

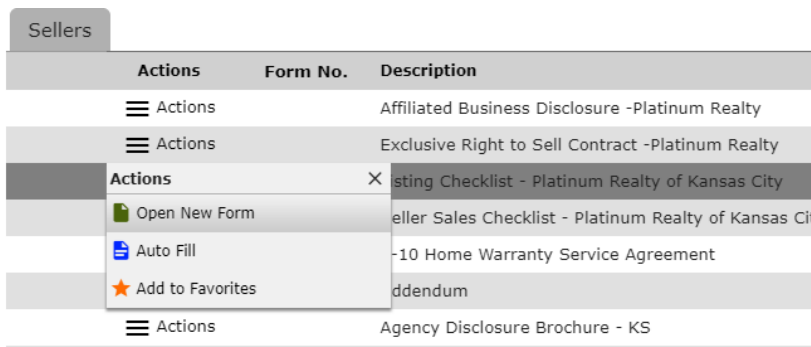
# Operations FAQ

The Operations Team gets asked how to get Platinum Realty forms in Dotloop on a regular basis. This question is often hard to explain over the phone, so please refer to this step-by-step guide to get your documents where you want them. For other answers to questions like this, the [Agent Support Center](#) is a great resource!

## Q: How do I get Platinum Realty forms in Dotloop?

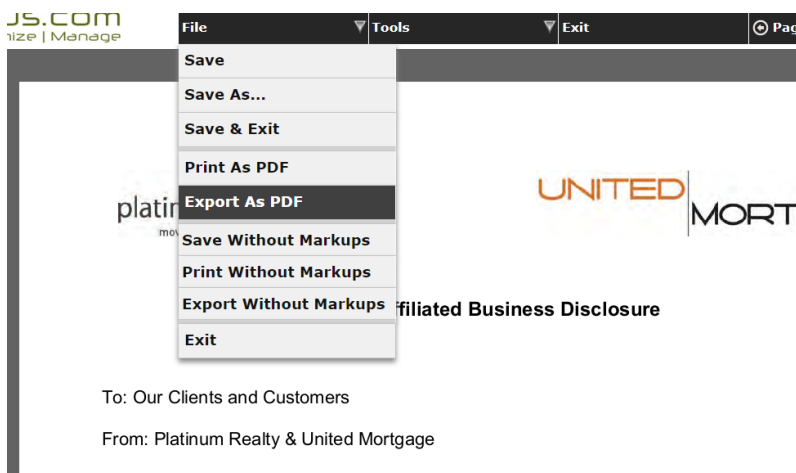
**A: Platinum Realty does not house forms in Dotloop.** All your Platinum Realty Forms can be found on the FormsRus platform. The FormsRus platform does offer an e-signature option, but if you prefer to use Dotloop, the forms are not right there for you to use. The following instructions will explain how you can create your own templates in Dotloop to have your Platinum Forms always at the ready in your preferred system.

**Step One:** Log into FormsRus. Choose Platinum Forms (if you have an option of more than one set of forms.) Download the Buyer Checklist and Listing Checklists, so you know which documents you will need to set up in Dotloop.

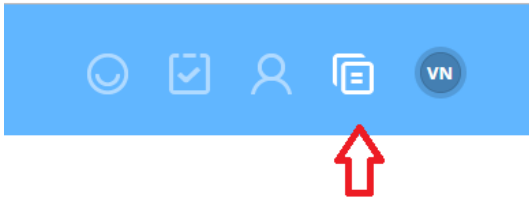


Actions	Form No.	Description
☰ Actions		Affiliated Business Disclosure -Platinum Realty
☰ Actions		Exclusive Right to Sell Contract -Platinum Realty
☰ Actions	X	Listing Checklist - Platinum Realty of Kansas City
📄 Open New Form		Seller Sales Checklist - Platinum Realty of Kansas City
📄 Auto Fill		10 Home Warranty Service Agreement
★ Add to Favorites		Addendum
☰ Actions		Agency Disclosure Brochure - KS

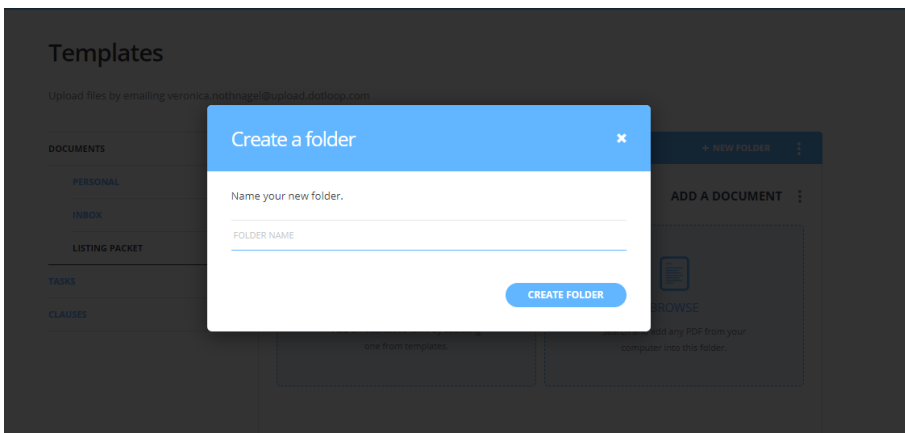
**Step Two:** Download each form you will need for your transactions. Save them to your desktop or a file on your computer. Download by choosing either “Print as PDF” or “Export as PDF” (If you choose “Save” it will just save to a folder within FormsRus).



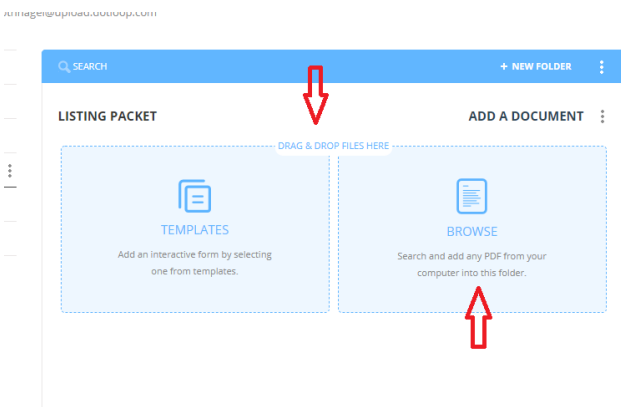
**Step Three:** Once all your forms are downloaded onto your computer, login to Dotloop and select the “Templates” icon from the top right of the page.



**Step Four:** Create a new folder in your templates section and name it “Listing Packet” or “Selling Packet”.



**Step Five:** Drag and drop your downloaded forms from your computer into the template folder or choose ‘browse’ to select the files from your computer.



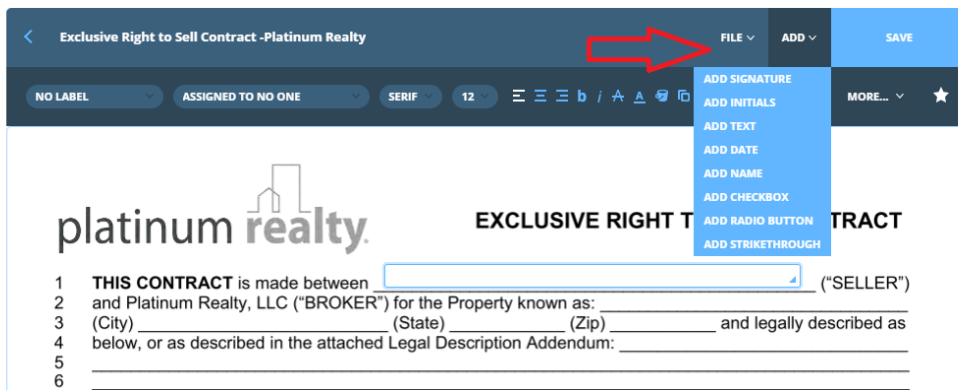
**Step Six:** Your uploaded document will appear below the blue boxes. If you have uploaded multiple documents at once they will show up in a list. You can continue to add documents one-by-one or as a group. If you need to change the name of a document, choose the three vertical dots next to the document name and select ‘edit’.

☐ Affiliated Business Disclosure -Platinum Realty

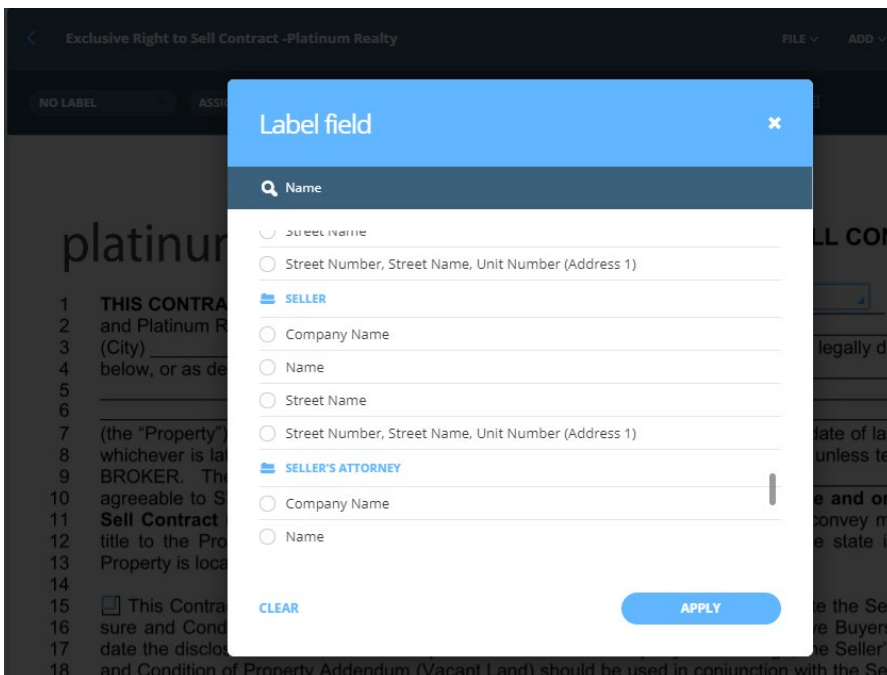
Updated March 30, 2017 Provided by Veronica Nothnagel

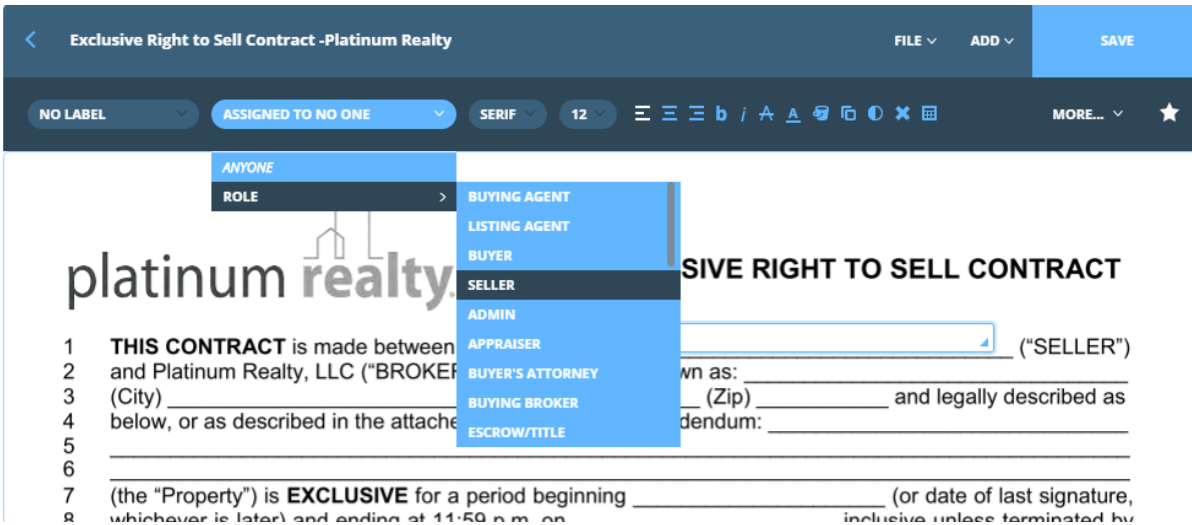
- EDIT
- MAKE A COPY
- DOWNLOAD
- RENAME
- DELETE

**Step Seven:** When you have all your documents uploaded you may start creating your templates. Click on the name of one of the documents you uploaded. At this point you can place text boxes, signatures, initials, dates, names, checkboxes, etc. Choose 'Add' from the menu to choose which item you would like to add to the template.



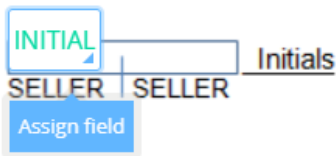
As you add fields, you can add labels and assign the fields to certain roles – Agent, Seller, Buyer, etc. If you are going to fill out the fields yourself, you don't have to assign them. However, assigning them will allow you to autofill your client information when you use the template in the future.



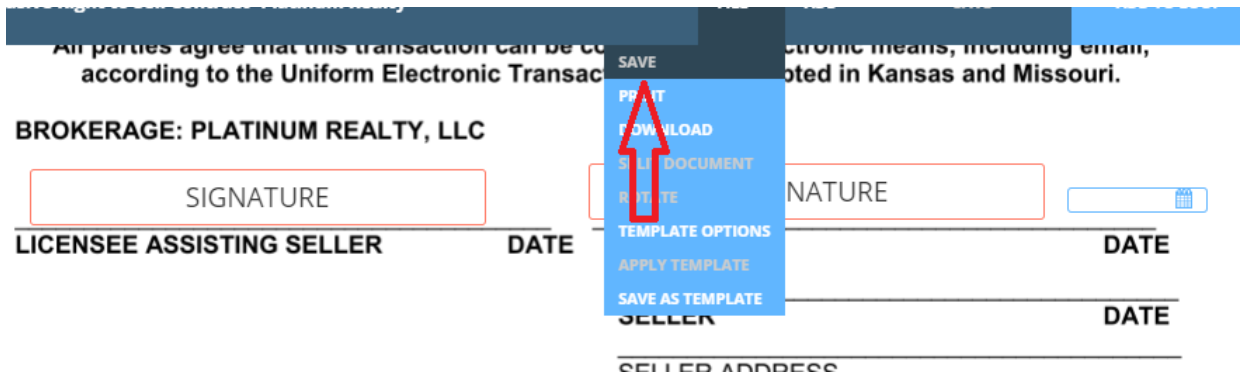


When you add signatures and initials, it will prompt you to assign the field.

net, virtual tours, websites, trade journals  
 | facsimile. Notwithstanding, any of the



Once you have added all of your fields and assigned them to each role, save the document.



**Step Eight:** Repeat this process with each form you would like to be able to access as a template. Once these are all set up and you are ready to do a transaction, choose the document from the file and click “Add to Loop” in the top left corner and proceed to use Dotloop for signatures as you normally would. For further help with Dotloop you can visit their help page or refer to the training videos available on [www.myagentbackoffice.com/dotloop](http://www.myagentbackoffice.com/dotloop).

**Note:** Another option would be to completely fill out the form within FormsRus, download the form and upload it to Dotloop for signatures. If you would like to try the FormsRus e-signature option, you do get 10 free signatures/month. If you plan to use it more frequently, it is just \$48/year. If you want to learn more about using FormsRus for signatures or about any of its other features, please visit <http://www.myagentbackoffice.com/platinum-tv> for tutorials.