

Session 9 – Technology and Records

After the attendance records, quiz and evaluation have been reviewed by the school admissions office, the certificate associated with the seminar will be posted to the student dashboard at www.KeyRealtySchool.net

Certificates are traditionally posted to the student dashboard at 2PM PST the next business day.

BASIC DOTLOOP

What is Dotloop??

It is simply an electronic folder that is required to be submitted for the office

METHODS OF GETTING PAPERWORK

- Sales and listing packets in the workroom
- Form Simplicity in the MLS
- The office intranet under documents
- E-edge under transactions (most effective)

LOG ON TO KW.COM

- Click on my transactions in the center of the home page
- Start new transactions
- Click on the red + sign or create a loop in list view
- Label your loop by property address

Notes:

Create a loop

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.

NAME YOUR NEW LOOP

SELECT A TEMPLATE

CREATE LOOP

Create a loop

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.

123 Main Street Las Vegas, NV 89101

SELECT A TEMPLATE

CREATE LOOP

ADDING DOCUMENTS

- 3 methods of loading documents
 1. From computer (this is simply grabbing the documents from wherever they are saved on your pc)
 2. From templates
 3. From Email

Notes:

ADDING FROM COMPUTER

- Click on the document you need and add.
- If you have multiple documents in one folder, you can select them all and add
- They will be added to your loop underneath the folder tab

Notes:

powered by dotloop

BACK TO MY LOOPS

ACTIVITY LOG SUBMIT FOR REVIEW

123 Main Street Las Vegas, NV 89101

SELECT TRANSACTION TYPE VIEW DETAILS ADD TAG

Add documents

Anything you add is private until shared.

ADD FOLDER

FOLDER

TEMPLATES

Add an interactive form by selecting one from templates.

DRAG & DROP FILES HERE

BROWSE

Search and add any PDF from your computer into this folder.

ADD DOCUMENT

EMAIL

Attach the files you need to an email and send them directly into this folder.

Setup your trusted service providers

Make sure deals get done right every time.

Add people

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

Add tasks

Use tasks to coordinate activities with others.

LOAD TEMPLATE

Adding from Email

- Click on adding from email
 - This will bring up a grey highlighted area
 - This is the specific email address for this loop
 - Copy the address
 - Go to your email and forward the email to this address (paste in your to field)
 - **ONLY** document goes not text
-

[BACK TO MY LOOPS](#)

[ACTIVITY LOG](#) [SUBMIT FOR REVIEW](#)

123 Main Street Las Vegas, NV 89101

[SELECT TRANSACTION TYPE](#) [VIEW DETAILS](#) [ADD TAG](#)

Add documents

Anything you add is private until shared.

[ADD FOLDER](#)



FOLDER

[ADD DOCUMENT](#)

loop-123MainStreetLasVega-Folder-f4edb923-d5cc-4864-b32b-af34ee0292aaz99268870@upload.dotloop.com

[Copy to clipboard](#)

Setup your trusted service providers

Make sure deals get done right every time.

Add people

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

Add tasks

Use tasks to coordinate activities with others.

[LOAD TEMPLATE](#)

ADDING FROM TEMPLATES

- Click on add from Templates
- All of the templates will appear
- Select the templates you need and add them to the loop
- Once in the loop begin either with the listing agreement or purchase and sale agreement, complete all the necessary fields
- Save when complete

Choose documents to add.

SEARCH

INBOX

SELECT ALL

VERSION NOW FOLDER	<input type="checkbox"/> referral.pdf	PDF
	Updated September 18, 2017	Provided by Keller Willi...
LISTING PACKET (EQUITY SALE)		
LISTING PACKET (SHORT SALE)	<input type="checkbox"/> LIST AGREEMENT EA 9/2017	PDF
	Updated September 18, 2017	Provided by Keller Willi...
BUYING PACKET (EQUITY/RE...		
BUYERS PACKAGE	<input type="checkbox"/> LIST AGREEMENT ER 9/2017	REQUIRED
	Updated September 18, 2017	Provided by Keller Willi...
BROKERAGE REQUIRED DOC...		

COPY

TEMPLATES CONTINUED

- Go back to loop
- Complete all other forms necessary
(information from you main document will automatically populate fields that it knows)

Notes:

MISCELLANEOUS DETAILS

- Label all documents by the correct name
- It is a working file, archive the items not needed
- Multiple functions from the loop
- KEY---FILE HAS TO BE SUBMITTED TO OFFICE
- Dotloop will trigger Pat Sarver that your folder has been submitted for compliance review

[BACK TO MY LOOPS](#)

[ACTIVITY LOG](#) [SUBMIT FOR REVIEW](#)





123 Main Street Las Vegas, NV 89101

[SELECT TRANSACTION TYPE](#) [VIEW DETAILS](#) [ADD TAG](#)

Documents

Anything you add is private until shared.

[ADD FOLDER](#)

NOT SUBMITTED	FOLDER			ADD DOCUMENT
PDF	 10 DUTIES	ADD TAG	SHARE	NOT SHARED 0
PDF	 13 LISTAGR	ADD TAG	SHARE	NOT SHARED 0
PDF	 20 PUROFF	ADD TAG	SHARE	NOT SHARED 0
PDF	 34 COMMINST	ADD TAG	SHARE	NOT SHARED 0

Setup your trusted service providers

Make sure deals get done right every time.

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 Keller Williams Southern ...

[ADMIN](#)

Add tasks

Use tasks to coordinate activities with others.

[LOAD TEMPLATE](#)

File Checklist-ALL FILES

Property Address:

MLS #:

All required items are to be uploaded to E-edge prior to closing. No commission checks will be issued until all items required are uploaded. Remember that all executed documents constitute an open file and must be uploaded into E-edge within 48 hours of execution.

DOCUMENT	REQUIRED FOR:	NAMING CONVENTION
GREEN SHEET	ALL	ENTERED ON LINE
DUTIES OWED	ALL	10DUTIES
CONSENT TO ACT (SAME LICENSEE ONLY)	ALL	11CONACT
REFERRAL AGREEMENT (WHEN REFERRED)	ALL	12REFAGR
LISTING AGREEMENT	L1,L2	13LISTAGR
LAND LISTING AGREEMENT	L3	14LANDLIST
PRICE CHANGE FORM	L1,L2,L3	15PRICHG
SHORT SALE LISTING ADDENDUM	L2	16SSLISTADD
MORTGAGE INFO RELEASE	L1,L3	17MORTREL
NET PROCEEDS TO SELLER (NO REO)	L1,L3	18NETSHT
3rd PARTY LETTER OF AUTHORIZATION	L2	19AUTH3RD
PURCHASE OFFER	ALL	20PUROFF
COUNTER OFFERS	ALL	21COUNTER
ADDENDA (NUMBERED)	ALL	22ADDENDA
PRE-QUAL, COMMITMENT OR POF	ALL	23PROOF
EMD RECEIPT	ALL	24EMDREC
RESIDENTIAL DISCLOSURE	ALL	25RESDIS
AFFILIATED BUSINESS DISCLOSURE	ALL	26AFFBUSS
LEAD BASE PAINT DISC. (BEFORE 78)	ALL	27LEAD
TAX SHEET	ALL	28TAXSTAR
MLS - ER SATUS	ALL	29MLSER
MLS - C OR P STATUS	ALL	30MLSCP
SRPD	ALL	31SRPD
ESCROW INSTRUCTIONS	ALL	32ESCINST
PRE-LIM TITLE COMMITMENT	ALL	33PRELIM
COMMISSION INSTRUCTIONS	ALL	34COMMINST
ADDITIONAL COMMISSION ADENDUM	ALL	35ADDCOMM
SHORT SALE ADDENDUM	B2,L2	36SSADD
CIC KNOW 4-PAGE	B1,B2	37CIC4PAGE
HOA RESALE CERTIFICATE	L1,L2,L3,B1,B2	38RESALE
HOME INSPECTION "WHY"	B1,B2	39HINSWHY
HOME INSPECTION REPORT	L1,L2,B1,B2	40HOMEINSP
HOME OWNER WARRANTY INVOICE	B1,B2,L1,L2	41HOWINV
NEW HOME BUILDER CONTRACT	B4	42NHCONT
NEW HOME BUILDER ADDENDA	B4	43NHADD
NEW HOME BUILDER WALK THRU	B4	44NHWALK
WALK-THRU	B1,B2,L1,L2	45WALKTHRU
MLS - S STATUS	ALL	46MLSS
ACCOUNTING DOCUMENTS	ALL	47ACCDOC

For Office Use Only:

DA #

Commission Check Received Date:

Time:

Agent:

E-edge Complete:

Check Signed:

BUYER AGENT TRANSACTIONS

EQUITY & REO'S B1
 SHORT SALES B2
 LAND B3 NEW HOME B4

LISTING AGENT TRANSACTIONS

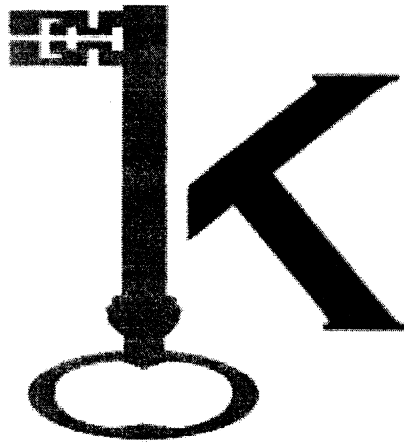
EQUITY & REO'S L1
 SHORT SALE L2
 LAND L3

rev. 12/18/12

ADDITIONAL DETAILS

- You can add documents any time and submit documents at any time (Only submit contract forms, amendments, extensions, etc)
- Benefits of Dotloop??

Notes:



CLASSROOM CONTENT AND INSTRUCTOR EVALUATION REPORT

POSTLICENSING EDUCATION CONTINUING EDUCATION (Check relevant box)

COURSE TITLE: Module C
 CE/POST #: POST.09014-RE HOURS: 3 DATE: _____
 SPONSOR: Key Realty School
 INSTRUCTOR: _____

<u>I. INSTRUCTOR:</u>	<u>Excellent</u>	<u>Average</u>	<u>Not Acceptable</u>
Knowledge of course content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Questions answered/Examples used	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Presented all topics on outline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timely start and finish of class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to control disruptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <u>II. CONTENT/MATERIALS:</u>			
Course objectives/outcomes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization of materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Practical value of content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value of resource materials*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content and materials current	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For "Not Acceptable" rating(s) state your reasons.

1. _____
2. _____
3. _____
4. _____
5. _____

Other comments regarding the course and/or instructor.

1. _____
2. _____
3. _____

Name (optional): _____ Date: _____

* Any supplemental/additional information such as useful websites, case studies, articles from publications, etc.

NOTE: No exceptions to this format without Division's prior approval.