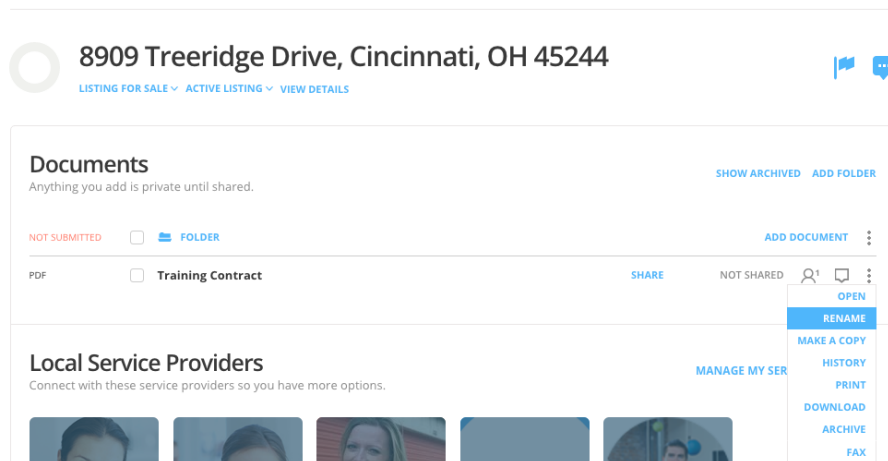
If your documents are saved to your computer, then there are multiple ways to upload those forms into dotloop!

How did the documents get onto your computer? Great question! You can scan your documents to your email and then download them to your computer, or they may exist in your email already, in which case you would download them as well.

Your first choice for uploading those forms into dotloop is to select **Browse**



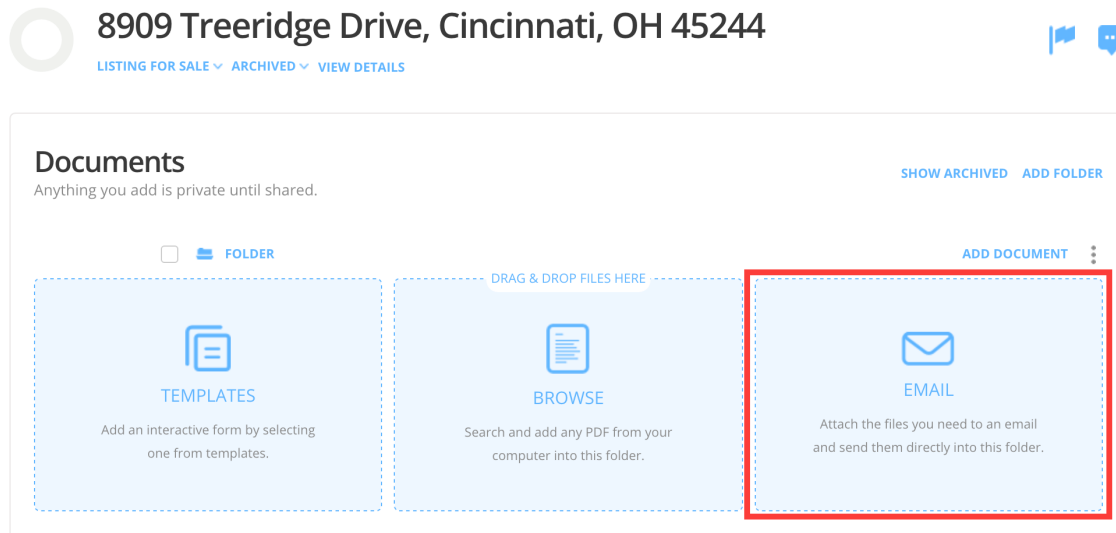
After clicking **Browse**, locate the PDF documents and click *Open*. If you are uploading multiple documents, hold 'shift' on your keyboard while you click them. Notice, this is the same process as adding an attachment to an email – it's that easy!



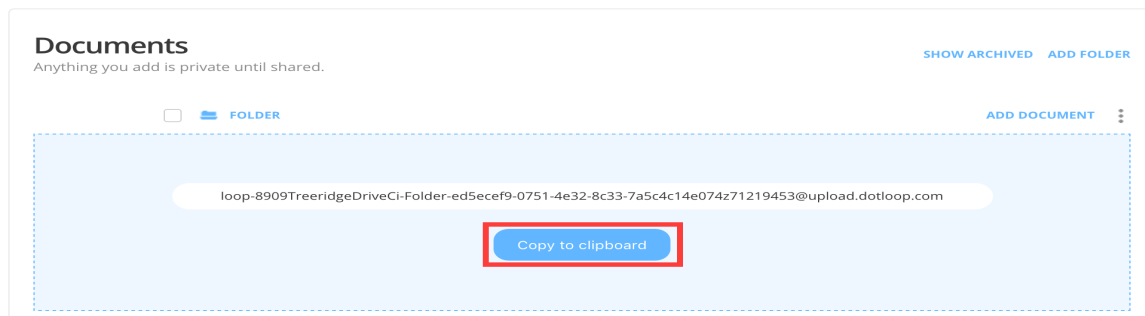
You will now see your PDFs added to the folder. If you or your office would like the folder to be renamed before it's submitted for review, you can click the 3 vertical dots to the right of the folder and select the **Rename** option. Similarly, if you need to rename a document, there are 3 vertical dots for each document on the far right.

emailing documents into a loop:

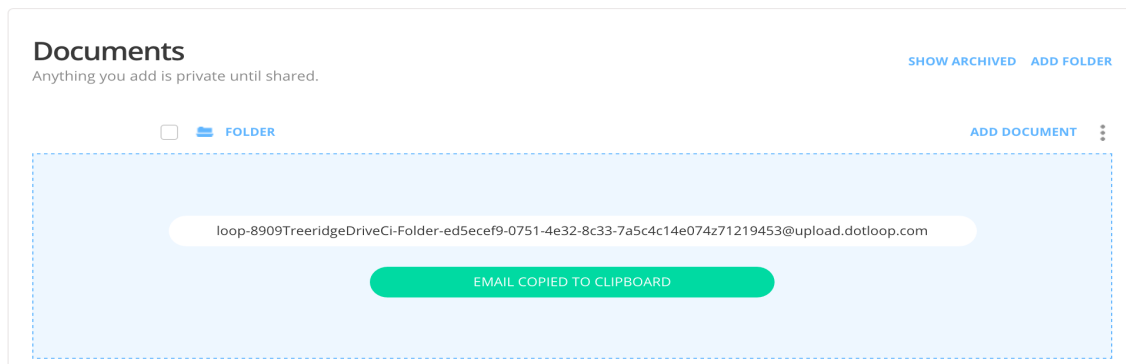
Email-in allows you to move PDFs that are attached to an email directly into dotloop.



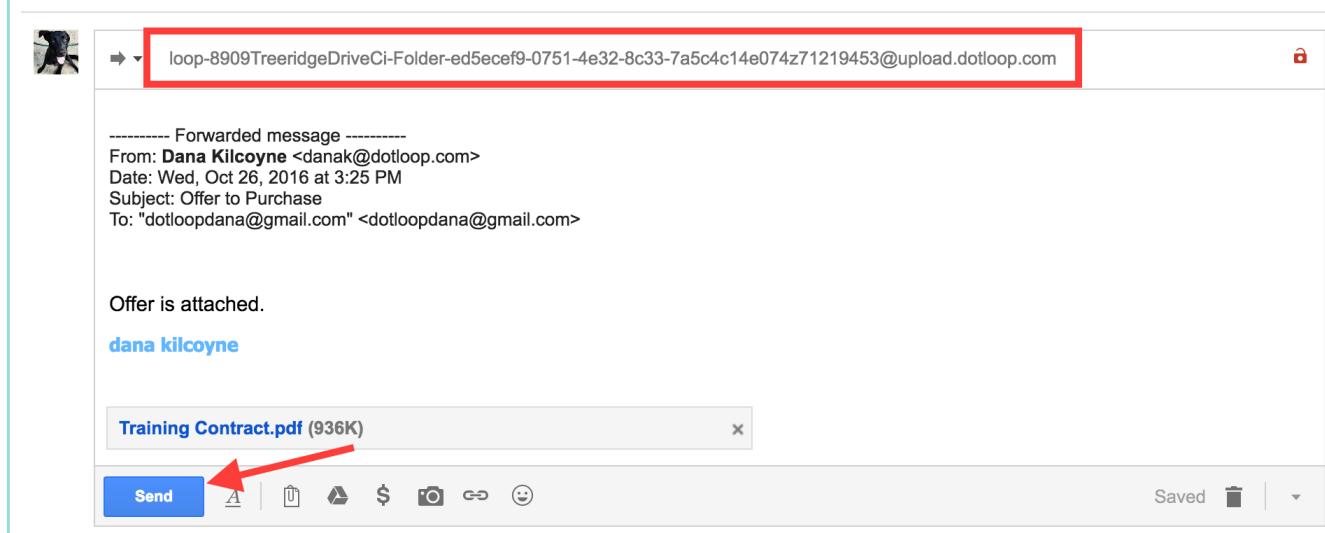
To email PDFs directly into a loop, click on **Email**.



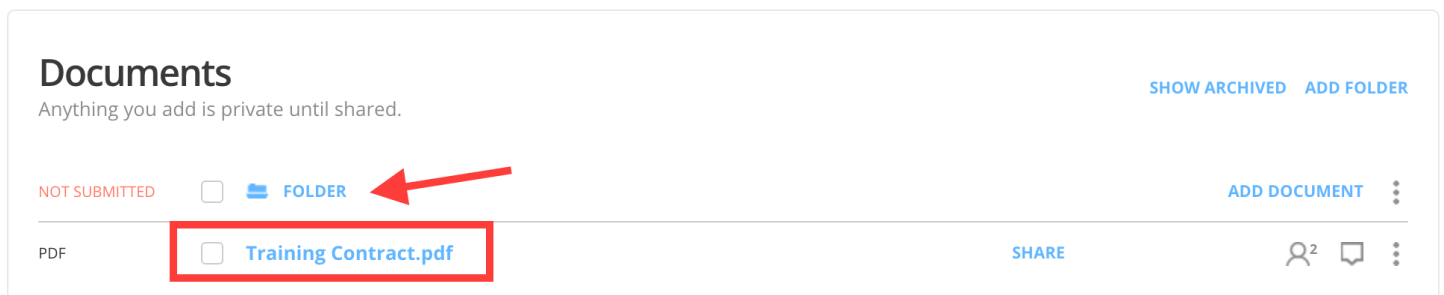
Click on **Copy to clipboard**:



The very long email upload address will be copied! You can then paste that address into the recipient section of your email.



Instead of this document going into your Inbox, this document will be found within the folder of the loop that you forwarded the email to.

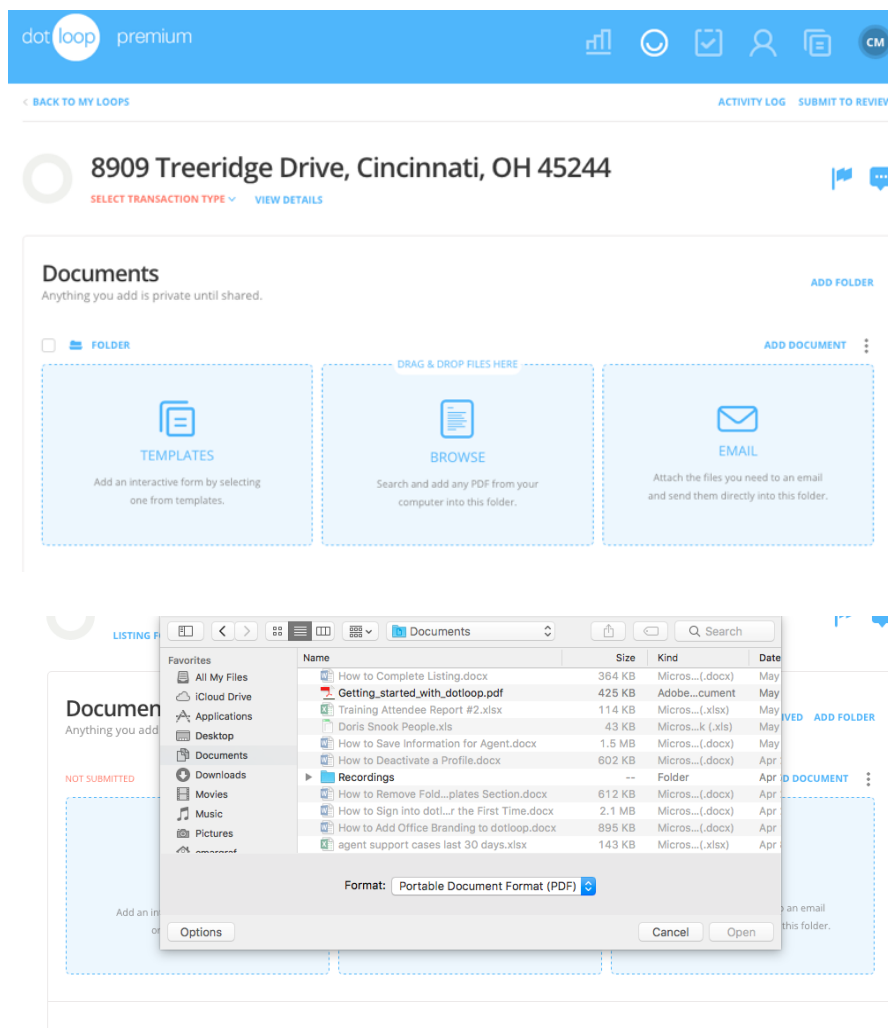


Each folder within a loop has its own specific upload email address. Go through the same steps inside of each folder to send any PDFs into that folder.

editing PDF's:

When you add a PDF to dotloop it will not be interactive and it cannot pull information from the details tab, but it does have a helpful toolbar that will allow you to drag and drop e-signatures, initials, checkboxes, and text fields.

Let's say that there is an addendum that you need to fill out that has not been added to the templates section by your brokerage. You can add this addendum as a PDF from your computer.



Click on **Add Documents** to the right of the folder and then select **Browse** in order to pull those documents into the loop from your computer. Locate the document you wish to add and then click

Open to add it to your loop.

8909 Treeridge Drive, Cincinnati, OH 45244
LISTING FOR SALE ▾ ACTIVE LISTING ▾ VIEW DETAILS

Documents
Anything you add is private until shared. [SHOW ARCHIVED](#) [ADD FOLDER](#)

NOT SUBMITTED ☐ [FOLDER](#) [ADD DOCUMENT](#) ▾

PDF ☐ **Training Contract** NOT SHARED 👤 🗨 ▾

Click on the name of the document to open it.

< **Training Contract** [EDIT IN PRIVATE](#) FILE ▾ ADD ▾ AUTOFILL MORE ▾ SAVE [SHARE](#)

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Contract to Purchase
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For real estate advice, consult a REALTOR®.

1.1.2016 (date).

1 **1. PROPERTY DESCRIPTION:** I/We ("Buyer") offer to purchase from Seller ("Seller") the following described property:
2 Address 123 dotloop Training Lane City/Township Cincinnati
3 Ohio, Zip Code 45203, County Hamilton, Further described as: _____
4 _____ ("Real Estate").

5 **2. PRICE AND TERMS:** Buyer hereby agrees to pay \$250,000
6 ("Purchase Price") for the Real Estate, payable as follows:
7 a) **EARNEST MONEY:** \$1,000 ("Earnest Money")

At the top of the document you will see your options for editing the PDF file.

< **Training Contract** [EDIT IN PRIVATE](#) FILE ▾ ADD ▾ AUTOFILL MORE ▾ SAVE [SHARE](#)

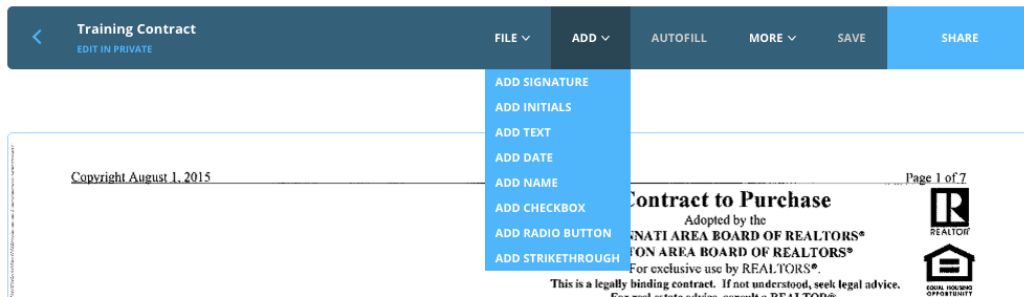
[SAVE](#)
[PRINT](#)
[DOWNLOAD](#)
[SPLIT DOCUMENT](#)
[ROTATE](#) >
[APPLY TEMPLATE](#)
[SAVE AS TEMPLATE](#)

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For real estate advice, consult a REALTOR®.

1.1.2016 (date).

In the **File** dropdown, you will see the actions you can take dealing specifically with the file such as printing or downloading. Additional helpful options include *split document* for when you upload a large file comprised of multiple smaller forms and *rotate document* for when another agent provides you with a form in landscape, or even upside down.



Once we've rotated or split our document, we'll need to prepare it for signatures and initials. This step is important, because without it our clients cannot sign on dotloop.

Let's imagine a pen and paper example. If we shared the PDF as it stands right now with *no* interactive fields on it, it is the same as if we printed the contract, handed to our client and asked them to sign without giving them a pen. Without the interactive signature and initial fields, we are providing them with no medium to sign the document.

The **Add** dropdown (see above) will give you a list of all the different types of fields you can add to the document, such as checkboxes and initial fields.

You'll notice at the bottom of page 1 we have a space for our seller's initials. You'll select *add initials* from the **Add** dropdown and then click to drop the field over the desired area on the document.



If you need to resize the initial field hover over the bottom right corner of the box to trigger the colored in triangle which will allow you to expand or shrink the box. To move the field, hover your mouse over any edge of the field to trigger the four-way arrow allowing you to pick up the box and move it across the document.

Training Contract
EDIT IN PRIVATE

FILE ADD AUTOFILL MORE SAVE SAVE & SHARE

ASSIGNED TO ANYONE X MORE...

the FHA For Your Protection. Get a Home Inspection disclosure. When the Buyer is financing through FHA or VA, the Seller may be required to pay for certain fees. Check with your lending institution. Whole house inspection fees may be paid by the VA Buyer, but must be paid outside of the Closing. On FHA/VA contracts, the appraiser is not deemed to be a whole house inspector.

☐ OTHER FINANCING: SEE ATTACHED ADDENDUM

☐ Settlement Charges: In addition to costs incurred in order for the Seller to fulfill the terms of the Contract and to provide marketable title, Seller agrees to pay actual settlement charges on behalf of the Buyer, including, but not limited to, discount points, closing costs, pre-pays and any other fees allowed by Buyer's lender in an amount not to exceed, _____.

Buyer's Initials BB Date / Time 1.1.2016 Seller's Initials INITIAL HERE Date / Time

Assign field
Sign now

123 dotloop Train

Clicking onto the box will prompt you to either *Assign Field* or *Sign Now*. In this example, this field needs to be assigned to my seller so I will select *Assign Field*.

Training Contract
EDIT IN PRIVATE

FILE ADD AUTOFILL MORE SAVE SAVE & SHARE

ASSIGNED TO ANYONE X MORE...

CAROL SELLER
CAROLINE MARGRAF
ADMIN FOR SUCCESS MANAGEMENT BR...

NO ONE
ROLE
ADD PERSON

Settlement Charges: In addition to costs incurred in order for the Seller to fulfill the terms of the Contract and to provide marketable title, Seller agrees to pay actual settlement charges on behalf of the Buyer, including, but not limited to, discount points, closing costs, pre-pays and any other fees allowed by Buyer's lender in an amount not to exceed, _____.

Buyer's Initials BB Date / Time 1.1.2016 Seller's Initials INITIAL HERE Date / Time

Assign field
Sign now

123 dotloop Train

Copyright Attorney 2015 Property Address: Page 2 of 7

This action brings me to the *Assigned to* dropdown in the upper left corner of the document. From this list, I can select whoever needs to complete the field.

Training Contract
EDIT IN PRIVATE

FILE ▾ ADD ▾ AUTOFILL MORE ▾ SAVE SAVE & SHARE

ASSIGNED TO NO ONE ▾ SERIF ▾ 9 ▾

Copyright August 1, 2015 Page 1 of 7

Contract to Purchase
Adopted by the
CINCINNATI AREA BOARD OF REALTORS®
DAYTON AREA BOARD OF REALTORS®
For exclusive use by REALTORS®.
This is a legally binding contract. If not understood, seek legal advice.
For real estate advice, consult a REALTOR®.

1.1.2016 (date).

1. **PROPERTY DESCRIPTION:** I/We ("Buyer") offer to purchase from Seller ("Seller") the following described property:
2 Address 123 dahlia Training Lane City/Township Cincinnati
3 Ohio, Zip Code 45203, County Hamilton, Further described as:
4 ("Real Estate").

2. **PRICE AND TERMS:** Buyer hereby agrees to pay \$250,000
6 ("Purchase Price") for the Real Estate, payable as follows:
7 a) **EARNEST MONEY:** \$ 1,000 ("Earnest Money")
8 shall be deposited with upon written acceptance of
9 this contract ("Contract"), in a trust account pending the final settlement and conveyance of the purchase and sale of the Real

I can also add any type of text field to the document. You can see I have placed one on line 8 in this example. Once I've placed the box, an additional menu appears in a darker navy. In this menu bar, what we refer to as the *document editor* I can select font type, size, alignment and color. I can also choose to assign the text field to my client as I did the initial field if I need them to complete the missing information.

organizing documents within your loop:

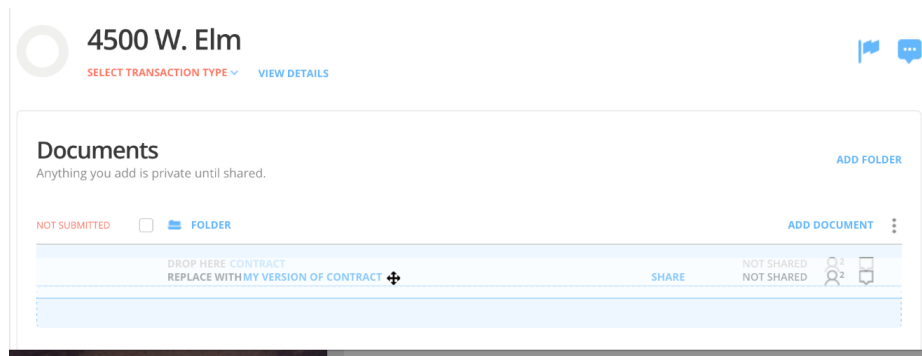
You can move a document up or down within a folder by click, holding, dragging and releasing it into place. You can also move folders above or below other folders.

4500 W. Elm
SELECT TRANSACTION TYPE ▾ VIEW DETAILS

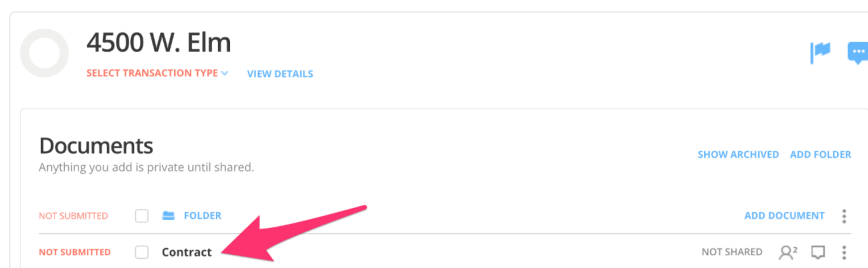
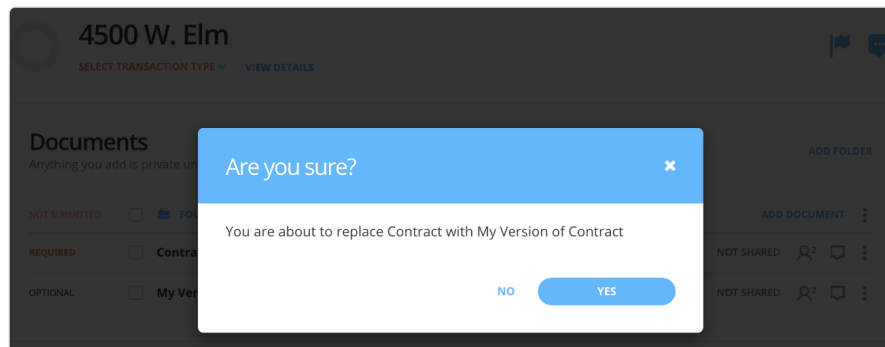
Documents
Anything you add is private until shared. ADD FOLDER

NOT SUBMITTED	<input type="checkbox"/> FOLDER	ADD DOCUMENT
REQUIRED	<input type="checkbox"/> Contract	NOT SHARED 2
OPTIONAL	<input type="checkbox"/> My Version of Contract	NOT SHARED 2

You can also replace documents in a loop with an updated version by clicking, holding and dragging the new document onto the old document you want to replace.



Above, we can see I replaced the *REQUIRED* version of the Contract (which was pulled from my Templates) with "My Version of Contract." You will be prompted to accept this replacement.



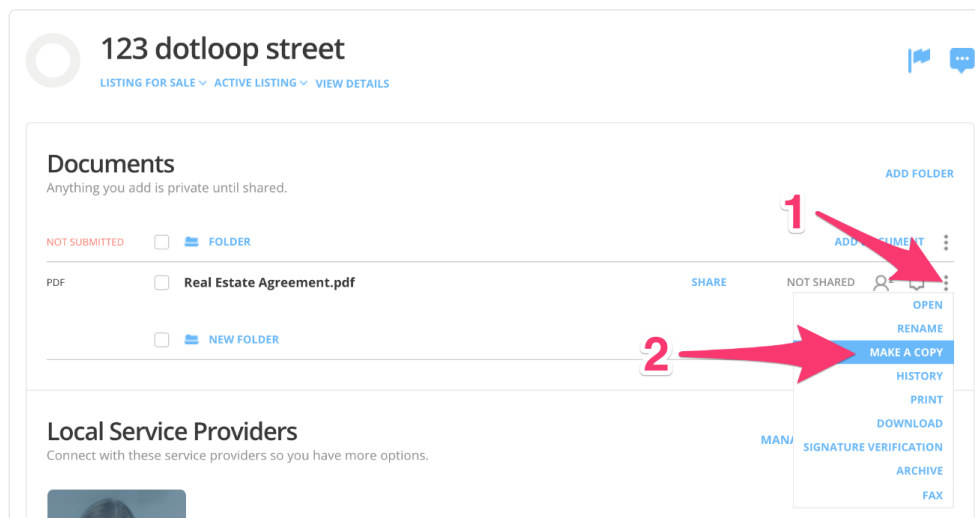
You can see just above, my contract's title has now changed to the title of the contract I replaced. Notice that the document's status has changed from *REQUIRED* to *NOT SUBMITTED*, because replacing counts as an update to a *REQUIRED* document.

Use this on placeholders and documents as necessary.

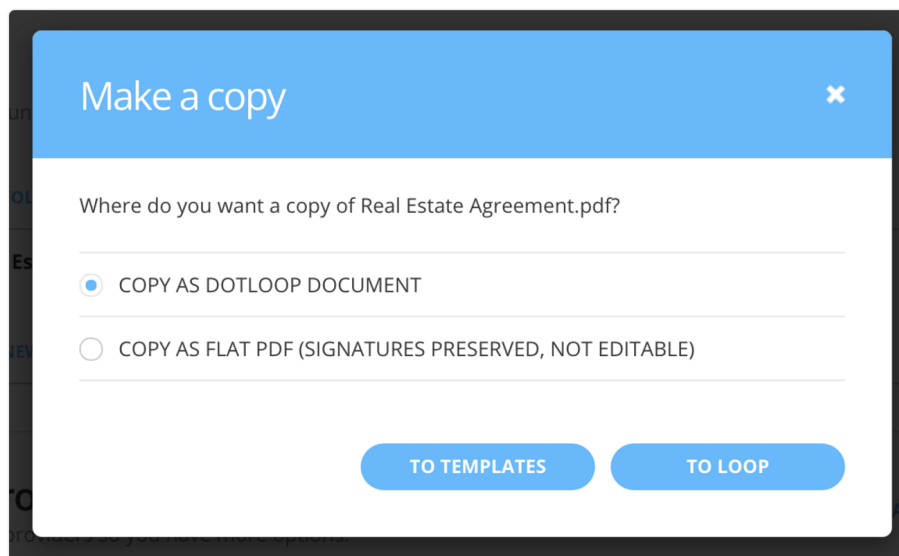
make a copy:

To move a document from one folder to another, you'll need to use our *Make a Copy* feature. From the documents section of your loop, click on the three vertical dots at the far right to access the

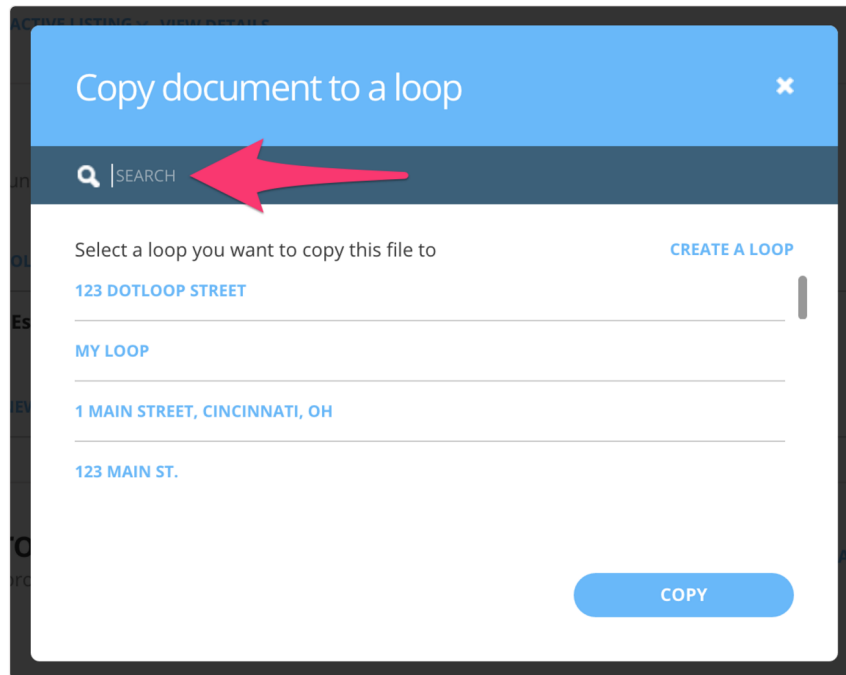
document options and select 'Make A Copy'.



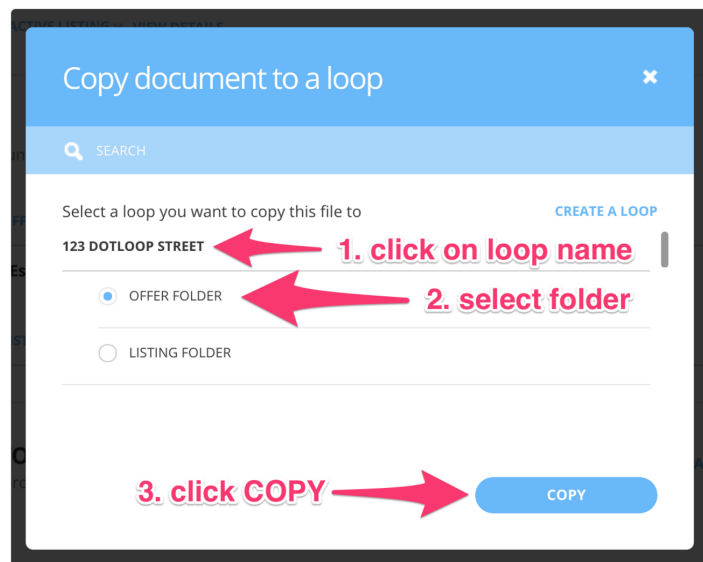
After clicking *Make A Copy* you will have the option to copy the document as an interactive form or a flat PDF with no interactive fields. A dotloop document is an exact copy of the document that will retain all of its information, signed fields, and interactive fields. A flat PDF is taking all the information on the document and flattening it permanently on the document, almost like printing or scanning the document.



We will now be taken to the next screen where we can search for the loop we wish to copy the document to. You have the option to either browse through your loops or to utilize the search bar at the top to narrow your results.



You'll select the loop that you're currently working in to move the document from one folder to another. If you needed to move a document from one loop to another you would use this method as well!



Once we have selected our loop we can now see the folders within it. Select your folder and hit Copy and you will have successfully copied the document!



8909 Treeridge Drive, Cincinnati, OH 45244

[LISTING FOR SALE](#) [ACTIVE LISTING](#) [VIEW DETAILS](#)



Documents

Anything you add is private until shared.

[SHOW ARCHIVED](#) [ADD FOLDER](#)

NOT SUBMITTED

☐

FOLDER

[ADD DOCUMENT](#)

OPTIONAL	<input type="checkbox"/>	Exclusive Right to Sell Listing Contract (CA...	SHARE	NOT SHARED			
OPTIONAL	<input type="checkbox"/>	Non-Disclosure and Confidentiality Agree...					
OPTIONAL	<input type="checkbox"/>	Schedule I - Exclusive Right to Sell or Lease ...					
OPTIONAL	<input type="checkbox"/>	Notice From Buyer's Broker to Seller of a Li...					
NOT SUBMITTED	<input type="checkbox"/>	Training Contract					

OPEN

RENAME

MAKE A COPY

HISTORY

PRINT

DOWNLOAD

SIGNATURE VERIFICATION

ARCHIVE

FAX

Also in the dropdown is an *Archive* option. If a document is ever added by accident or if a document is ever taken out dotloop, revised and uploaded again, you will want to archive it. The document will move to the bottom of the folder and next time you view the loop or refresh your page it will be gone. In dotloop, archive is your reversible delete option.

Documents

Anything you add is private until shared.

[HIDE ARCHIVED](#) [ADD FOLDER](#)

NOT SUBMITTED

☐

FOLDER

[ADD DOCUMENT](#)

OPTIONAL	<input type="checkbox"/>	Exclusive Right to Sell Listing Contract (CA...	NOT SHARED			
OPTIONAL	<input type="checkbox"/>	Notice From Buyer's Broker to Seller of a Li...	NOT SHARED			
NOT SUBMITTED	<input type="checkbox"/>	Training Contract	SIGNED			
OPTIONAL	<input type="checkbox"/>	Non-Disclosure and Confidentiality Agree...	NOT SHARED			
OPTIONAL	<input type="checkbox"/>	Schedule I - Exclusive Right to Sell or Lease Lis...	NOT SHARED			

LISTING APPROVED

☐

FOLDER

[ADD DOCUMENT](#)

APPROVED	<input type="checkbox"/>	Training Contract	NOT SHARED			
OPTIONAL	<input type="checkbox"/>	OH - Contract to Purchase (CABR)	NOT SHARED			

If you ever need to un-archive a document, click *Show Archived* to the left of *Add Folder* and then click UNARCHIVE from that specific document's dropdown.

revision history:

Anytime a change is made to a document on dotloop it will create a new version. The entire change lifecycle can be viewed. The document's history can be pulled from 2 places:

Documents
Anything you add is private until shared. [SHOW ARCHIVED](#) [ADD FOLDER](#)

[ADD DOCUMENT](#)

NOT SUBMITTED	<input type="checkbox"/>	FOLDER	
OPTIONAL	<input type="checkbox"/>	Exclusive Right to Sell Listing Contract (CA...	NOT SHARED
OPTIONAL	<input type="checkbox"/>	Notice From Buyer's Broker to Seller of a Li...	NOT SHARED
NOT SUBMITTED	<input type="checkbox"/>	Training Contract	SHARE SIGNED

Local Service Providers
Connect with these service providers so you have more options.

UTILITIES
 MORTGAGE
 MOVING & STORAGE
 HOME WARRANTY
 ESCROW/TITLE

[OPEN](#)
[RENAME](#)
[MAKE A COPY](#)
[HISTORY](#)
[PRINT](#)
[DOWNLOAD](#)
[SIGNATURE VERIFICATION](#)
[ARCHIVE](#)
[FAX](#)

To view the document from the main page of the loop, click on the 3 vertical dots to the right of the document.

Training Contract
EDIT IN PRIVATE

FILE ▾ ADD ▾ AUTOFILL MORE ▾ SAVE SHARE

MESSAGES
SHOW TASKS
DOCUMENT HISTORY
HOST IN PERSON SIGNING

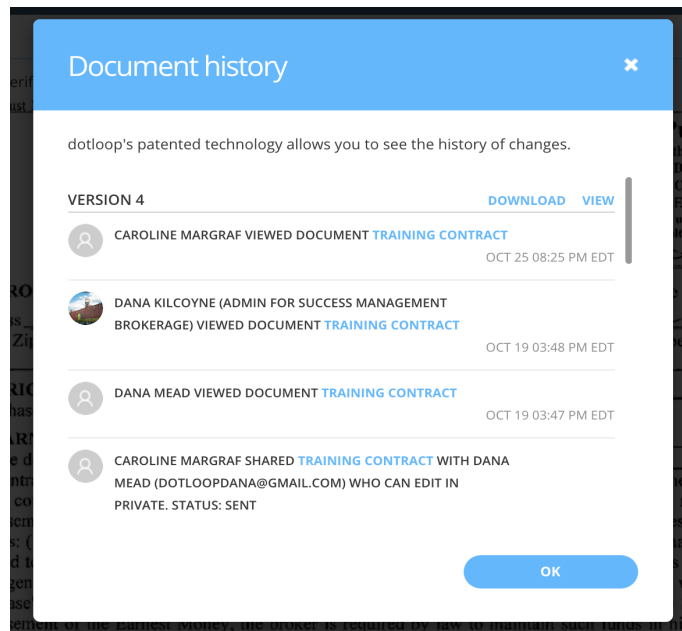
dotloop signature verification: dotloop.com/my/verification/DL-195606276-4-2Y2B
Copyright August 1, 2015

Page 1 of 7

Contract to Purchase
Adopted by the
CINCINNATI AREA BOARD OF REALTORS®
DAYTON AREA BOARD OF REALTORS®
For exclusive use by REALTORS®.
This is a legally binding contract. If not understood, seek legal advice.
For real estate advice, consult a REALTOR®.

1.1.2016 (date).

To view the history within the document, click **More** and then *Document History* from the drop down.



From the document history, you can view or download any previous revision. If you ever accidentally clear signature from a document, don't worry! Just go to your revision history, download the previous revision and add it to the loop. Remember to archive the other copy of the document so that your admins can quickly identify the correct one while reviewing.




On Interactive Document, you have the added benefit of seeing the edits that were made to specific fields. Click in any field and then select *Field History*.

Field history

Here is the audit history of this field.

Oct 18 2016 4:24 PM EDT



10/18/16
04:24pm EDT
dotloop verified

Anonymous

Oct 18 2016 3:59 PM EDT

Field added

Caroline Margraf

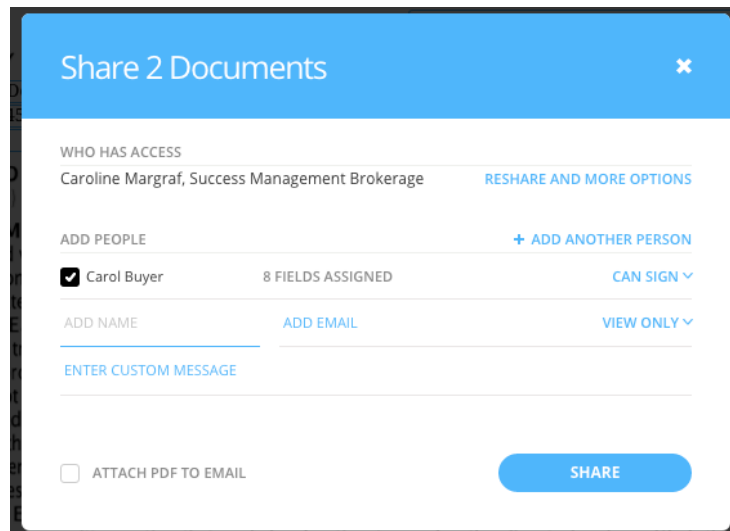
CLOSE

All changes are date and time stamped in the field history.

sharing documents:

When you're ready to obtain signatures from your clients, or send an offer over to the buying agent, you'll want to share the document! There are multiple places from where you share the document.

You can use the big share button located within the document, or you can share from your main loop page where you see the list of documents. Simply check mark the documents you're looking to share and use the large blue share button to send those documents.



On the share screen, check the people who you would like to share these documents with, choose the appropriate document privileges, add a custom email message if you would like, and then click **Share**. In the screenshot above we have left the document privilege set to *Can sign* because we only need our clients to e-sign. The available document permissions are:

View only – This privilege is given to any third party that needs to be able to view/print the document.

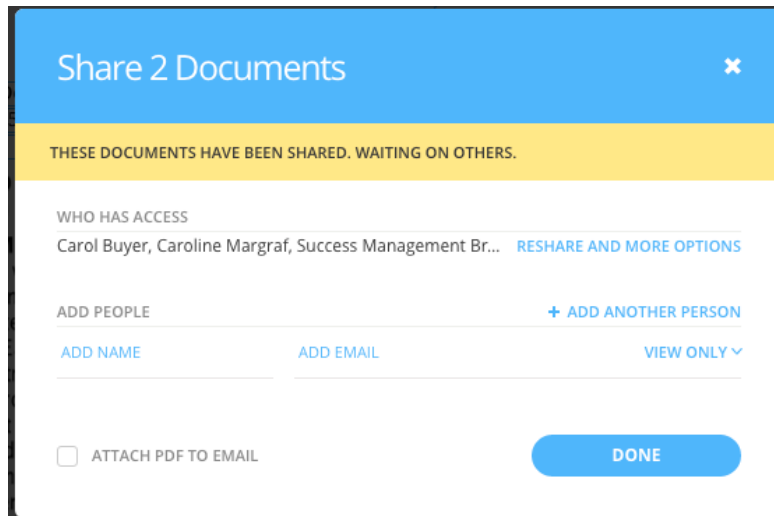
Can sign – This privilege is given to clients who only need to e-sign documents. Once the clients sign, a copy of the signed document will be shared back to you automatically.

Can fill and sign – This privilege is also given to clients. It is used when a client needs to fill out and e-sign a document. Once the client is done with the documents, a copy will be shared back with you automatically.

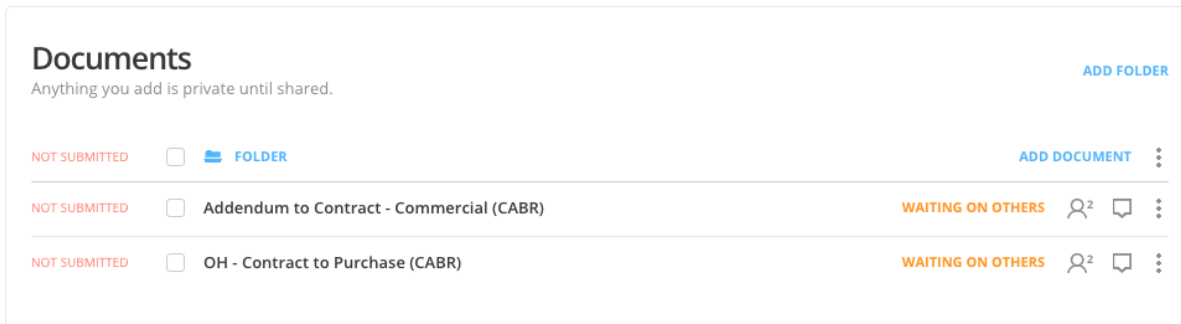
Can edit in private – This privilege is given to co-op agents that you would like to collaborate with. It will allow the other agent to assign signature fields to their clients and make changes to

the documents in private. You will not get a copy of the changes until the other agent shares the documents back with you but you will retain a copy of the version that you last shared with the co-op agent.

Pro tip: You can also attach a PDF to the share document email which is very helpful when your clients are not comfortable signing digitally, or if the other agent is not tech savvy or unfamiliar with dotloop.

A screenshot of a 'Share 2 Documents' dialog box. The title bar is blue with the text 'Share 2 Documents' and a close button. Below the title bar is a yellow banner that says 'THESE DOCUMENTS HAVE BEEN SHARED. WAITING ON OTHERS.' The main content area is white and contains the following sections: 'WHO HAS ACCESS' with a list of names and a 'RESHARE AND MORE OPTIONS' link; 'ADD PEOPLE' with a '+ ADD ANOTHER PERSON' link; 'ADD NAME' and 'ADD EMAIL' input fields; a 'VIEW ONLY' dropdown menu; an 'ATTACH PDF TO EMAIL' checkbox; and a blue 'DONE' button.

After you click **Share**, your share screen will become a confirmation screen, showing you that Carol now has access to the documents. This means your client has received a separate email that they can access at any time to e-sign from anywhere. Click **Done**.

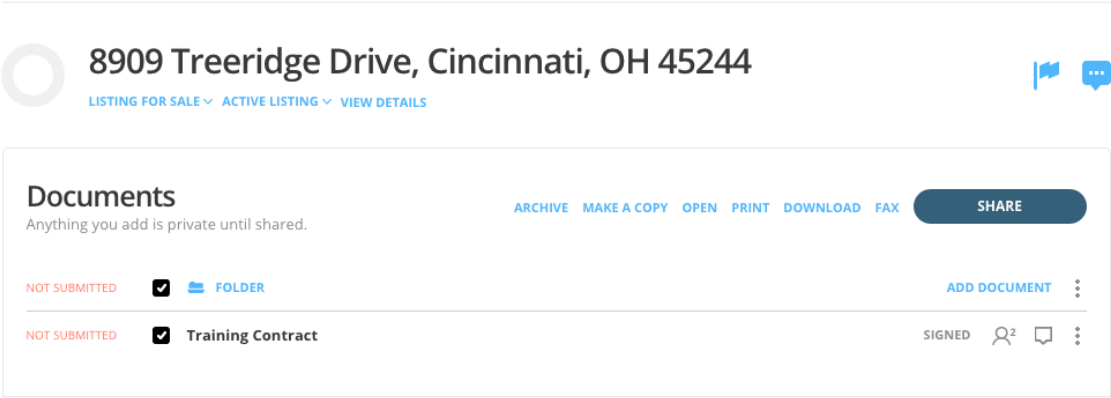
A screenshot of the 'Documents' list in dotloop. The title 'Documents' is at the top left, with a subtitle 'Anything you add is private until shared.' and an 'ADD FOLDER' link at the top right. Below the title is a table with three rows. Each row has a 'NOT SUBMITTED' status, a checkbox, a document name, a 'WAITING ON OTHERS' status, and icons for sharing and commenting. The first row is for a 'FOLDER', the second for 'Addendum to Contract - Commercial (CABR)', and the third for 'OH - Contract to Purchase (CABR)'. There is also an 'ADD DOCUMENT' link at the top right of the table.

You can see that both of your documents have been shared and are now *Waiting on Others*. Before we show you how Carol signs, let's show you what you can do with PDFs in dotloop.

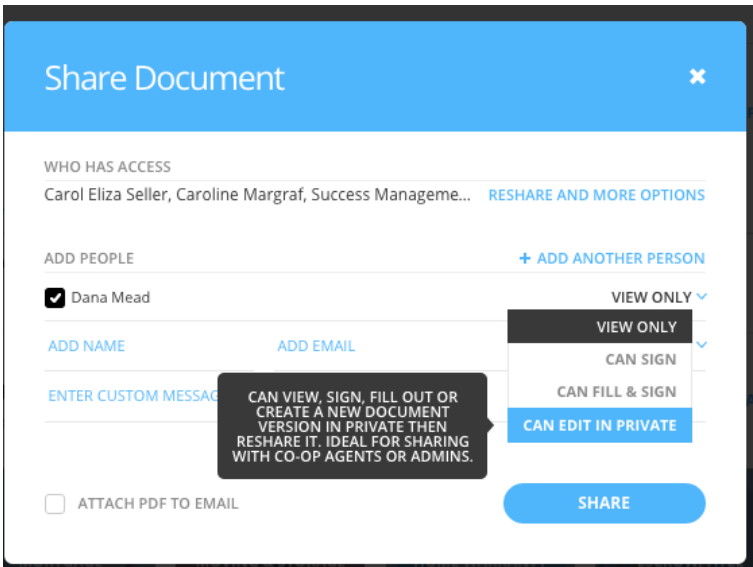
sharing with the other agent:

Now that you have a signed contract from your clients, you're ready to share it with the co-op agent. Of course, you could always hop off here. If the other agent is specifically requesting a PDF attachment or fax, there is a download option in the document dropdown. Or, review the premium upgrade section of this manual to see how you can fax and/or send a PDF attachment directly from dotloop.

For now, let's keep it in the loop and continue by sharing with the co-op agent.



To share with the other agent, check the box next to the document you would like send and then click **Share**. If you need to share multiple documents, you can check more than one.



If you have already added the other agent to the *People* section of the loop, then all you need to do is check her name, set the privileges she has to this document, enter an optional custom message, and

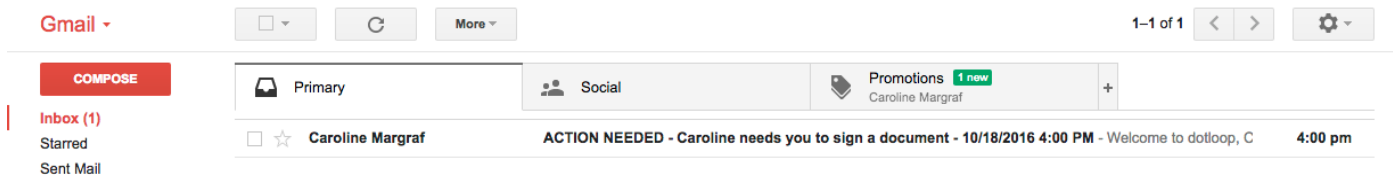
click Share. If you have not added the listing agent yet, you can add them from the share screen above.

*We are giving the other agent **Can edit in private** privileges. This will allow the other agent to counter or make changes to the contract and invite in their client for e-signatures. You will not see any changes until the document is shared back by the other agent.*

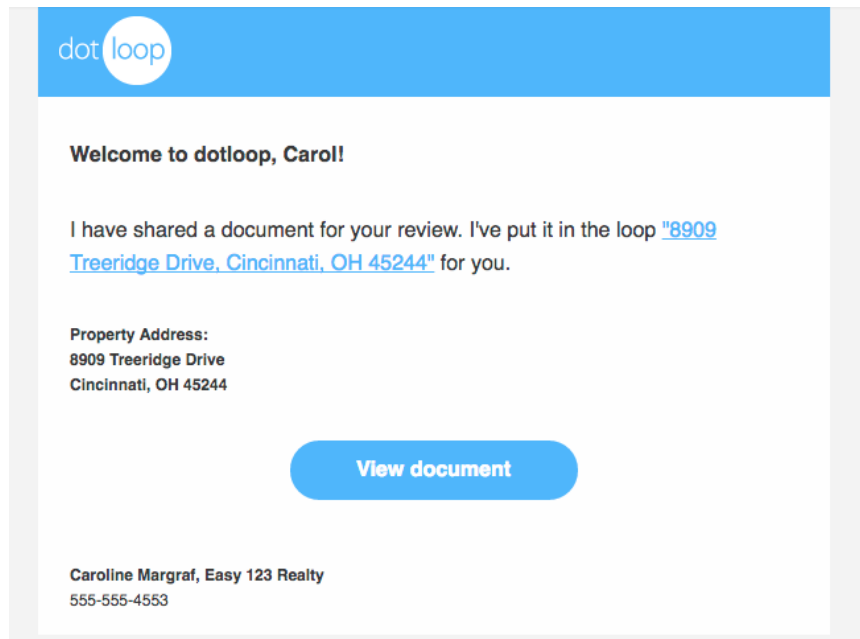
Any changes made by the listing agent will create a new version of the document, clearing any previous signatures immediately. Those changes will be highlighted for you once the document is shared back.

client signing experience:

Understanding how your clients sign is helpful to know what they will expect. This is the process that initiates after you have hit the share button and the document is waiting on others.



After you share your documents, Carol will both receive an email with a link to e-sign the documents. Let's see what Carol experiences while signing. Carol is on her laptop enjoying a Friday morning espresso on her sundeck. She chose you because you're tech-forward and flexible, which means she doesn't have to drive across town to drop off documents or find a scanner. All she has to do is open up her email. Life is good.



Carol receives this email regarding the documents you've shared to her. It informs her of the property address, any custom message you choose to include as well as your name, company and phone number in the signature of the email. You can also choose to include your license number and any tagline you use in this email signature. Once she's read all of the information in the email, she's ready to start signing by clicking on **View Document**. This opens the document(s) in a new tab where she can review them.

Carol can read through the documents as necessary and when she's ready, she will click **Start Signing** in the top right corner. This button is flashing to really catch her attention!

Once she clicks **Start Signing**, Carol will be directed to the field that requires her attention. She will also notice a few things in the menu bar at the top. In the upper left corner, she will see a fraction of fields completed which will update as she moves through the forms. In the top right corner, she has an option labeled **I'm Done**. Think of **I'm Done** the same way you think of saving. Selecting this allows Carol to save any updates she's made to the document and return to it later for completion.

To sign the first field dotloop has directed to, Carol simply needs to click in the orange box labeled **Click Here**.

Adopt your signature

CONFIRM YOUR NAME

INITIALS

Carol Eliza Seller

CES

Carol Eliza Seller

SIGNATURE PREVIEW

CES

INITIALS PREVIEW

By clicking adopt, I have read and understand dotloop's [ESIGN Consumer Consent Disclosures](#) and [Terms of Use](#). I agree my electronic signature and initials shall have the same force and effect as my written signature or initial.

DRAW SIGNATURE

ADOPT AND SIGN

A window will appear asking her to confirm how she wants her signature to appear. This is also her opportunity to make any edits to her signature by clicking onto the line where her name appears in a standard font. The changes she makes to this line will apply then to the script font below. She can also choose to draw her signature.

Adopt your signature

Draw your signature:

Draw your initials:

Carol Seller

CS

By clicking adopt, I have read and understand dotloop's [ESIGN Consumer Consent Disclosures](#) and [Terms of Use](#). I agree my electronic signature and initials shall have the same force and effect as my written signature or initial.

TYPE SIGNATURE

CLEAR

ADOPT AND SIGN

If Carol decides to draw her own signature, as she has done here, she will need to click **Adopt and Sign** to confirm this as her signature for the remaining fields she will click through.

YOU'RE ALMOST DONE! CLICK FINISH TO SEND THE COMPLETED DOCUMENT BACK TO THE SENDER. FINISH SIGNING

Buyer's Address 700 West Pete Rose way Cincinnati OH 45203

342 **30. ACTION BY SELLER:** The undersigned Seller has read and fully understands the foregoing offer. Seller certifies that the
 343 signatory(ies) below has/have full authority to enter into this Contract and that no additional signatories, spouse or otherwise, are
 344 necessary in order to convey the Real Estate. Seller hereby: ☐ accepts said offer and agrees to convey the Real Estate according
 345 to the above terms and conditions, ☐ rejects said offer, or ☐ counteroffers according to the above modifications initialed and
 346 dated by Seller, which counteroffer shall become null and void if not accepted in writing and physically delivered to Seller or
 347 Seller's agent on or before 12:00 o'clock ☐ (A.M.) ☒ (P.M.) ☐ (Noon) EASTERN/DAYLIGHT STANDARD TIME
 348 1-15-2016

Susan Seller Carol Eliza Seller dotloop verified 10/18/16 04:17pm EDT.

Print Seller's Name	Seller's Signature	Date/Time

As long as there are more fields for her to complete, dotloop will zoom her forward to each signature or initial field. If she were to miss one, dotloop would redirect her to that field. Once all fields are signed, she will click on **Finish Signing**.

Although signature fields are highlighted and dotloop will direct your client to the correct places, they can always click **I'm Done** if there is a signature field that they do not wish to sign. Remember, your clients should still be instructed to read through all documents carefully and you should be available to answer any questions they may have. Let your clients know that they can call you with questions before signing any documents.

You're Done! ×

This document has been automatically shared with: Caroline Margraf

To keep a secure copy of this document, sign up for dotloop—it's FREE!

Carol Eliza Seller

carolseller22@gmail.com

CHOOSE A PASSWORD

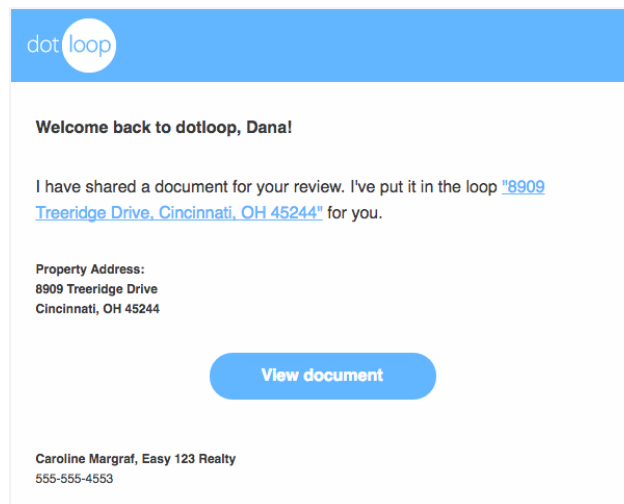
By continuing, you agree with dotloop's [Terms of Use](#) & [Privacy Policy](#).

[SIGN IN IF YOU ARE ALREADY A USER](#) SIGN UP

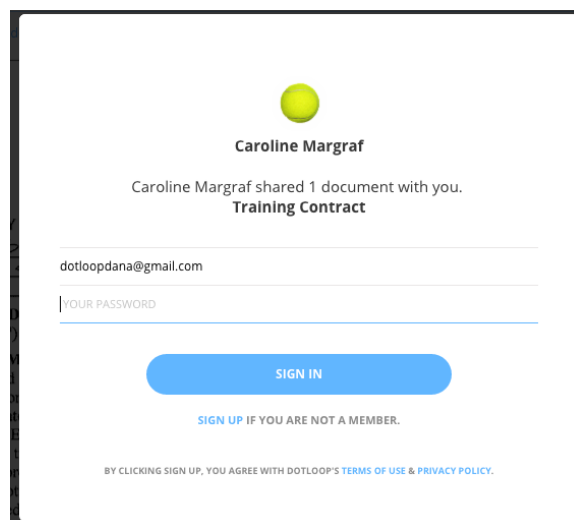
If Carol does not have a Dotloop account, she will be asked to create one. This is entirely optional, however it is recommended if she would like to always have a place to view the documents online. Your clients will see three fields for information. Two of the three will already be filled out with their

name and email address. All they have to do is type in a password of their choice (must be at least 6 characters long with numbers and letters) and click the blue *SIGN UP* button.

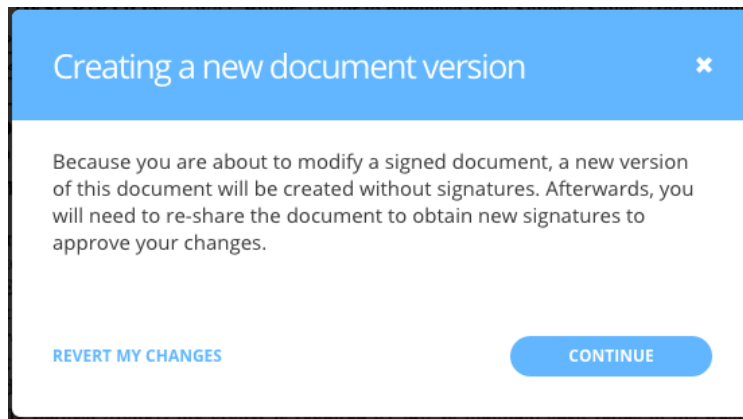
co-op agent experience:



Dana will receive a similar email from you that includes a link to dotloop. In order to work with the documents within the system, Dana will need to make a dotloop account if she does not have an existing one.



Dana will only see the documents you have shared with her in her view of the loop. Although she will see your client's name, she does not see or have access to their contact information, nor can she send messages to them or share documents directly with them. When Dana clicks on the document, she will have full modification privileges.



As soon as Dana makes any text changes to the document, she will be notified that she is *creating a new document version*, wiping any existing signatures from the document. If she is simply preparing the document for her client's signatures, she will be able to do this without losing the current signatures.

Once Dana receives the signed document back from her clients, she will then need to share the document back to you in order for you to see any of Dana's client's signatures.

submitting for review:

The screenshot shows the dotloop premium interface. At the top, there's a blue header with the dotloop logo and 'premium' text. Below the header, there's a navigation bar with links: 'BACK TO MY LOOPS', 'ACTIVITY LOG', 'SET UP EASY OFFER™', and 'SUBMIT TO REVIEW'. The main content area displays the property address '8909 Treeridge Drive, Cincinnati, OH 45244' with a circular icon to the left and flags to the right. Below the address, there's a 'Documents' section with the text 'Anything you add is private until shared.' and links 'SHOW ARCHIVED' and 'ADD FOLDER'. There are two document entries: one labeled 'NOT SUBMITTED' with a folder icon and 'FOLDER' text, and another labeled 'PDF' with a document icon and 'Training Contract' text. Both entries have a 'NOT SHARED' status and a share icon.

Once everything is added and in order, click **Submit to Review**.

The screenshot shows a modal dialog box titled 'Additional details required to submit' with a close button (X). The dialog contains the instruction 'Complete these fields to continue.' and a section labeled 'PROPERTY ADDRESS'. This section has four input fields: 'USA' (a dropdown menu), 'ADD STREET NUMBER', 'ADD STREET NAME', 'ADD CITY', 'OH' (a dropdown menu), and 'ADD ZIP/POSTAL CODE'. A blue 'NEXT' button is located at the bottom right of the dialog.

After you click **Submit to Review**, enter the property address and click **Next**. If you did not see this step it is either because your office has deactivated this requirement or because you have visited the details tab of the loop and have entered it already

Submit for review

Select a folder to submit for review and then categorize it.

☒ Folder

SELECT TYPE

BUYING REVIEW

LISTING REVIEW

INCLUDE A HELPFUL MESSAGE FOR ADMINS

WHY ARE YOU SUBMITTING FOR REVIEW?

SUBMIT

This final pop-up will display all of the folders you have created in this loop. Check the folder you intend to submit, identify whether it is a *Buying* or a *Listing* file, add an optional message to the reviewer for clarification or just for fun, and click **Submit!**

8909 Treeridge Drive, Cincinnati, OH 45244

LISTING FOR SALE

ACTIVE LISTING

VIEW DETAILS

Documents

Anything you add is private until shared.

ADD FOLDER

LISTING NEEDS REV...

☐ FOLDER

ADD DOCUMENT

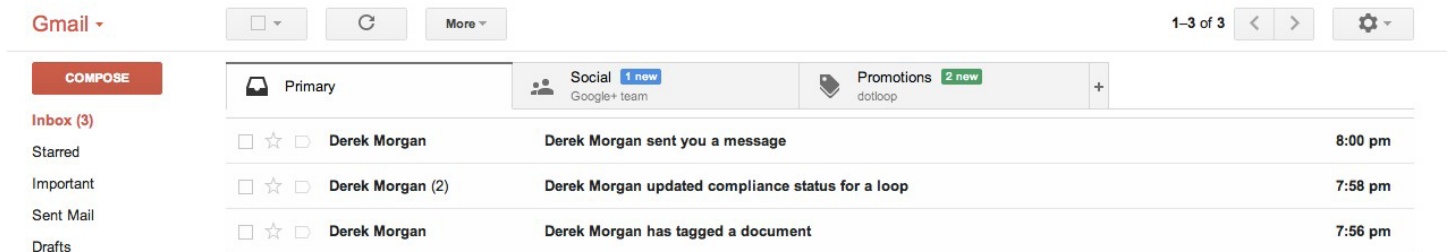
SUBMITTED

☐ Training Contract

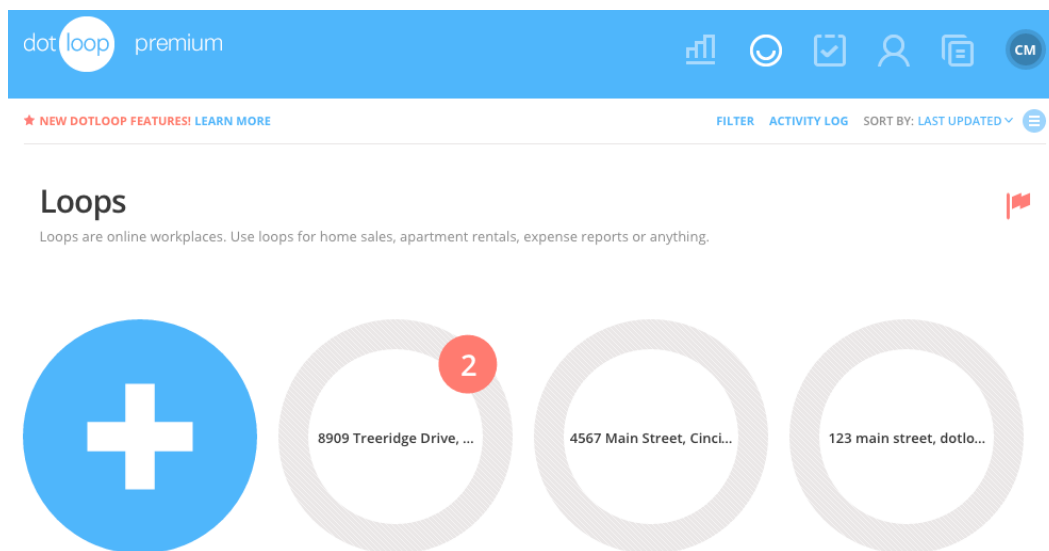
NOT SHARED

After the folder has been submitted, you will see the initial review stage next to the folder name. Notice how the folder above says *Listing Needs Review*. This review stage will be updated by the admin as they move the file through the online review process. Once the file is reviewed, the admin will either change the folder review stage to *Approved* or *Returned to Agent*. If the file has been *Returned to Agent*, it means that there are corrections needed or documents missing. Check for messages, tasks, or tags from your admin to see what is required to correct the folder.

64



Emails will be sent to you as an admin interacts with your file in dotloop, letting you know exactly what needs to be done. Just think about how much faster your transactions can be processed when you and your office staff are always in-the-know in real time! Each one of these emails will contain a link that will bring you directly into the loop. After a while, you may decide that you do not need all of these notifications. No problem, just visit your *My Account* section to adjust your notification preferences.



If you log in to dotloop before checking your email or if you have turned off your email notifications, you will still see an overview of any updates on your homepage. When you open your loop you can easily see everything that has changed since you last logged in. Let's click on 8909 Treeridge Drive to see what our admin has done.

dotloop premium

< BACK TO MY LOOPS ACTIVITY LOG SET UP EASY OFFER™ SUBMIT TO REVIEW

8909 Treeridge Drive, Cincinnati, OH 45244

LISTING FOR SALE ▾ ACTIVE LISTING ▾ VIEW DETAILS

Documents SHOW ARCHIVED ADD FOLDER

Anything you add is private until shared.

RETURNED TO AGENT... ☐ FOLDER ADD DOCUMENT ⋮

RETURNED ☐ Training Contract MISSING SIGNATURE NOT SHARED 👤 1 🚩 ⋮

Notice that our admin has tagged the training contract, added a message to the training contract, and updated review stage to *Returned to Agent*.

So what's next? You guessed it – all you have to do is make the necessary corrections and click the **Submit to Review** button. This will change the review stage from *Returned to Agent* to *Listing Needs Review* once more.

Submit for review

Select a folder to submit for review and then categorize it.


☒ Folder LISTING REVIEW ▾

INCLUDE A HELPFUL MESSAGE FOR ADMINS

WHY ARE YOU SUBMITTING FOR REVIEW?

SUBMIT

To resubmit the folder after corrections, follow the same steps as before.



8909 Treeridge Drive, Cincinnati, OH 45244

LISTING FOR SALE

ACTIVE LISTING

VIEW DETAILS

Documents

Anything you add is private until shared.

ADD FOLDER

LISTING NEEDS REV...

☐

FOLDER

ADD DOCUMENT

SUBMITTED

☐

Training Contract

NOT SHARED

1

Now that the folder has been resubmitted, the review stage has changed back to *Listing Needs Review*.

dot loop premium


CM

< BACK TO MY LOOPS

ACTIVITY LOG

SET UP EASY OFFER™

SUBMIT TO REVIEW



8909 Treeridge Drive, Cincinnati, OH 45244

LISTING FOR SALE

ACTIVE LISTING

VIEW DETAILS

Documents


Anything you add is private until shared.

LISTING APPROVED

☐


FOLDER

OCTOBER 06, 10:26 AM EDT



Caroline Margraf (Admin for Success Management Brokerage) changed review stage for folder Folder **FROM LISTING NEEDS REVIEW TO LISTING APPROVED**

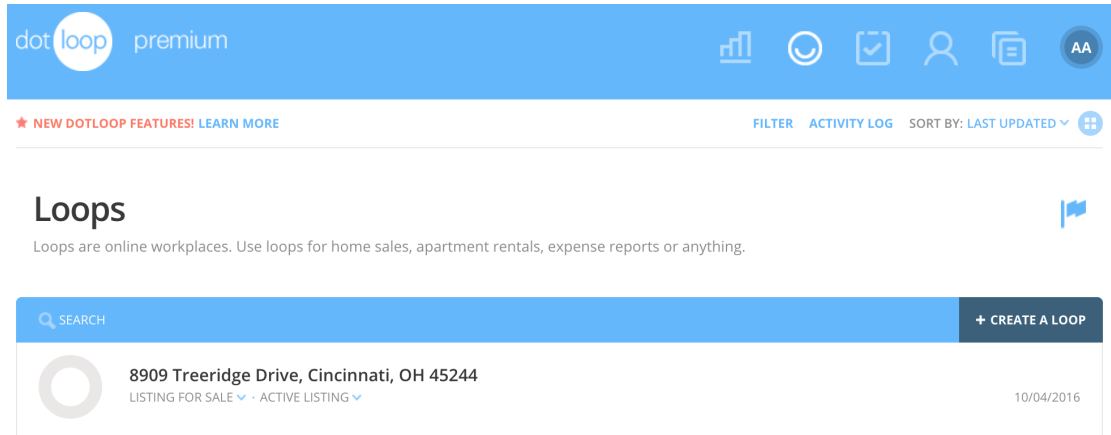
OCTOBER 06, 10:26 AM EDT



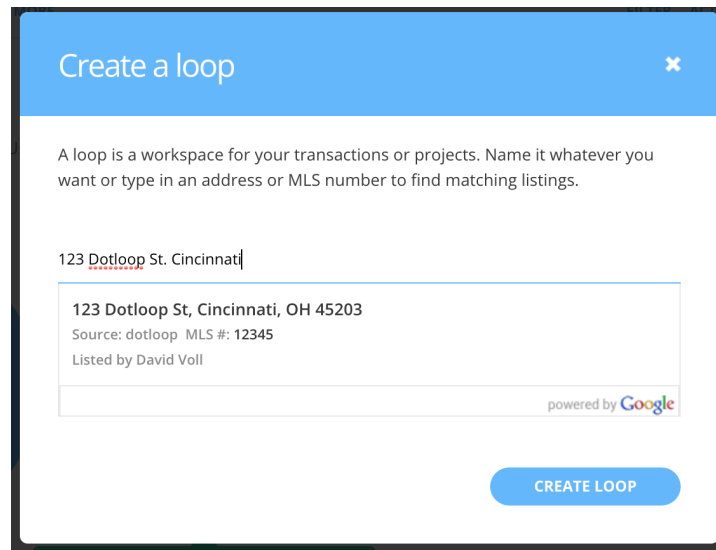
Caroline Margraf (Admin for Success Management Brokerage) changed review stage for folder Folder **FROM LISTING NEEDS REVIEW TO LISTING APPROVED**

Now that we've made the necessary corrections and the file has been reviewed for the second time, you'll see that the review stage has been updated to *Approved*. If you were to click on the notification center to view the update as we have done above, you will see that the last notification explains that the admin has updated the review stage. Once you are paid, the admin will move the file to its final review stage *Closed*. Congratulations – you've completed a loop!

making an offer:



Previously, we created a loop starting from the grid view of the homepage. This time, we'll create the loop on the list view. Click **Create a Loop** button and we'll start an offer.



Here we can link directly to the listing by searching the address in the window where we name our loop. If the property is listed in dotloop you will see the agent's name below the address.

Note: If we link to a listing, the listing agent is not notified. As always, everything is private until shared.

The screenshot shows a 'Create a loop' dialog box with a blue header. Below the header, there is explanatory text about loops. A specific listing is shown: '123 Dotloop St, Cincinnati, OH 45203 Listed by David Voll'. A yellow modal box is overlaid on the listing, asking 'Would you like to save time by importing the listing details from dotloop?'. It includes a disclaimer about auto-populated information and an 'IMPORT DATA' button.

If this listing is correct, select **Import Data**. The name of the loop will take that of the address you've selected and then choose **Create Loop** (see below).

This screenshot shows the 'Create a loop' dialog box after the import step. The yellow modal box is gone, and the listing '123 Dotloop St, Cincinnati, OH 45203 Listed by David Voll' is now in a text input field. A blue 'CREATE LOOP' button is visible at the bottom right of the dialog.

If we already have the loop set up we can also link via the document editor, or the **View Details** page. We will first need to set our loop **Transaction Type** to *Purchase*. It is also suggested to set yourself as the Buying Agent. *Note: Any Loop Status can be chosen and will not affect our ability to make an offer.*

PROPERTY ADDRESS

PROPERTY

123 Dotloop St. Cincinnati

123 Dotloop St, Cincinnati, OH 45203

Source: dotloop MLS #: 12345

Listed by David Voll

powered by Google

CITY

STATE/PROV

ZIP/POSTAL CODE

We can now link to the property either by opening an interactive document, or in the **View Details** section.

linking within the document:

To search via an interactive document let's first open the document. We will now be presented with the New AutoFill window. Scroll down the window to the search bar for the property address and type in the address or MLS number. You will be presented with all available listings.

Note: to ensure you are linking to a dotloop listing, make sure the address has the name of the Listing Agent below the address, as shown below.

PROPERTY ADDRESS

PROPERTY

123 Dotloop St. Cincinnati

123 Dotloop St, Cincinnati, OH 45203

Source: dotloop MLS #: 12345

Listed by David Voll

powered by Google

CITY

STATE/PROV

ZIP/POSTAL CODE

PROPERTY ADDRESS

PROPERTY

123 Dotloop St, Cincinnati, OH 45203 Listed by David Voll

Would you like to save time by importing the listing details from dotloop?

Auto-populated information is provided solely for your convenience and dotloop disclaims any representation as to the accuracy or completeness of this information. You are responsible for verifying the accuracy and completeness of all information entered into dotloop, including auto-populated information.

IMPORT DATA

STREET NUMBER

STREET NAME

UNIT NUMBER

When you select the proper listing, dotloop will ask if you are sure if you want to link to this listing.
note: this cannot be undone!

linking in the View Details page:

In the View Details page we can also search to link to the property if we have not done so within a document.

PROPERTY ADDRESS

PROPERTY

123 Dotloop St, Cincinnati

123 Dotloop St, Cincinnati, OH 45203

Source: dotloop MLS #: 12345

Listed by David Voll

UNIT NUMBER

CITY

STATE/PROV

This will again ask you to ensure this is the proper listing.

71

PROPERTY ADDRESS

PROPERTY

123 Dotloop St, Cincinnati, OH 45203 Listed by David Voll

Would you like to save time by importing the listing details from dotloop?

Auto-populated information is provided solely for your convenience and dotloop disclaims any representation as to the accuracy or completeness of this information. You are responsible for verifying the accuracy and completeness of all information entered into dotloop, including auto-populated information.

IMPORT DATA

COUNTRY

STREET NUMBER

STREET NAME

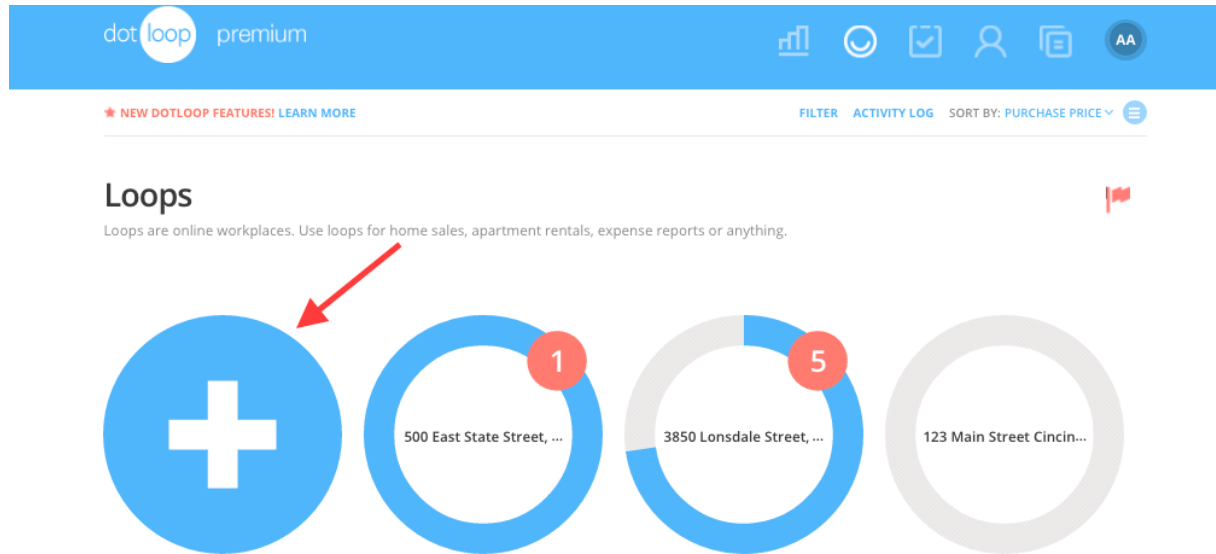
Now that you have joined your buying loop with the listing agent's loop you can begin by sharing documents or sending a message to the listing agent, introducing yourself.

Pro Tips

- Making an offer only gives you the listing information, as well as adds you to the listing agents loop, and the listing agent to your loop.
- All documents on both sides of the transaction will remain private until shared.

managing your listings:

Now that you know how to create an offer, let's talk about managing the listing paperwork and offers that come in on your listings. Rather than recap everything we've already learned, we'll be taking a few shortcuts along the way to get to the main points.



Let's start by creating a new listing. Click the blue '+' to create a new loop if you are on the grid view.

The 'Create a loop' dialog box has a blue header with the title 'Create a loop' and a close button. The main content area is white and contains the text: 'A loop is a workspace for your transactions or projects. Name it whatever you want or type in an address or MLS number to find matching listings.' Below this text is a text input field containing the address '404 State Avenue, Cincinnati, OH 45204 - Tyler and Kellie Jones'. Under the input field is a dropdown menu with the text 'SELECT A TEMPLATE'. At the bottom right of the dialog box is a blue button with the text 'CREATE LOOP'.

Next, name the loop.

dotloop premium

BACK TO MY LOOPS ACTIVITY LOG SET UP EASY OFFER™ SUBMIT TO REVIEW

123 Main Street, Cincinnati, OH 45203

LISTING FOR SALE UNDER CONTRACT \$350,000 10/15/2016 VIEW DETAILS 2016 - ZILLOW - FSBO

Documents

Anything you add is private until shared.

SHOW ARCHIVED ADD FOLDER

UNDER CONTRACT ☐ LISTING FOLDER ADD DOCUMENT

APPROVED	DOCUMENT	SIGNED	NOT SHARED
<input type="checkbox"/>	Lead-Based Paint Disclosure - Housing Sale...	SIGNED 2	
<input type="checkbox"/>	OH - Residential Property Disclosure Form	NOT SHARED 1	
<input type="checkbox"/>	Exclusive Right to Sell Listing Contract (CABR)	NOT SHARED 1	

Here's where we fast-forward a bit. In the loop above we have already added our client, signed the original listing paperwork and submitted the listing folder review to the office. The office has approved the folder and the listing is now active and ready for offers.

As you receive offers, you will want to create separate folders to manage the documents from each potential buyer.

123 Main Street, Cincinnati, OH 45203

LISTING FOR SALE UNDER CONTRACT \$350,000 10/15/2016 VIEW DETAILS 2016 - ZILLOW - FSBO

Documents

Anything you add is private until shared.

SHOW ARCHIVED ADD FOLDER

☐ OFFER FROM BETH BUYER ADD DOCUMENT

TEMPLATES BROWSE EMAIL

ADD DOCUMENT

OPEN ALL SHARE ALL RENAME DUPLICATE ARCHIVE

On the upper right hand side, you will see where you can click on **Add Folder**, a cursor will appear in the name of the new folder for your adding for you to rename. You can also click on the three dots to the right of the folder name to rename it.

Offers you receive will offer be sent to you as an email attachment if the buying agent is not yet using dotloop. You can either download the attachment to your computer for upload into dotloop or you can see the email features section of this manual to see how to email the files directly into the new folder you've created for this loop.

Easy Offer™:

You might be tempted to share the Seller's Disclosures (and other applicable documents) with the Buyer's Agent directly from your Listing Documents folder, but a better option is to create a folder via the Easy Offer link to share with anyone who might make an offer on your listing.

The Easy Offer™ feature will allow the Listing Agent of a loop to share a folder and its documents via a public link. This will allow you to quickly and easily share information and documents on your listing to any Buying Agent interested in making an offer on your listing.

Listing agent benefits

- Better market your listing--save time and create a better experience for interested parties.
- Track the names and emails of people who access your folders.
- Users can share this link easily with anyone who might be interested in those documents.
- Get a chart showing how many people are joining your loops through Easy Offer™.
- Rental agents can use this as a way to distribute applications and marketing flyers for the property.

As a Listing Agent, the main objective is to obtain and solicit offers. Easy Offer™ allows you to quickly share disclosures to interested buying agents so they can easily submit offers. These disclosures are a package of listing documents shared with interested parties containing property details the seller is obligated to disclose. This is also known as an "offering memorandum".

Making Folders Public

As a Listing Agent looking to make folders available to Buying Agents, let us first start by changing your role in the loop to *Listing Agent*, to make all Buying Agents aware of your role. Next, we will want to ensure that we have the correct *Transaction Type* and *Loop Status* set for the loop.

To enable the link the loop must first contain the following Transaction Types:

- Listing for Sale
- Listing for Lease


as well as the following Loop Statuses:

- Pre-Listing
- Private Listing
- Active Listing



- Under Contract

Once the loop fits these criteria you as the Agent must click on the *Set up Easy Offer™* option at the top right of the screen, next to the link for the Activity Log.

[< BACK TO MY LOOPS](#)[ACTIVITY LOG](#)[SET UP EASY OFFER™](#)[SUBMIT TO REVIEW](#)














123 Main St
[LISTING FOR SALE](#) [ACTIVE LISTING](#) [VIEW DETAILS](#)



Documents

Anything you add is private until shared.

[SHOW ARCHIVED](#) [ADD FOLDER](#)

NOT SUBMITTED	<input type="checkbox"/>	 OFFER FOLDER	ADD DOCUMENT	
OPTIONAL	<input type="checkbox"/>	Real Estate Agreement	NOT SHARED  	
OPTIONAL	<input type="checkbox"/>	Disclosure	NOT SHARED  	
OPTIONAL	<input type="checkbox"/>	Addendum	NOT SHARED  	

Once clicked you will be prompted with the *Set up Easy Offer™* window. Here in this window you will click on the checkbox to the left of the folder (or folders) that you would like to make public.

Set up Easy Offer™

Designate which document folders should be given to dotloop members making an offer on this loop. They will get their own private copy of the documents and can share documents back with you. dotloop will log which members access the link you share. [LEARN MORE](#)

1. SELECT LISTING AGENT

[SELECT LISTING AGENT](#)

The listing agent will be displayed on the public link.

2. SELECT A FOLDER 1 FOLDER SELECTED

☒ [OFFER FOLDER](#)

3. SHARE LINK

<https://www.dotloop.com/my/loop/p/7okNfCXAhDk?v=2Ztg0> [COPY](#)

[DISABLE LINK](#) [SAVE](#)

Check marking a folder will automatically generate a shareable link that will display at the bottom of the window. This link can then be copied via the **COPY** button to the right of the link and shared to anyone you want to allow access to this folder, and its documents contained within, to anyone of your choosing. When finished, make sure to press the **SAVE** button at the bottom right of the window. This will make the link active for public use.

Set up Easy Offer™

Designate which document folders should be given to dotloop members making an offer on this loop. They will get their own private copy of the documents and can share documents back with you. dotloop will log which members access the link you share. [LEARN MORE](#)

1. SELECT LISTING AGENT

[SELECT LISTING AGENT](#)

The listing agent will be displayed on the public link.

2. SELECT A FOLDER 1 FOLDER SELECTED

☒ [OFFER FOLDER](#)

3. SHARE LINK

<https://www.dotloop.com/my/loop/p/7okNfCXAhDk?v=2Ztg0> [COPY](#)

[DISABLE LINK](#) [SAVE](#)

Note: the 'Set up Easy Offer™' option will only appear on the page when the loop fits the specific Transaction Type, as well as the corresponding Transaction Status.

Another thing to note is that you can also select the listing agent for the loop. If you are the originator

of the loop you will automatically be set as the listing agent. If you have multiple people on your team in the loop with the role of listing agent then more options will be shown to select as the listing agent.

Set up Easy Offer™

Designate which document folders should be given to dotloop members making an offer on this loop. They will get their own private copy of the documents and can share documents back with you. dotloop will log which members access the link you share. [LEARN MORE](#)

1. SELECT LISTING AGENT

SELECT LISTING AGENT

DAVID VOLL

2. SELECT A FOLDER

1 FOLDER SELECTED

☒ OFFER FOLDER

3. SHARE LINK

https://www.dotloop.com/my/loop/p/7okNfCXAhDk?v=2Ztg0

COPY

DISABLE LINK

SAVE

Once you have successfully enabled the folder(s) you will see *Accessible Via Easy Offer™* to the right of each folder name that was made public.

Note: once you make a folder public, you will not be able to share documents from that folder unless you disable the link.

[BACK TO MY LOOPS](#)

[ACTIVITY LOG](#) [SET UP EASY OFFER™](#) [SUBMIT TO REVIEW](#)

123 Main St

[LISTING FOR SALE](#) [ACTIVE LISTING](#) [VIEW DETAILS](#)

Documents

Anything you add is private until shared.

NOT SUBMITTED

☐ OFFER FOLDER • ACCESSIBLE VIA EASY OFFER™

ADD DOCUMENT

OPTIONAL

☐ Real Estate Agreement

NOT SHARED 2

OPTIONAL

☐ Disclosure

NOT SHARED 2

OPTIONAL

☐ Addendum

NOT SHARED 2

Disabling public folders

At any point you can disable your public folders quickly and easily. This can be done a few ways.

First, clicking on the *Set up Easy Offer™* button, and navigating to the bottom left of the window, you

can click on the *DISABLE LINK* option.

Set up Easy Offer™

Designate which document folders should be given to dotloop members making an offer on this loop. They will get their own private copy of the documents and can share documents back with you. dotloop will log which members access the link you share. [LEARN MORE](#)

1. SELECT LISTING AGENT

[SELECT LISTING AGENT](#)

The listing agent will be displayed on the public link.

2. SELECT A FOLDER 1 FOLDER SELECTED

☒ [OFFER FOLDER](#)

3. SHARE LINK

<https://www.dotloop.com/my/loop/p/7okNfCXAhDk?v=2Ztg0> [COPY](#)

[DISABLE LINK](#) [SAVE](#)

Also, changing the loop to any Transaction Type or Transaction Status will automatically disable the link.

123 Main St

[LISTING FOR SALE](#) [ACTIVE LISTING](#) [VIEW DETAILS](#)

[PRE-LISTING](#)
[PRIVATE LISTING](#)
[ACTIVE LISTING](#)
[UNDER CONTRACT](#)
[SOLD](#)
[ARCHIVED](#)

[SHOW ARCHIVED](#) [ADD FOLDER](#)

Documents
Anything you add is private

☐ [OFFER FOLDER](#) [ACCESSIBLE VIA EASY OFFER™](#) [ADD DOCUMENT](#)

☐ **Real Estate Agreement** NOT SHARED 2 [ADD](#)

☐ **Disclosure** NOT SHARED 2 [ADD](#)

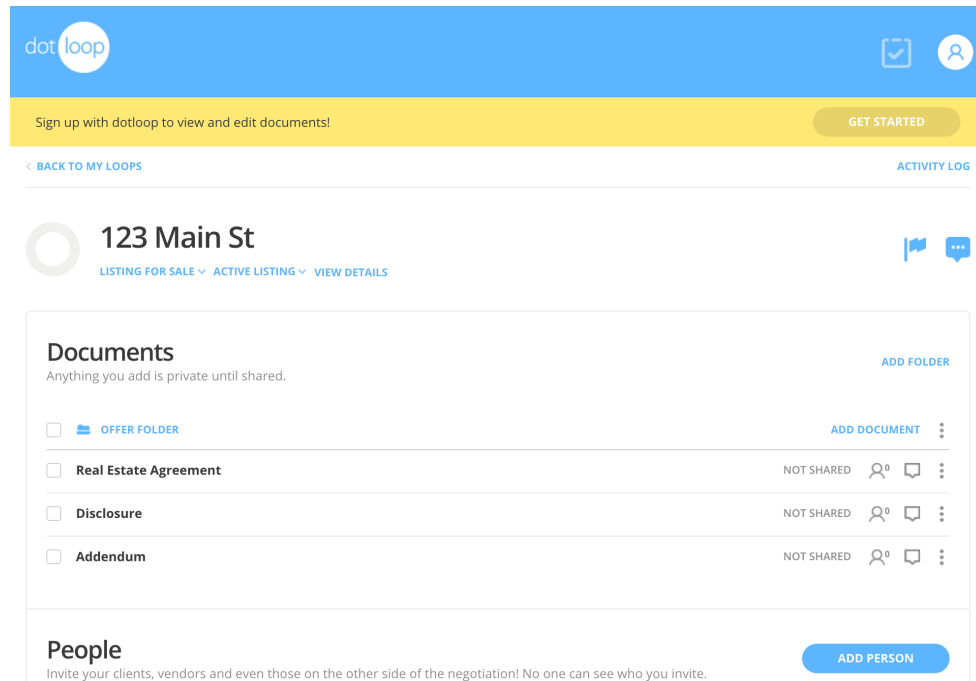
☐ **Addendum** NOT SHARED 2 [ADD](#)

Once a link is disabled it will no longer allow any future users to access the loop, but anyone who has previously accepted the loop will still have access.

Accepting public folders

So you're a Buying Agent and a Listing Agent has just shared a link with you to view documents in their loop. To accept this loop and start making an offer we need to follow a few easy steps.

First, let's click on the link. This will open the shared loop and display the folders, and documents contained within, that are available to you. If you are already a dotloop member, make sure that you are signed out before clicking on the link.



I'm a new user:

Once you've clicked on the page you will notice you are prompted with a few fields to fill out. Simply fill in your full name, email address, password of your choosing, and select your role. Lastly, click on the *Sign Up for Free* button and you will be ready to go!


I'm an existing user:

Not a problem! At the bottom of the window click on the link to Sign In, fill in your email and password, and you're ready!

Once you've accepted the loop into your account this will copy all the folders and documents from the Listing Agent into your new loop, as well as all available details and MLS data for the loop. The documents within the loop will be fully editable and private for you to work on, until you are ready to share them back to the Listing Agent.



Receiving offers

Once a buying agent has used your link to access the listing documents they will then share the completed offer documents back to you. This will create a new folder within your listing loop. The folder will have the same name as your listing folder, but will include the agent's name so you can easily navigate each offer.



123 Main St





















[LISTING FOR SALE](#) [ACTIVE LISTING](#) [VIEW DETAILS](#)



Documents

Anything you add is private until shared.

[SHOW ARCHIVED](#) [ADD FOLDER](#)

NOT SUBMITTED	<input type="checkbox"/>	OFFER FOLDER - BARRY WATERS	ADD DOCUMENT	
PDF	<input type="checkbox"/>	Real Estate Agreement	 ³	 
PDF	<input type="checkbox"/>	Disclosure	 ³	 
PDF	<input type="checkbox"/>	Addendum	 ³	 
NOT SUBMITTED	<input type="checkbox"/>	OFFER FOLDER - ACCESSIBLE VIA EASY OFFER™	ADD DOCUMENT	
OPTIONAL	<input type="checkbox"/>	Real Estate Agreement	NOT SHARED  ²	 
OPTIONAL	<input type="checkbox"/>	Disclosure	NOT SHARED  ²	 
OPTIONAL	<input type="checkbox"/>	Addendum	NOT SHARED  ²	 

As you receive multiple offers you will notice new folders appearing in your loop. Each new offer you receive will create a new folder that will follow the same format of the folder name, followed by the buying agents name who is making the offer. This will help keep each offer organized.

Pro Tips

- As the Listing Agent you can view the activity of any Buying Agent who has accepted your loop via the Activity Log, or under the Dashboard charts.
- Any documents added to the folder you have made public will be instantly available to those who have accepted your loop.
- All other loop folders, messages, and activity will still be private within your loop.

global task section:



The task icon in your global navigation bar displays the tasks that you have created throughout all of your loops. Let's click on the task icon in white above to view our global task section.

Tasks

Stay on top of it all.

ASSIGNED TO ME

OVERDUE

COMPLETED

ALL TASKS

+ ADD TASK

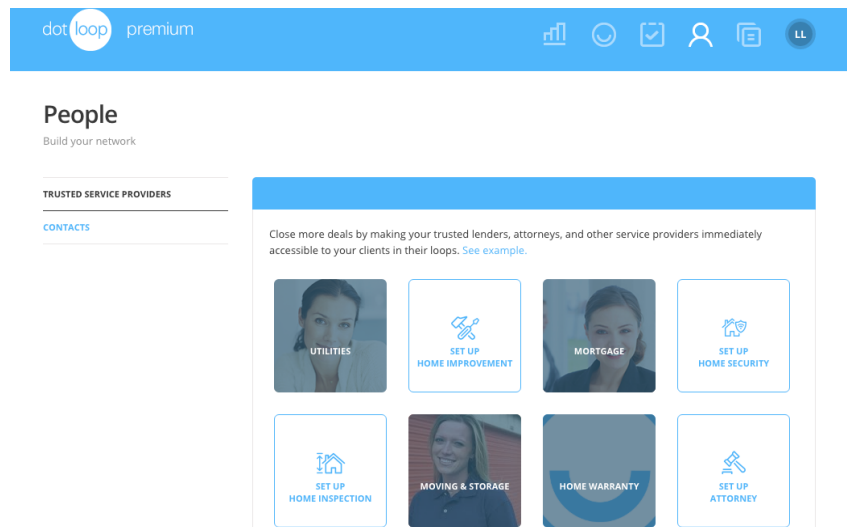
No tasks match your criteria

By default, you will be looking at **All Tasks**. This means that you will see tasks that you've created for your clients as well as tasks that your admins have created. *Overdue* tasks will appear in red. You can also add a new task directly from this screen.

global people section:



The *people icon* in your global navigation bar will keep track of anyone that you've worked within a loop. Let's click this icon and take a look.



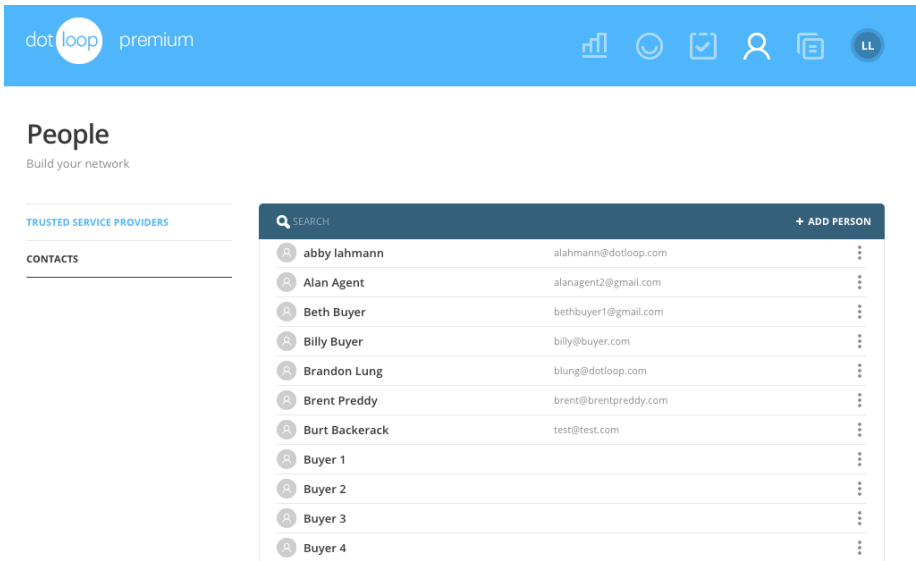
Your people section is going to open to **Trusted Service Providers**. dotloop has a built-in section within your account where you can keep a rolodex of service providers you work with on a regular basis. Adding your **Trusted Service Providers** means connecting your home buyers and sellers with the service providers you trust and recommend. It's like the list of service providers you already provide to clients without the paper and hassle.

A screenshot of a form titled "Add your utility providers" with a close button (X) in the top right corner. The form has two input fields: "ADD FULL NAME" and "ADD EMAIL". At the bottom right, there is a grey button labeled "ADD UTILITY PROVIDERS".

Adding your **Trusted Service Providers** is really easy! Choose the proper industry for your provider and simply click for the add prompt. Enter their full name and email, then click **Add Provider** to send

the invitation. Once the **Trusted Service Provider** has accepted your invitation, they will appear within your loops!

If I want to see a list of everyone I've worked with in a loop, I'll click on **Contacts** from my menu on the left.



In this section, you can search for existing people, add a new person or delete a person. If you click on a person's name you can also store more information about that person. Let's click on Beth Buyer's name.

Beth Buyer

CONTACT INFORMATION

*FIRST NAME

Beth

MIDDLE NAME

ADD MIDDLE NAME

*LAST NAME

Buyer

EMAIL ADDRESS

bethbuyer1@gmail.com

PHONE

ADD PHONE

OFFICE PHONE

ADD OFFICE PHONE

CELL PHONE

ADD CELL PHONE

FAX NUMBER

ADD FAX NUMBER

COUNTRY

USA

STREET ADDRESS

ADD STREET ADDRESS

UNIT NUMBER

ADD UNIT NUMBER

CITY

ADD CITY

STATE/PROVINCE

SELECT

ZIP/POSTAL CODE

ADD ZIP/POSTAL CODE

COMPANY NAME

ADD COMPANY NAME

ROLE

SELECT

* Required

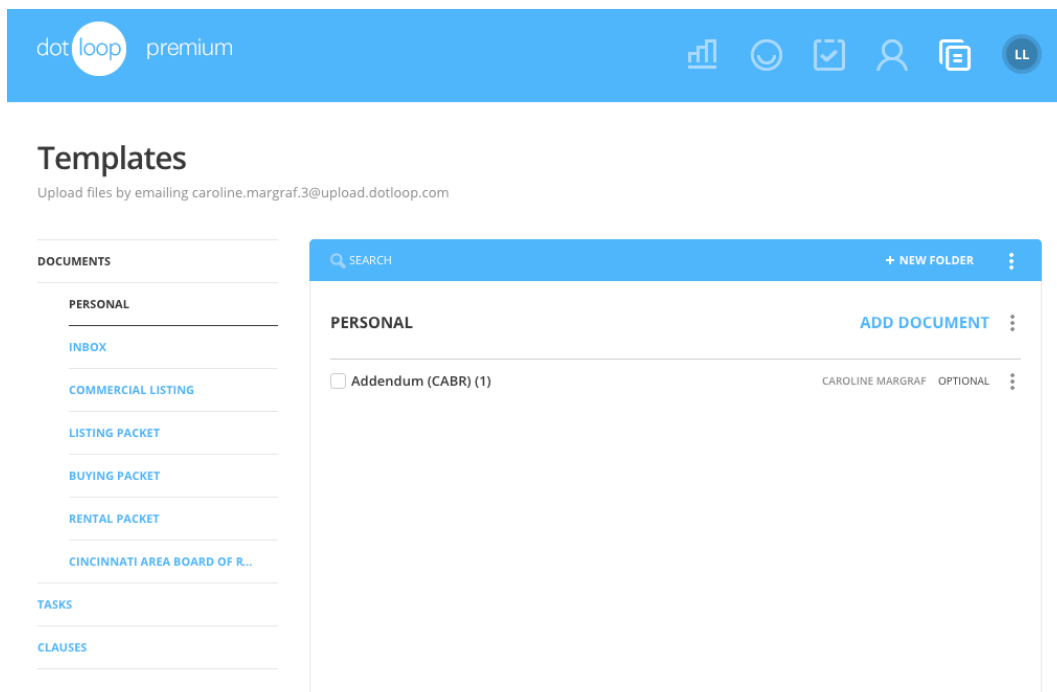
SAVE

After clicking on her name, I can now edit her information or add additional contact information. Any information I had provided about her within the loop she was a part of will also be completed in this page.

global templates section:

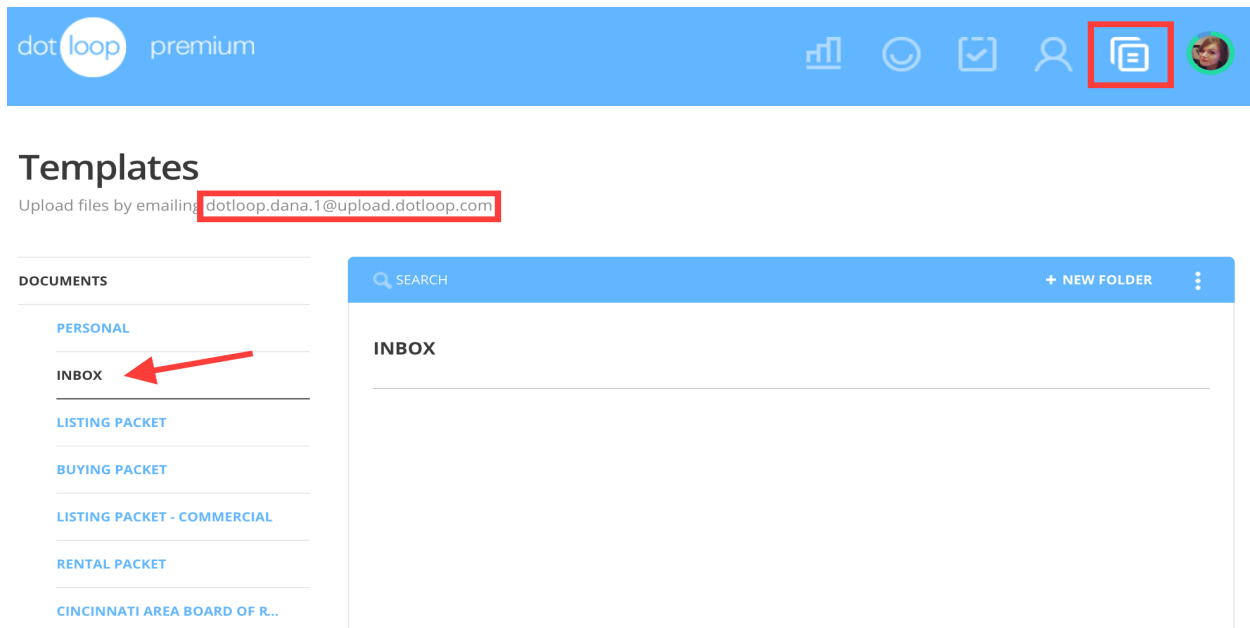


The templates icon houses the documents or document sets that your brokerage or association has made available to you. You can print blank documents from here, but if you would like to edit a document or obtain e-signatures, you will need to create a loop and add the desired document template from within the document section of that loop. Let's click on the templates icon to see our options.

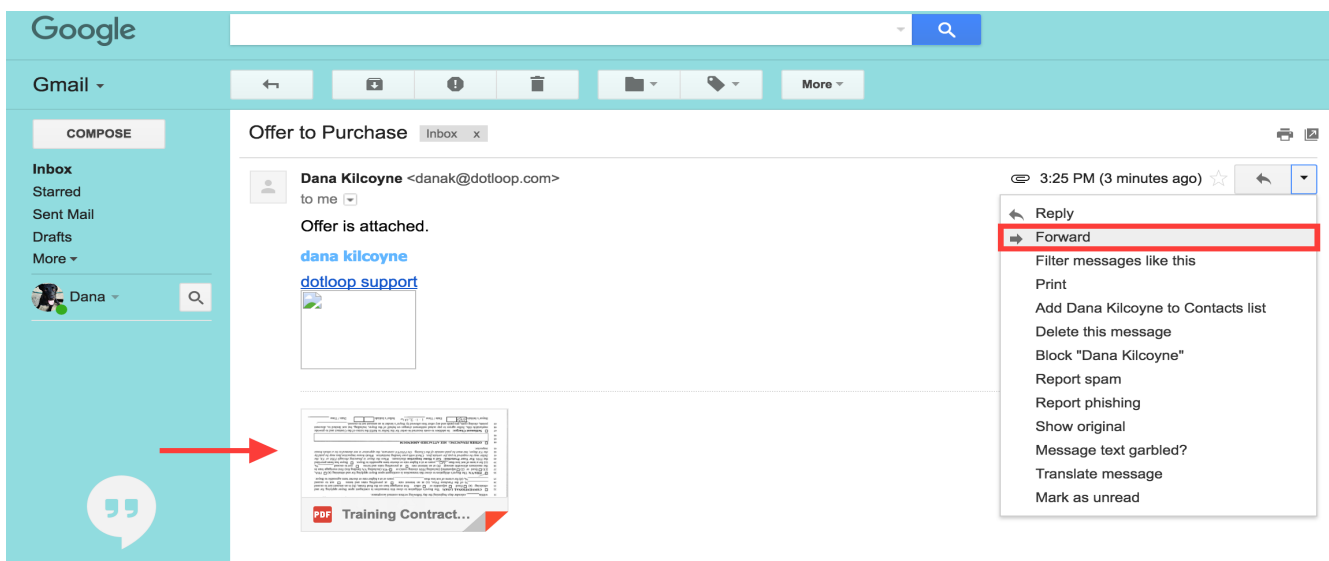


On the left you will see all of the document folders available to you. You can upload and store PDFs in your Personal folder and can even place interactive fields onto these PDFs to save them as a reusable template in their loops.

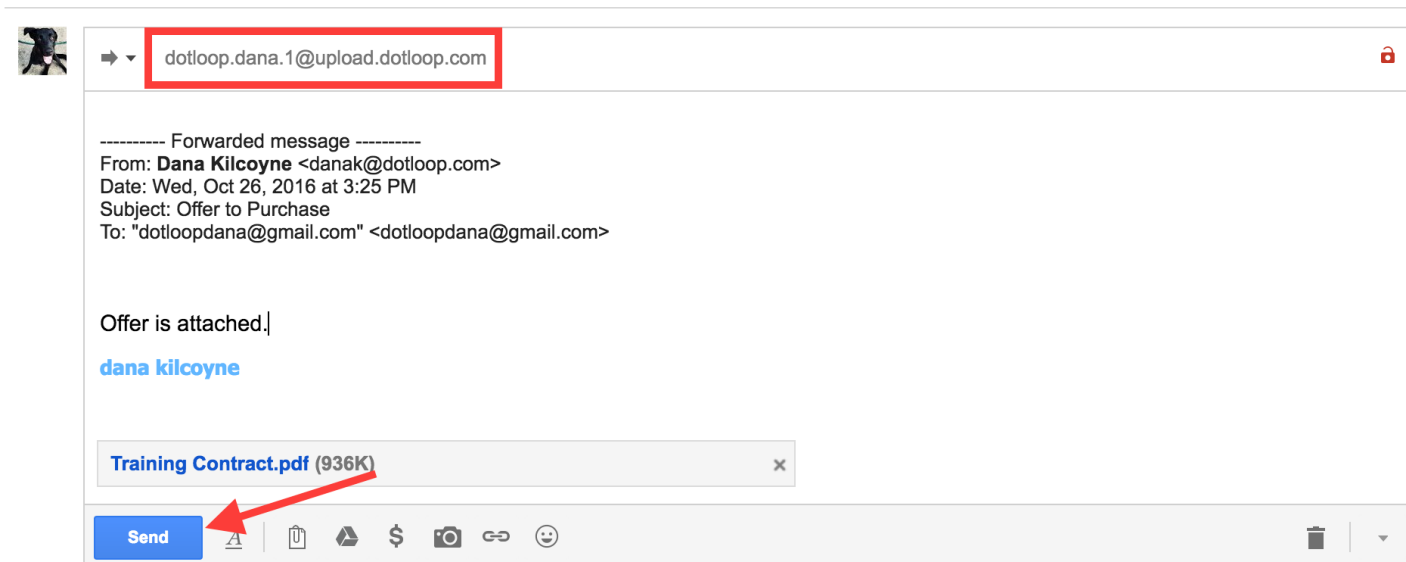
All of the other folders contain Interactive Documents and PDFs that have been made available to you by your brokerage or association. You can also create your own customized folders where you can save default information onto your Interactive Documents and PDFs.



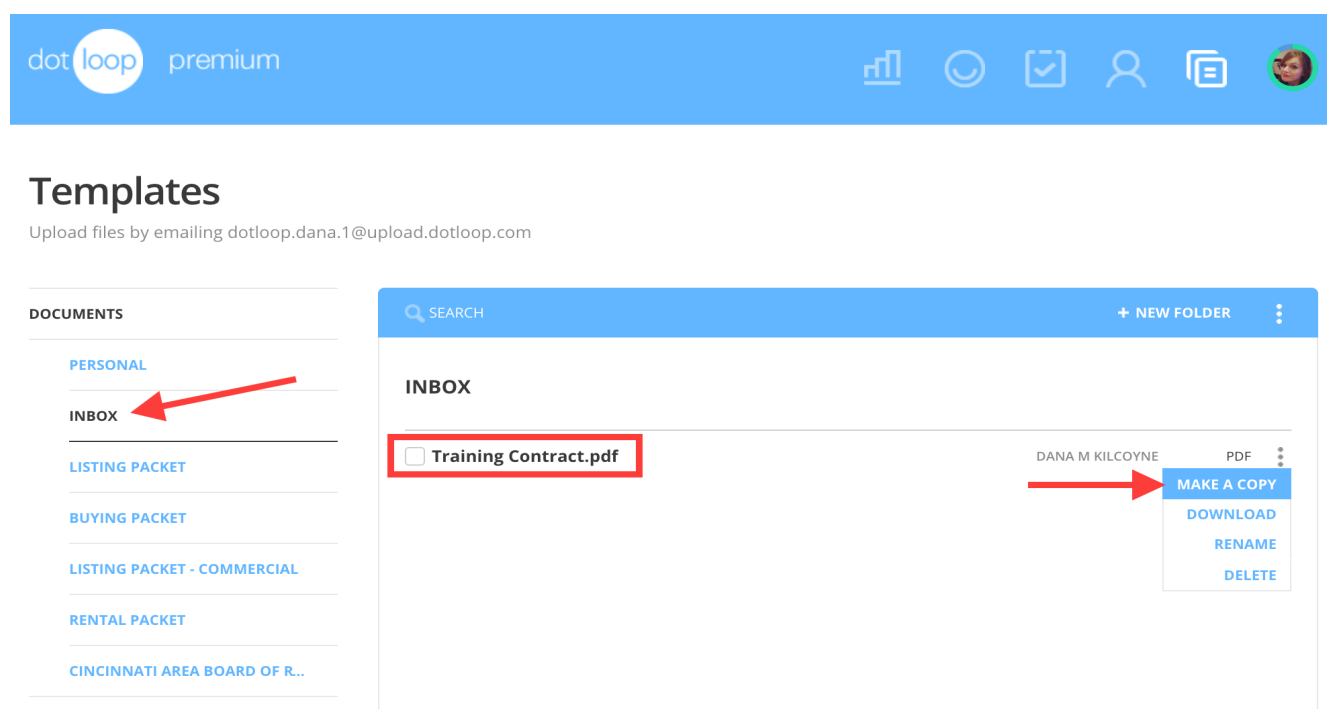
The most basic email feature in dotloop involves forwarding PDF documents from your email inbox to an inbox in dotloop. You will first need to copy and paste your upload.dotloop.com email address from your templates section into your email contact list. This upload email address is specific to your dotloop account and any documents that you forward will appear in your inbox on the left. Let's go to our email to see how this works.



If you receive an offer via email and you would like to forward it to your dotloop inbox, click **Forward**.



Next, paste your upload email address into the recipients, or 'To:' section of the email. After you do this once, you should be able to select your upload email address from your contract list in the future.



The forwarded PDF will now appear in the inbox folder of your Templates section. You can copy this document to a loop from here, or you can select the PDF from your Templates when you are in a loop.

DOCUMENTS
TASKS
UNDER CONTRACT TASKS
FRONT DESK LISTING CHECKLIST
CLOSING CHECKLIST
SELLER TASK LIST
FIRST TIME HOME BUYER TASK LIST
LISTING TASK LIST
CLAUSES

Below your folders you will find your **Tasks** section which was previously discussed. This section is where you can create and store task lists to bring into a loop.

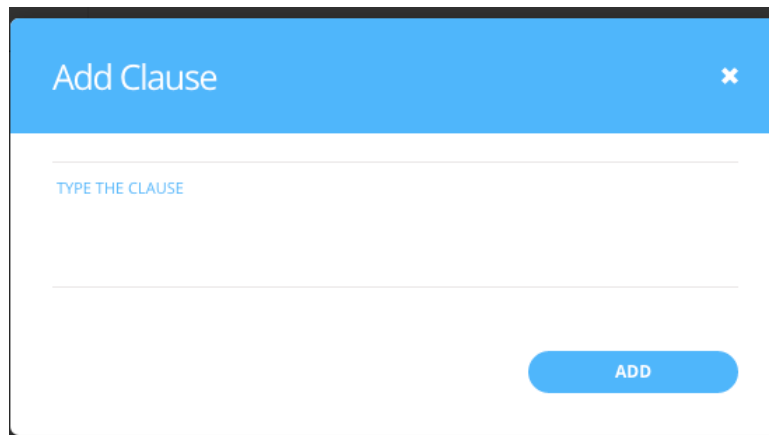
Templates

Upload files by emailing caroline.margraf.3@upload.dotloop.com

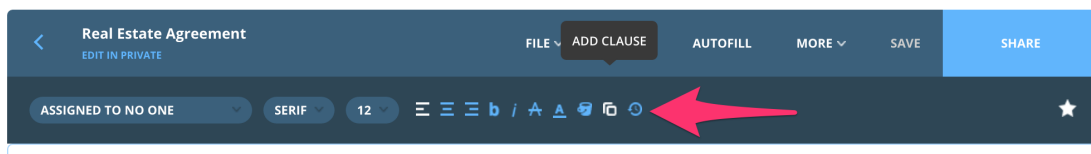
DOCUMENTS	<div> <div>+ NEW CLAUSE</div> <div> <div>CLAUSES</div> <div> <div>dotloop training is fun! I always learn a lot!</div> <div>This is how you create a Santa Clause!</div> <div>This information needs to be added when the transaction is a short sale</div> <div>This is a new clause. It's going to make it super simple for my agents to add a lot of information they might need to add to certain addendums!</div> <div>In the event of a short sale, I need this, this and this.....</div> <div>this is my new clause and it makes it really simple to add a lot of information super fast!</div> </div> </div> </div>
TASKS	
CLAUSES	

Below your **Tasks** you will find **Clauses**. A clause is a phrase that you can create and save in order to quickly insert it while editing documents. If there's any line or paragraph of text that you find yourself typing over and over again, save it as a clause and you'll be able to quickly insert it while filling out documents in a loop!

To make a new clause, click on **+New Clause**.

A modal dialog box titled "Add Clause" with a close button (X) in the top right corner. The main area contains a text input field with the placeholder text "TYPE THE CLAUSE". At the bottom right, there is a blue button labeled "ADD".

Type or copy any phrase in this window and click **Add**.



Clauses can be added one of two ways into a text field. They can be manually added by selecting the clause icon with a text field selected.



Or by beginning to type the clause. We will suggest the rest for you. Only clauses that will fit within the currently selected text field will be suggested.

in house transactions:

There are a few best practices for working together in a loop with someone in the same office or brokerage. The listing agent should already have a loop created for the original listing documents. This means that any agent in your office who would like to make an offer on the listing should first email or call the listing agent to be invited in. A good way to invite the buying agent into the loop would be to share necessary disclosures. The buying agent can create a new offer folder in their view of the loop and complete the purchase contract with their buying client. If the buying agent has already created their own loop, we recommend that they copy their offer documents into the loop that you invite them into. The buying agent would then archive their original loop.





managing both sides of a transaction:

If you are managing both sides of a transaction you should already have a loop created with the listing documents completed. Follow the steps below to add your buyers to the same loop and make an offer.

People

Invite your clients, vendors and even those on the other side of the negotiation! No one can see who you invite.

[ADD PERSON](#)

	Betty B Buyer bettybbuyerdotloop@gmail.com	BUYER ▾	⋮
	Admin for Success Management Bro...	ON MY TEAM	LISTING BROKER ▾
	Dana Kilcoyne (you) dotloopdana@gmail.com	LISTING AGENT ▾	⋮
	Sarah Seller sarahsellerdotloop@gmail.com	SELLER ▾	⋮











Add your buyer and assign their role. You have probably already assigned your role as the listing agent. This is fine, you can still assign the buying agent fields on any documents to yourself.

Go into View Details and add the new Offer Side information that you know. Create a new folder to add the buying documents to and stay organized inside of your loop!

Documents

Anything you add is private until shared.

[ADD FOLDER](#)

NOT SUBMITTED	<input type="checkbox"/>	 OFFER FOLDER - BETTY BUYER	ADD DOCUMENT	⋮
OPTIONAL	<input type="checkbox"/>	OH - Contract to Purchase (CABR)	NOT SHARED	  ⋮
LISTING APPROVED	<input type="checkbox"/>	 LISTING DOCUMENTS	ADD DOCUMENT	⋮
APPROVED	<input type="checkbox"/>	Exclusive Right to Sell Listing Contract (CA...	SIGNED	  ⋮
APPROVED	<input type="checkbox"/>	Lead-Based Paint Disclosure - Housing Sales ...	NOT SHARED	  ⋮
APPROVED	<input type="checkbox"/>	OH - Residential Property Disclosure Form	SIGNED	  ⋮

Let's open the Contract to Purchase and see how our fields would autofill.

ROLES

Buyer 1

BETTY B BUYER ▾

Buyer 2

SELECT PERSON ▾

Seller 1

SARAH SELLER ▾

Seller 2

SELECT PERSON ▾

Buying Agent 1

SELECT PERSON ▾

Listing Agent 1

DANA KILCOYNE ▾

Escrow/Title 1

SELECT PERSON ▾

Here you can see that signature fields are assigned to both types of clients. You are still assigned the role of Listing Agent and there is no Buying Agent. You cannot be in a loop twice!

ASSIGNED TO NO BUYING A... ▾

BETTY B BUYER
SARAH SELLER
DANA KILCOYNE
ADMIN FOR SUCCESS MANAGEMENT BR...
NO ONE
ANYONE

ROLE: BUYING AGENT(S) ▾
ADD BUYING AGENT

received the pamphlet *Protect Your Family from Lead in Your Home*.
(check one below):
10-day opportunity (or mutually agreed upon period) to conduct a risk assessment or
for the presence of lead-based paint and/or lead-based paint hazards; or
opportunity to conduct a risk assessment or inspection for the presence of lead-based paint
based paint hazards.

LISTING AGENT: DANA KILCOYNE
BUYER: BETTY B BUYER
BUYING AGENT
BUYING BROKER
ESCROW/TITLE
INSPECTOR
HOME WARRANTY
LISTING BROKER: SUCCESS MA...
LOAN OFFICER

seller's obligations under 42 U.S.C. 4852d and is aware of
reviewed the information above and certify, to the best of their
s true and accurate.

Certification of Accuracy:
knowledge, that the information
By: Sarah Seller
Seller
SE
Seller
Dana Mead
Agent

3WC8-RIVI-PTFS-RKUG
DT
Date

BETTY SIGN HERE
Buyer Date
BUYER SIGN HERE
Buyer Date
NO ONE
Agent Date

We are still fine though - if any document needs you to sign as the buying agent, simply click in the

field that is assigned to the buying agent and re-assign it to yourself in the dropdown at the top of the page. Once you have completed the offer documents, share them with your buyer. As soon as they are signed, you are ready to share them directly with your seller.

You will also need to share the necessary disclosures with your buyer. You can share the original disclosures that you have been signed by your seller, or you can copy the signed disclosures into the offer folders. This technique ensures that you always have an original signed version of the disclosures, just in the case this deal falls through and you need to have your disclosures signed by the next buyer.