EXPECT BETTER℠

This handbook is intended to be a guide for our standard operating procedures as it relates to file submittal and transaction management in Dotloop. It's purpose is to set expectations, provide detailed information, and keep everyone on the same PAiGE.

This handbook will cover:

CREATING A NEW LOOP:

It's pretty simple to create a new loop, but if you miss one important step (such as selecting a template) you'll have to start all over. So, it's very important to take your time creating your loop. Here are the detailed steps to ensure you correctly create your loop each time.

CREATING & NAMING A NEW LOOP:

Step One: Select the "Create a Loop" button and name your loop! If you are working with clients who haven't gotten an accepted offer on a house yet you can just name the loop with your clients names, the loop name can be changed once you have an accepted offer. Otherwise **best practice is to name your loop with address first followed by your clients last name(s).**

SELECTING A TEMPLATE:

Step Two: Select a template! The most important part. If you do not select a template your loop will not be setup for our workflow. Select a template that best describes your transaction. If you have a dual agency, select listing template.

If you forget to select a template it's not very easy to set your loop up with a final documents folder with placeholders after the fact. **Best practice is to go into your loop, click on the name of the loop. Click it again and it will allow you to change the name of your loop. We recommend changing it to "ADDRESS (ARCHIVED)" or something similar so it is not confused with the new loop you will create. Once you have changed the name of your loop go back into that loop and change the status to archived. This ensures that everyone knows this loop is not the active, working loop.

ADDING PEOPLE TO YOUR LOOP:

After you create your loop you'll want to add your clients. You may also want to add the loan officer, title company, and anyone else you'll be sharing documents with or sending off for signatures. There are two places in the loop that you can add people. The first is on the details page. You can get there by either clicking the name of your loop or clicking 'view details' underneath the name of your loop. You can also add them by scrolling down towards the bottom of your loop under People. When you add someone to your loop the bare minimum you'll need is their full name and email address. You can add as much information as you'd like beyond that. You'll also need to select their 'role' in the loop from the dropdown.

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When you add a person they are not notified that you added them until you share a document with them unless you check the box 'send intro email' when you are adding them. Admin has full access to everyone's loops so you'll never need to add us.

**There are very few circumstances that you'll ever want to check the box next to 'Add to My Team.' This gives that person full access to your loop. They can see everything, make changes and even share it with whomever they'd like. This cannot be undone so it's best practice not to check that box unless you've hired an assistant that needs full access to your loop.

SHARING DOCUMENTS & SENDING FOR SIGNATURES:

Once you have your paperwork all filled out and it's ready for client signatures there are two ways to get it to them. The first is clicking the Share button in the upper right hand corner while you are in the document. The second way is to go in your loop and check the boxes next to each document you'd like to send and click the share button from there. A pop up will appear asking you to select who you'd like to share it with. If you've correctly added your clients and their role in the loop it will automatically assign them to sign the correct fields on each document. Make sure the boxes are checked next to their names and unchecked next to the names of people you don't want to share with. There is a drop down across from each person that allows you to change their permissions with the document. For your clients you'll want to select 'sign only' most of the time. There are certain forms like the SCPD that you'll need them to fill out so in that case you'd select 'fill & sign.' For everyone else you are sharing with you'll more than likely give them the permission 'view only.' It's best practice to check the box 'Attach a pdf' every time you share something, just in case they are struggling to use dotloop.

When you share a document with someone, they only have access to that document. They can't see everything else in your loop. They can download and print the document or send you a message.

Once you've sent a document to your clients to sign you'll see that the document status is now 'waiting for others' and once they have signed it will change to 'signed.'

VIDEO 1
Here is the tutorial video walking you through setting up your loop, selecting a template, prepping your docs, adding people, autofilling, sending for signatures and navigating your loop:

https://share.vidyard.com/watch/ivY3J5c5nMR1zMAVW3v9cV

NEW LISTINGS:

Congratulations on your new listing! Please review this section for an in depth understanding of our standard procedures and timelines for new listings.

PAPERWORK NEEDED:

Absolutely Required to Make Your Listing Live:
- Listing Agreement
- Agency Disclosure
- MLS Input Sheet
- Sign Install Request Form
- Seller Property Condition Disclosure*
- Lead-Based Paint Addendum*

* = We understand there are times when the listing agent is waiting on a last minute initial or signature from their client. If this is the case with one (or both) of these documents, please communicate this when you're submitting your loop and/or in a Dotloop message.

Additional Paperwork Required by the Auditor:
- Escrow Cover Sheet (Filled in with as much information as you have at the time)
- Affiliated Business Disclosure
- Seller Net Sheet(s)
- Wire Fraud Notice

Despite being able to make your listing live without these documents, please remember that they are ultimately required by the Nebraska Real Estate Commision and can be requested during our semi-annual audits. If these documents are not submitted initially, please make sure to submit them within the week of listing.

SIGN INSTALL PROCESS:

To ensure your post and panel are in the ground the same day your listing goes on the market, your sign request should be received at least one business day prior to your list date.

To do this, SHARE your Install Request Form in Dotloop to: SIGNS@BETTEROMAHA.COM

It is crucial that this form is SHARED with the email address above. This is the only way a staff member knows that you have a request. Not sharing your form to this email address can cause

your request to be missed and your install to be delayed. You will receive a message when your request has been scheduled.

<u>Note</u>: Sign installs and removals are not completed on weekends or major holidays.

PHOTOS & DISCLOSURES:

With any new listing **our standard procedure is to upload photos and disclosures prior to the listing going live in the MLS.** Many homebuyers have alerts set up on their phone when new listings go on the market and if you don't have photos for that first alert you risk losing interest early. Similarly, the disclosures provide a great deal of information about your listing. And when your listing goes under contract, the buyer's agent can quickly print your disclosures and have their clients review and sign accordingly. If you need an exception to anything related to the submission of photo or disclosures, please contact us at (402) 932-5989.

Send or forward your photos to: TRANSACTIONS@BETTEROMAHA.COM

It is crucial that the agent sends their photos to the email address listed above rather than sending them to any staff member's personal email. Why? Our transactions email can be accessed by anyone who is taking care of Dotloop/MLS that day - and this can vary depending on schedules. Sending your photos elsewhere can ultimately delay your listing.

SUBMITTING DOCUMENTS FOR REVIEW:

In order to get your listing documents to an Admin, you will use the Final Documents folder to Submit for Review.

To do this you will check the box next to each of the listing documents that are required to make your listing live. From there you will click "Make a Copy" and choose the "Copy as a Flat PDF" option. This option will finalize all the text and signature fields on the document. You will still have dotloop/editable version of the document in your working folder. Then, you will search for your listing loop by typing in the name of your loop. You will be asked which folder within your loop you'd like to place your copies in, choose "Final Documents - Submit for Review".

Now when you look at your Final Documents folder you will see all the copies of the documents you just made. But, you're not done just yet! Make sure to drag each of those copies and drop them into their respective placeholders. What are placeholders? These are the grayed out names of documents within the Final Documents folder.

Why are the placeholders so important? These placeholders make sure that your documents are uniformly named and easy to find. You, any Admin, and the auditor can easily see what has been submitted and what is missing. This increases efficiency because there is no question

whether or not "Disclosure" is code for "Agency Disclosure," "Seller Property Condition Disclosure," "Affiliated Business Disclosure" … or maybe even none of the above.

The final step is clicking "Submit for Review" at the top right hand corner of the page. Check the box next to the 'Final Documents - Submit for Review' folder (this is the only folder you'll ever submit for review.) You'll select 'listing review' from the drop down on the right hand side of the box. Please use the designated space to send a message to us to fully communicate your needs and describe the documents you are submitting so there is no confusion. Click the submit button. Back in your loop you should see the status of the Final Documents folder change to 'Submitted.' This will let you know that you have successfully submitted everything in your Final Documents folder to us.

We will then carefully review all of your executed documents, approving or returning them. If a document is returned you will receive a message in dotloop as to why. We will assign you tasks in the loop for missing documents. You'll receive an email notification from the task until it is completed. You must correctly submit the document needed in the Final Documents folder in order for the task to be marked completed.

VIDEO
Here is a tutorial video on how to correctly submit for review:
https://share.vidyard.com/watch/YkAPEbTKyo15z8KNWVg1vj

TIMELINE & PROCEDURES FOR NEW LISTINGS:

For best practice, submit your listing documents for review at least one business day before the day you'd like it to go live in the MLS.

For example: If you'd like your listing to go live in the MLS on Monday, you'd submit your listing documents for review the Friday before.

However, we understand that things don't always go to plan and sometimes it's the day of before you're able to complete the MLS input sheet, gather client signatures, take photos, etc.

If you can submit <u>all</u> of your listing materials by 3:00 p.m., you can expect your listing to be entered into the MLS that same day. However, if it is after 3:00 p.m., the listing will not be input until the next business day.

<u>Note</u>: If documents are incomplete or missing signatures, this could potentially delay your listing going on the market that day.

AFTER HOURS POLICIES RELATED TO LISTINGS:

Our after hours Help Desk line is (402) 884-4888. A staff member will monitor this line Monday through Friday, 5 p.m. to 8 p.m. and Saturday 10 a.m. to 4 p.m. Please leave a detailed message with your name, the full address, and as many details as possible as to what you need assistance with. A staff member will take care of your request within one hour. If you see that your request has not been taken care of within one hour, contact Tom Simmons at 402-612-7418.

We encourage you to use this line when you have an emergency related to your listing. An emergency is defined as something that absolutely cannot wait until the next business day. Some examples may include, but are not limited to: an incorrect address or price, missing photos or associate documents, etc.

The after hours Help Desk is not for last minute listing input, adjusting remarks, re-arranging photos, or anything else that will not negatively impact your listing.

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LISTINGS UNDER CONTRACT:

Your clients have accepted an offer on their home!

PAPERWORK NEEDED:

Absolutely Required to Update MLS Status:
- Executed Purchase Agreement
- Escrow Cover Sheet
- Status Change Form*

Forgetting any of these documents will result in a delayed status update. Keep in mind the Board requires a status update within 72 hours of an accepted contract.

*Please see FAQs for an explanation on why the status change form is required.

All Required Paperwork:
- Listing Agreement
- Agency Disclosure
- MLS Input Sheet
- Seller Net Sheet(s) (Original List Price & Final Accepted Price)
- Sign Removal Request Form
- Seller Property Condition Disclosure
- Lead-Based Paint Addendum (If applicable)
- Escrow Cover Sheet**
- Purchase Agreement
- Wire Fraud Notice
- Earnest Deposit Receipt from the Title Company
- Home Inspection Contingency Removal (If applicable)
- FHA/VA Addendum (If applicable)

As a best practice we encourage you to make sure all of these documents are submitted within a week of the listing going under contract. At the very, very latest everything should be submitted for review the week prior to your closing date.

**Your Escrow Cover Sheet is important to a number of different people (the admin reviewing your paperwork, the title company, the commission department, and YOU), so it's crucial that it's filled out completely *and* accurately.

Before submitting your cover sheet, please be sure you've included:

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- The <u>full</u> address (house number, street name/direction, street type, city, state, and zip code)
- The correct purchase price, offer date, acceptance date, closing date
- The correct MLS ID # (Note: This is especially important to double check if you cancel/re-listed along the way)
- The other party's information (Note: If the other party is represented by an outside brokerage, then minimal information such as the client name(s) will suffice. However, if they are represented by an agent with our brokerage, please include as much information as possible.)
- As much closing and commission information as possible.

Without all of this information your escrow cover sheet might be returned, which can delay the review of your documents, processing your title order, and/or disbursing your commission payment.

SIGN REMOVAL PROCESS:

To ensure your post and panel are removed by the time the transaction is closed, your sign request should be received at least one business day prior to your closing date.

To do this, SHARE your Install Request Form in Dotloop to: SIGNS@BETTEROMAHA.COM

It is crucial that this form is SHARED with the email address above. This is the only way a staff member knows that you have a request. Not sharing your form to this email address can cause your request to be missed and your removall to be delayed. You will receive a message in dotloop when your request has been scheduled.

<u>Note</u>: Sign installs and removals are not completed on weekends or major holidays.

SUBMITTING CONTRACT DOCUMENTS FOR REVIEW:

Similar to the initial submittal process for a listing, you will use the Final Documents folder to submit your contract documents for review.

To do this you will check the box next to each of your executed contract documents. From there you will click "Make a Copy" and choose the "Copy as a Flat PDF" option. This option will finalize all the text and signature fields on the document. Then, you will search for your listing loop by typing in the name of your loop. You will be asked which folder within your loop you'd like to place your copies in, choose "Final Documents - Submit for Review".

Now when you look at your Final Documents folder you will see all the copies of the documents you just made. A number of these documents will actually take place of the documents you once had in the final documents folder because many of those are missing the buyer(s)

signatures. As you did before, you will drag each of your copies and replace the current documents with the executed document or drag them to their respective placeholders.

The final step is clicking "Submit for Review" at the top right hand corner of the page. Check the box next to the 'Final Documents - Submit for Review' folder. This is the only folder you'll ever need to submit. Please use the designated space to send a message to us to fully communicate your needs and describe the documents you are submitting so there is no confusion. Click the submit button. Back in your loop you should see the status of the Final Documents folder change to 'Submitted.' This will let you know that you have successfully submitted everything in your Final Documents folder to us.

We will then carefully review all of your executed documents, approving or returning them. If a document is returned you will receive a message in dotloop as to why. We will assign you tasks in the loop for missing documents. You'll receive an email notification from the task until it is completed. You must correctly submit the document needed in the Final Documents folder in order for the task to be marked completed.

AFTER HOURS POLICIES RELATED TO LISTINGS UNDER CONTRACT:

Our after hours Help Desk line is (402) 884-4888. A staff member will monitor this line Monday through Friday, 5 p.m. to 8 p.m. and Saturday 10 a.m. to 4 p.m. Please leave a detailed message with your name, the full address, and what you need assistance with. You must also submit required documents via the Final Documents - Submit for Review folder as well. A staff member will take care of your request within one hour. If you see that your request has not been taken care of within one hour, contact Tom Simmons at 402-612-7418.

We encourage you to use this line when you have an emergency related to your listing. An emergency is defined as something that absolutely cannot wait until the next business day. Some examples may include, but are not limited to: pending your listing, adding 'for backup offers only' to remarks and other status related emergencies.

Note: In order for the status change to take place, you MUST have a completely filled out escrow cover sheet, an executed purchase agreement and a status change form in the final documents folder submitted for review. If you are missing any of these documents it may result in a delay of the status change.

NEW PURCHASE CONTRACT:

Your buyers have an accepted offer! Whoo!

PAPERWORK NEEDED:

All Required Paperwork:
- Agency Disclosure
- Buyer Net Sheet(s) (Original Offer Price and Accepted Offer Price)
- Sign Removal Request Form
- Seller Property Condition Disclosure
- Lead-Based Paint Addendum (If applicable)
- Escrow Cover Sheet**
- Purchase Agreement
- Wire Fraud Notice
- Earnest Deposit Receipt from the Title Company
- Home Inspection Contingency Removal (If applicable)
- VA/FHA Addendum (If applicable)

As a best practice we encourage you to make sure all of these documents are submitted within a week of the listing going under contract. At the very, very latest everything should be submitted for review the week prior to your closing.

**Your Escrow Cover Sheet is important to a number of different people (the admin reviewing your paperwork, the title company, the commission department, and YOU), so it's crucial that it's filled out completely *and* accurately.

Before submitting your cover sheet, please be sure you've included:
- The full address (house number, street name/direction, street type, city, state, and zip code)
- The correct purchase price, offer date, acceptance date, closing date
- The correct MLS ID # (Note: This is especially important to double check if you cancel/re-listed along the way)
- The other party's information (Note: If the other party is represented by an outside brokerage, then minimal information such as the client name(s) will suffice. However, if they are represented by an agent with our brokerage, please include as much information as possible.)
- As much closing and commission information as possible.

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Without all of this information your escrow cover sheet might be returned, which can delay the review of your documents, processing your title order, and/or disbursing your commission payment.

SUBMITTING PURCHASE DOCUMENTS FOR REVIEW:

In order to get your purchase documents to an Admin for review, you will use the Final Documents folder to submit your executed contract documents for review.

To do this you will check the box next to each of your executed contract documents. From there you will click "Make a Copy" and choose the "Copy as a Flat PDF" option. This option will finalize all the text and signature fields on the document. Then, you will search for your purchase loop by typing in the name of your loop. You will be asked which folder within your loop you'd like to place your copies in, choose "Final Documents - Submit for Review".

Now when you look at your Final Documents folder you will see all the copies of the documents you just made. Make sure to drag each of those copies and drop them into their respective placeholders. What are placeholders? These are the grayed out names of documents within the Final Documents folder.

The final step is clicking "Submit for Review" at the top right hand corner of the page. On the right, you'll select 'review' from the dropdown. Please use the space to send a message to us to fully communicate your needs and describe the documents you are submitting so there is no confusion. Click the submit button. Back in your loop you should see the status of the Final Documents folder change to 'Submitted.' This will let you know that you have successfully submitted everything in your Final Documents folder to us.

We will then carefully review all of your executed documents, approving or returning them. If a document is returned you will receive a message in dotloop as to why. We will assign you tasks in the loop for missing documents. You'll receive an email notification from the task until it is completed. You must correctly submit the document needed in the Final Documents folder in order for the task to be marked completed.

ORGANIZING/ARCHIVING UNACCEPTED OFFERS:

If a client's offer was not accepted or fell through, you don't need to create a new loop!

You can change the name/address of the loop by clicking the name of your loop. This will take you to the details page. Click the name of your loop again and it will allow you to edit it. You can change the name as many times as you need to. While you are on the details page of your loop you can update your autofill information as well.

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Back in your loop you can archive the documents that were related to the old offer by checking the boxes next to them and selecting archive. You can also add a new folder and put all new purchase documents there.

If the deal falls through later in the process and your final documents folder has already been used and submitted, feel free to create a new loop for the next accepted contract. You can copy the agency and affiliated business disclosure over to the new loop as well so they don't have to sign it again. Check the boxes next to agency and affiliated business, select 'make a copy' and search for your new loop name. **Be sure to change the status of the old loop to archived!

Dual Agency:

Double bubble, eh? Read carefully to understand the unique circumstances that come with representing both the buyer and seller.

PAPERWORK NEEDED:

All Required Paperwork:
- Listing Agreement
- Agency Disclosure - Seller**
- Agency Disclosure - Buyer**
- Dual Agency Agreement**
- MLS Input Sheet
- Seller Net Sheet(s) (Original List Price and Accepted Offer Price)
- Buyer Net Sheet(s) (Original Offer Price and Accepted Offer Price)
- Sign Removal Request Form
- Seller Property Condition Disclosure
- Lead-Based Paint Addendum (If applicable)
- Escrow Cover Sheet
- Purchase Agreement
- Wire Fraud Notice
- Earnest Deposit Receipt from the Title Company
- Home Inspection Contingency Removal (If applicable)
- VA/FHA Addendum (If applicable)

**For a dual agency you will need an agency disclosure initialed and signed by the seller, a separate agency disclosure initialed and signed by the buyer AND a dual agency agreement form signed by the sellers, buyers, you and Tom. You can find the dual agency agreement form in dotloop under Templates then Purchase - Misc. Forms.

As a best practice we encourage you to make sure all of these documents are submitted within a week of the listing going under contract. At the very, very latest everything should be submitted for review the week prior to your closing.

It is standard procedure to keep both the list and buy side in one loop. Please DO NOT create a second loop for this transaction. The only time there should be two loops for one address in our company is if the buyer and seller are represented by two different agents.

You can create a seperate folder for the buyer in the same loop. Both list and purchase documents will go into the Final Documents - Submit for Review folder.

AFTER HOURS POLICIES AND PROCEDURES

The after hours Help Desk line is monitored Monday - Friday 5 pm - 8 pm and Saturdays 10 am - 4 pm. It is not monitored on Sundays. It is to be used for emergencies only. Please see examples of what constitutes an emergency in the sections outlined above.

In order to better assist you we ask that you call the after hours Help Desk line (402)-884-4888 and leave a detailed message. We also ask that you submit all related documents to your emergency via the Final Documents - Submit for Review folder to us. This ensures your request is taken care of in a timely manner. If your emergency has not been responded to within 1 hour please call Tom Simmons 402-612-7418.

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COMING SOON LISTINGS

If you have a listing that you'd like to market but delay processing in the MLS, you will need a Waiver of MLS Benefits form filled out and signed by your clients, yourself and a broker. This form, the listing agreement, and agency disclosure need to be turned into the OABR within 48 hours (timeframe excludes weekends) of the list date. Please make sure to submit these documents for review in Dotloop within this timeframe so that an admin can email this information to the OABR. If you decide that you are going to email the documents yourself, please email them to DAKOTA@OMAHAREALTORS.COM and CC the admin that assists you. If you have any questions about the coming soon process or need clarification you can call our office or reach out directly to the board at (402)-619-5554.

MLS BENEFITS WAIVER:

The waiver can be added to your loop by selecting 'Add Document' next to the folder you'd like to add it to. From there you'll select Templates then Coming Soon Listings. It is titled Seller Acknowledgement Waiver of MLS Benefits.

Option A: You'll select this option when you'd like to market your listing via a sign in the yard, email, mailer etc. but do not want it put in the MLS yet. Once you'd like the listing to go live in the MLS you'll need to submit a new listing agreement.

Option B: You'll select this option when you'd like to put the listing in the MLS but you'd like to delay showings until a certain date. On the MLS input sheet you'll select the status 'No Show' and provide us with an available to show date instead of the status 'Active.' When you are using option B you do not need to send the waiver and listing agreement to the board.

Option C: This option is used to secure the listing but you cannot under any circumstance put a sign in the yard or market the property. An example of when this is used: The sellers are making important repairs to the home and won't list it for a while but you want to ensure during that time someone else doesn't come in and take the listing. Once you are ready for the listing to go live in the MLS you will need to submit a new listing agreement.

FAQs/Troubleshooting Dotloop

What if I'm not near a computer, how can I submit?

The dotloop app is amazing! It has all of the same capabilities as the desktop website version so we recommend downloading it today!

If I accidentally make two loops, what should I do?

So you got a little loop happy? No worries, it happens. You can easily archive any loop that you do not want to use by updating the loop status (an option just underneath the loop name) to "Archived". In addition to updating the loop status, best practice would be to also update the loop name to include "(ARCHIVED)" or "(DO NOT USE)" at the end to make it very apparent that this loop is not being used. See video 1, link on page 3 on how to change your loop name. Please be aware that while you might archive a loop, it will still appear in a search, but again, the loop status will indicate that this is not the loop you're working out of.

Help! I can't find my loop! (See Video 1, link on page 3)

If you're ever unable to find your loop, make sure that your filters are cleared. What filters? On your main Dotloop page (the area that shows a list of all your loops) there's a "Filter" button in the upper right hand corner. Click the button and a number of options appear. Sometimes these filters become marked (without you realizing) and can limit the loops you see. By clicking "Clear All" it will remove all the filters and all of your loops will appear. Please also keep in mind that filters can be helpful, too! They can allow you to search for loops based on their Review Stage, Status, and/or Tags.

There isn't a placeholder for this document but you are telling me I need it. What do I do? (See Video 2, link on page 6)

It's pretty tricky how we require two different cost sheets but there is only a placeholder for one, right!? Best practice is to put your original offer net sheet in the placeholder and when you have the final, accepted offer net sheet just drag it right below the first net sheet. We also recommend clicking the three little dots on the right of the document and renaming it 'Seller Net Sheet - Final' so everyone knows which is which. If there is an addendum or other document that is pertinent to the contract best practice is to just drag it to the bottom of the folder and not worry about putting it in a placeholder.

Why is the status change form required and are my clients required to sign it? (see video 1, link on page 3)

Think of the Status Change Form as a way to safeguard your business! This form can be utilized for a number of different reasons, such as updating the status of your listing in the MLS, making a price adjustment, adding or removing information to your public and/or agent remarks, and so on. A status change form will **always** be required to update your MLS status to pending. Why? There are a number of different ways a transaction can play out and your Admins never want to make assumptions when it comes to your business. As far as obtaining client signatures on your status change form, this is ultimately at your discretion. You are a trusted member of our brokerage, so we trust that any updates to your client's listing is made with their knowledge. However, you are more than welcome to have your clients sign this form for additional confirmation.

I want to clean up my loop and get rid of documents I don't need. What's the best way to do that? (see video 1, link on page 3)

You can archive documents or even whole folders in your loop. Just check the boxes next to the documents you'd like to archive then click the archive button. You can also archive a document or folder by clicking on the three small dots to the right and selecting archive from the dropdown.

Oops! I archived something I shouldn't have, how do I get it back? (see video 1, link on page 3)

One of the (many) beauties of Dotloop is that nothing can ever be deleted or lost forever! Just as easily as you can archive a document, you can unarchive as well. To do this find the button in the upper right hand area of your loop that says "Show Archived". Then scroll down and you will see anything that is currently archived (the names of these documents will appear in grey). When you find the document that you'd like to unarchive, click the three dots that are to the far right on that document's line. There is an option to "Unarchive" and it will make the name of the document appear in black. And just like that, it's back!

An agent from another company shared documents with me from their loop and now I have 2 loops showing up. What should I do?

When someone shares documents via dotloop with you AND you have an account setup with dotloop, you are going to have limited access to that loop (which is why you are seeing it show up on your homepage.) This is why it's very important to name your loop uniquely so you can distinguish which loop is yours. Best practice is to go into their loop and either download or make a copy of the documents they are sharing with you and get out of there. If you make a copy you can search for your loop and the documents will drop right into your loop (same process as making a copy when you are submitting for review.) You can even change the status of their loop to 'archived.'

I uploaded a PDF to my loop, but still need my client(s) to sign. How to I add an area on the document for them to sign?

Open the document that you need your client(s) to sign. Go to the top of the webpage and click "Add". A list of items you can add to your document will appear. Click "Add Signature" and then use your cursor to place the signature box on the area of the document that you need it. If you hover above the box you can choose to "Assign the Field" or "Sign Now". By clicking "Assign the Field" you can assign it to any person who is already a part of your loop, or you can add a new person to your loop. Once you've finished assigning the signature spots to your client(s), you can share the documents as you normally do. When they receive it they will be prompted to sign the signatures fields that have been assigned to them.