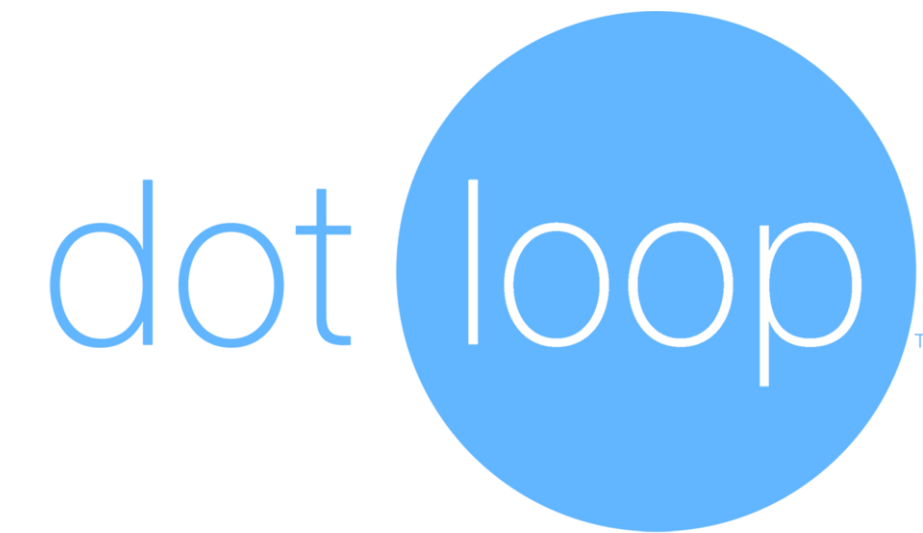


Managing Online Transactions



Brett Pickett

Keller Williams Key Partners

Two crucial elements in conducting a good transaction and providing true *Client/Customer service*:

Accuracy & Speed

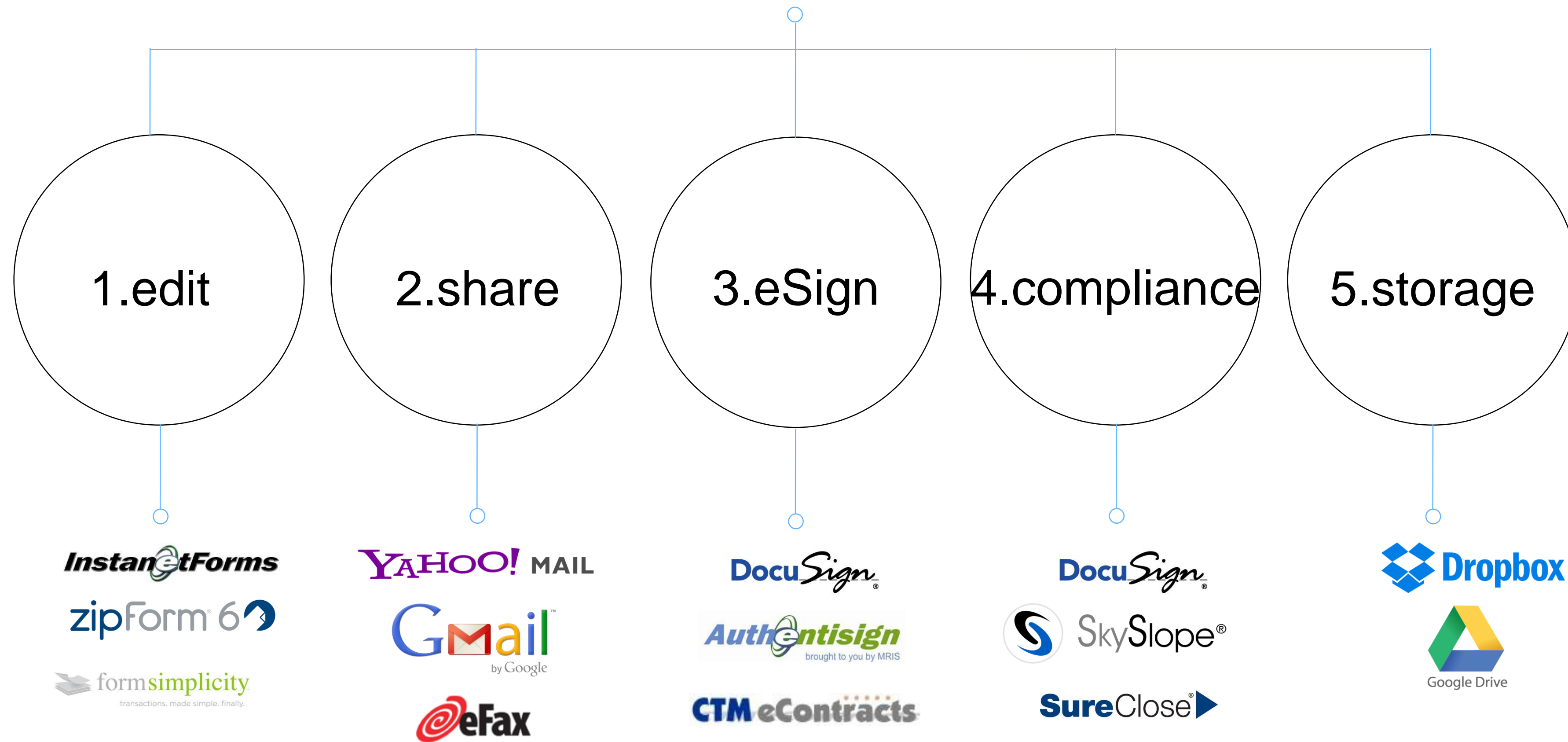
*Whom do you represent?
Put your Clients first
by using the latest technology.*

**Clients deserve efficient, fast confirmations,
and complete conveyance of all documents.**

**In a fast-moving market your Sellers and
Buyers can lose a sale if paperwork and
communication are sub standard.**

managing online transactions

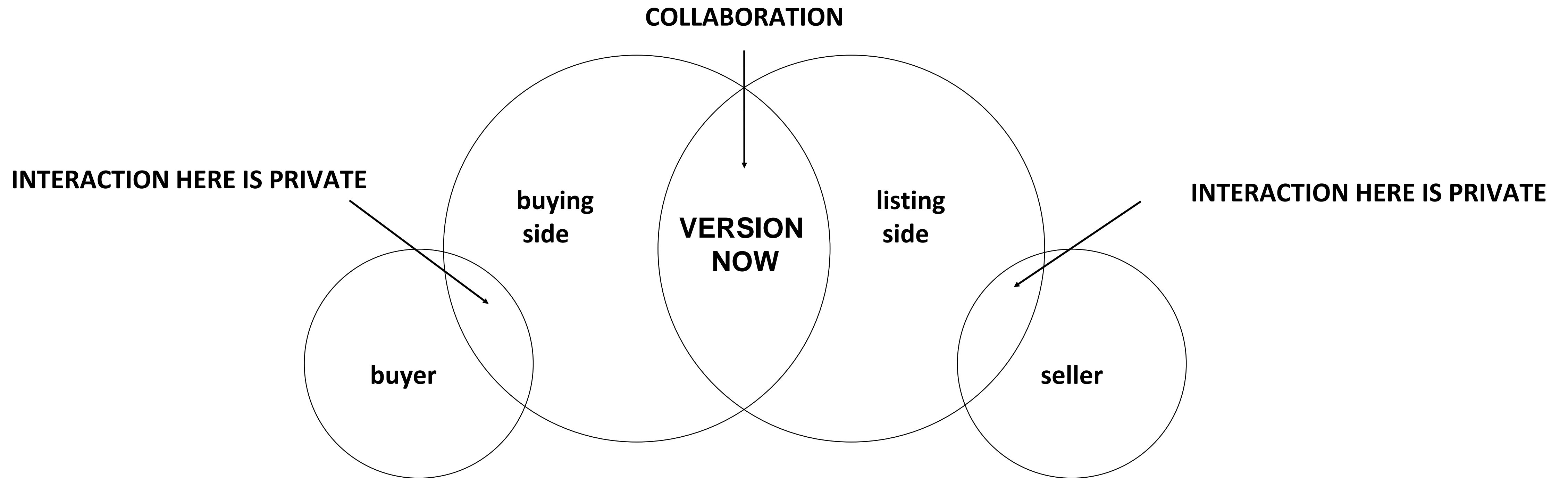
dotloop



navigation

- . How to log in
- . How to attach your brokerage and/or your association
- . Overview of the global navigation bar and homepage
- . Overview of an existing transaction

Essential Client privacy is built in- (privacy 'loop rules')



making an offer

- .Create a new loop
- .Add people and assign roles
- .Add document templates (purchase contract)
- .Open templates and fill out the AutoFill window
- .Check the document to make sure that the signatures initials are assigned correctly

No more, “But you never sent me that addendum!” or “I didn’t get that amendment until the time limit was past!”

making an offer

- Complete your documents and click 'SAVE'
- Return to main page of the loop and upload a PDF
- Edit the PDF, click 'SAVE', and return to the main page of the loop once more
- Show PDF shortcuts (advanced features)

making an offer

- Checkbox your template/s and PDF/s and click 'SHARE' on the right
- In the pop-up, check the box next to your buyer, choose the 'CAN SIGN' privilege, type a custom message and click 'SHARE'
- Close the pop-up and show that the documents are 'waiting on others'

the Client experience

- Open the client's email and click the invitation link to eSign the documents
- Click 'start signing', click in the highlighted initial/eSignature fields, and click 'CONFIRM SIGNING' when complete
- Create a password, it's FREE!
- Show the client's view of the loop and explain some of the client benefits

agent eSignature notification

- After the client eSigns the agent will be notified via email
- The agent may click the link to view the transaction/document, or click to view the eSignature verification (this is the eSignature certificate)
- The certificate can also be accessed by the link that's added to the top left of each signed document

***No more driving across town for signatures-
while another buyer gets YOUR buyer's house.***

eSignature legality

- Here are the Acts that make eSignatures legally enforceable www.dotloop.com/documents-esign
- E-sign Act – Electronic Signatures in Global and National Commerce Act (2000)
- UETA – Uniform Electronic Transactions Act (1999)

collaboration | doc sharing

VIEW ONLY	CAN SIGN	CAN FILL & SIGN	CAN EDIT IN PRIVATE
<p>Typically used with third parties who only need to view download the document</p> <p>Also used to share final version of signed/completed documents back to clients</p>	<p>Allows the recipient (client) to sign documents (*fill-in any text fields that were manually) assigned to the recipient</p> <p>Once the client is done signing, the signed version is automatically shared back to the agent</p>	<p>Makes all fields on a document editable for your client (seller's disclosures)</p> <p>Once the client is done filling out and/or eSigning, the signed version is automatically shared back to the agent</p>	<p>Used to give the agent on the other side of the transaction all of the permissions you have on the document .</p> <p>Once the other agent shares the document/s with their clients for eSignatures, the agent will have to manually share the document back with you.</p>

Collaboration with Co-op

- Share the contract with the co-agent (listing agent) with 'can edit in private'
 - Click the link (acting as the listing agent) to show the co-agent experience
 - Make a change to the document to clear previous signatures
 - Share the document back to the buying agent (you)
- * note, you are skipping the part where the listing agent shares the document to their sellers (it should be explained to the class that this is only for time-saving because they have seen the client signing experience already).*
- Return to the buying agent view (you) and open the document to see changes highlighted in yellow
 - Show document level review history (Version-NOW)

version-NOW

- In short, it means that when you open up a document, you are always looking at the most current revision of that document
- However, all previous revisions are conveniently filed away behind the scenes and are always viewable and/or printable at any time
- For compliance purposes, this ensures that you always have all copies/revisions of all documents (date and time stamped)

Correspondence Records

Keep a good paper trail of what you disclosed, and when~

- Each transaction has a message center where you can take personal notes, send group messages, or send individual messages to anyone you've added to the transaction
- Messages sent from the message center will send an email to the client (or agent/service provider). *even if that person replies via email, the message will be captured in the message center of that transaction
- *The message center is a great way to track correspondence – documents, tasks, people, and messages in one place.

now to the listing side...

**No more paper files to sift through, drop in
a mud puddle, or solve the puzzle of lost
documents.**

No more, “I don’t have that file with me!”

Managing Listings

- Create a new loop and rename the folder to 'listing folder'
- Add listing documents to the listing folder (for training purposes we are fast forwarding in this loop and pretending like the listing documents have been filled out and signed).
- Three steps to make your listings active (searchable) on dotloop
 - Set the loop status to 'Listing for sale'
 - Set the loop status to 'Active Listing'
 - Assign your role to 'listing agent'
 - Add the MLS number and or property address to the details tab

Managing Listings

- Using multiple folders – create a folder for each offer that you receive
- Managing offers that you receive:
 - As a PDF attachment in an email (show email-in)
 - As an offer through dotloop (where the buying agent does NOT link their offer to your listing)
 - Show how to merge the offer into your listing
 - As an offer through dotloop (where the buying agent DOES link their offer to your listing)
- How to setup and use the 'Easy Offer' feature

Back to the Client Experience

Remember to talk to your client/s about how they want to work with you.

Don't assume your clients are comfortable with computers. At the very least, you'll work more efficiently with the co-op agent to best serve your client.

- If you have two clients that share one email, you'll need to explain that each person needs to have an email account in order to use eSignatures (for security purposes)
- You may offer to help them setup an additional email account.

That's it!...