Dotloop

For Admins & Managers

Subjects Covered

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Create a Loop
Add Documents from Templates
Add Documents from Computer
Add Documents via Email
Add People to Loop
Sharing Documents
The Review Process
How to Confirm that a Document was Submitted
Jon Describes the Review Process

Tip: Read only the bold font.

What is Dotloop?

Dotloop is an **online workspace** that connects everyone and everything needed to complete a real estate transaction in one place. **Dotloop allows you to edit, complete, sign, and share documents without ever needing to print, fax or email.**

What advantages does Dotloop offer?

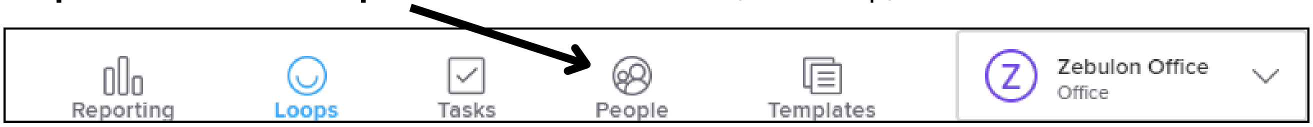
Since all your contract's files will be stored in Dotloop, all these files will be accessible to anyone who needs them. That includes yourself, your client, the admins, the broker, and the accounting department. This also has the benefit of not needing to store so many paper copies, as the copies are accessible from dotloop.com on your phone or computer.

Why do I need to learn Dotloop?

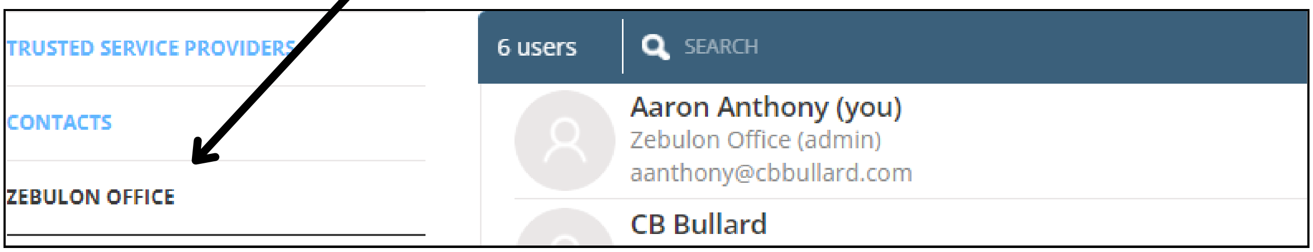
Your broker and the accounting team use Dotloop to review your contract docs, especially the P&S agreement and closing documents. Once learned, you should find that Dotloop improves your workflow.

View & Manage Office Roster

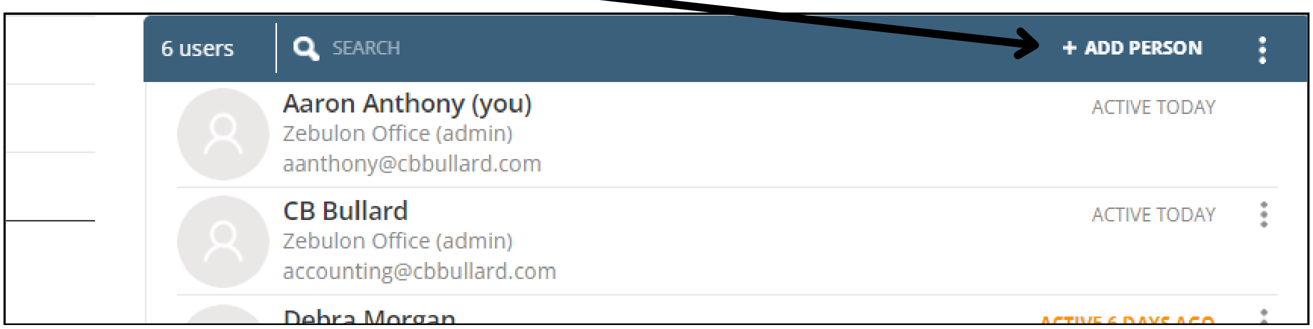
Step 1: Click on the **People** icon in the menu bar (at the top).



Step 2: Click your **office name** (to the left)

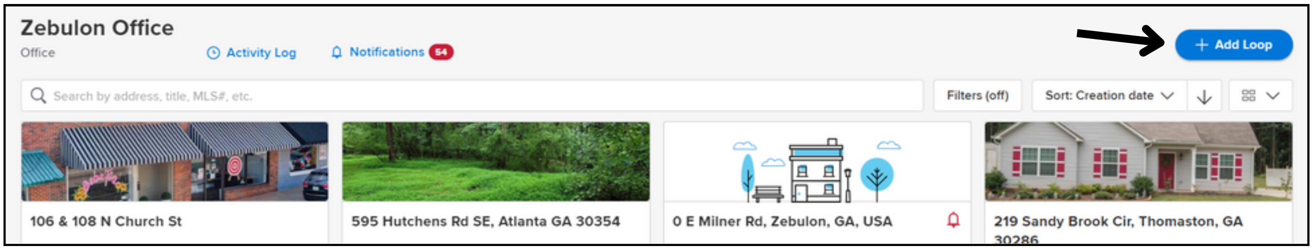


Final Step 3: Click **+ ADD PERSON**

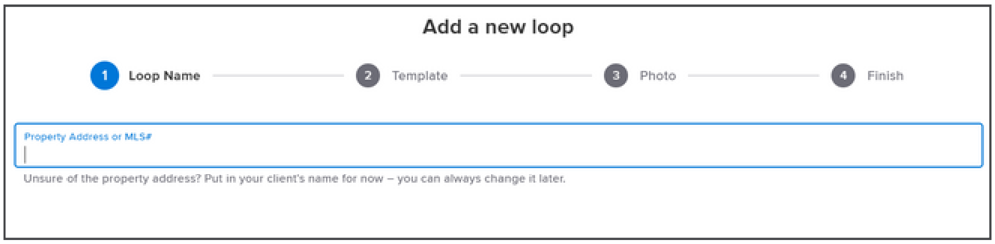


— Create a Loop —

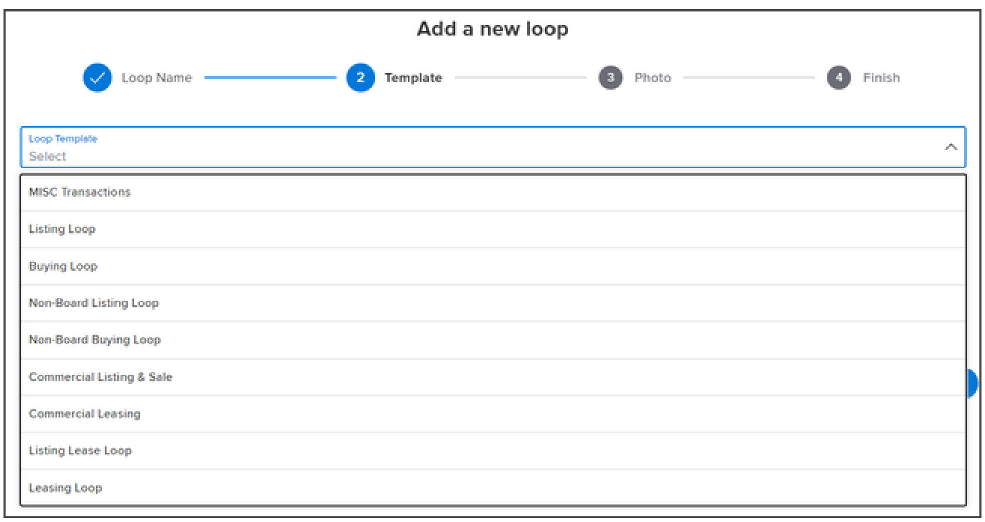
Step 1: Click the blue button **+ Add Loop** in the corner (on the Loops page).



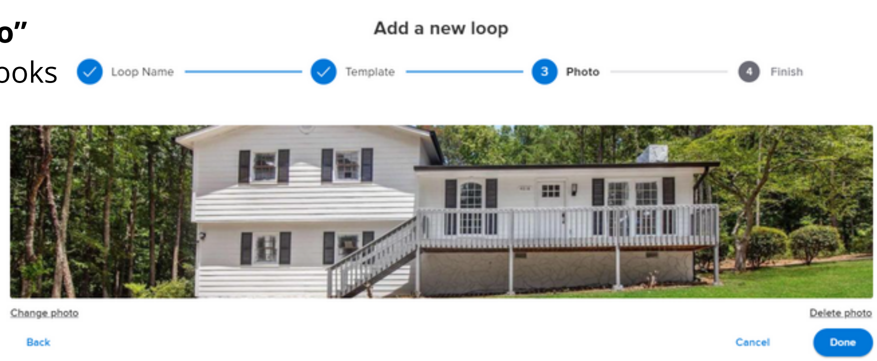
Step 2: "Loop Name" - Use the property address.
Tip: You can link all the property details from MLS if you click on an search result from MLS.



Step 3: "Template" - Usually, you'll pick Listing Loop or Buying Loop.
Templates add all the documents you'll need.



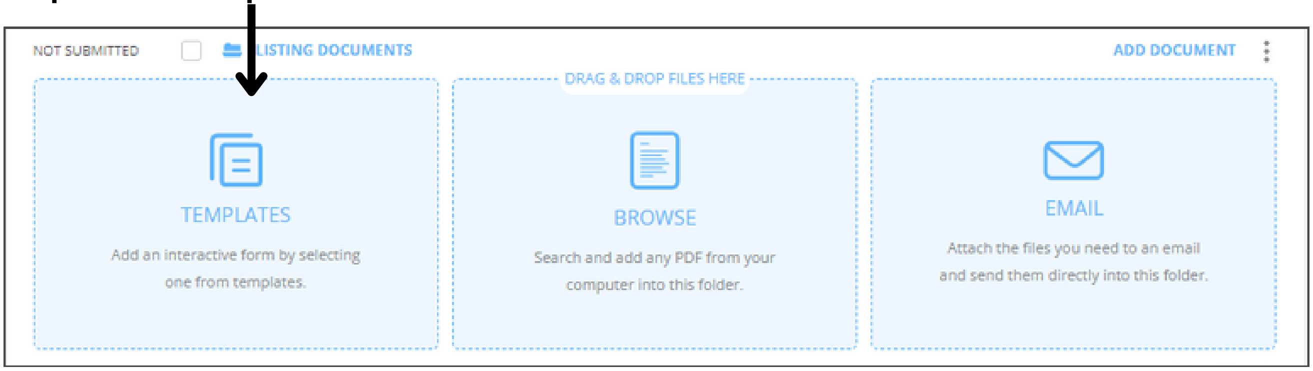
Final Step 4: "Photo"
Not necessary but looks nice.



— Add Documents from Templates —

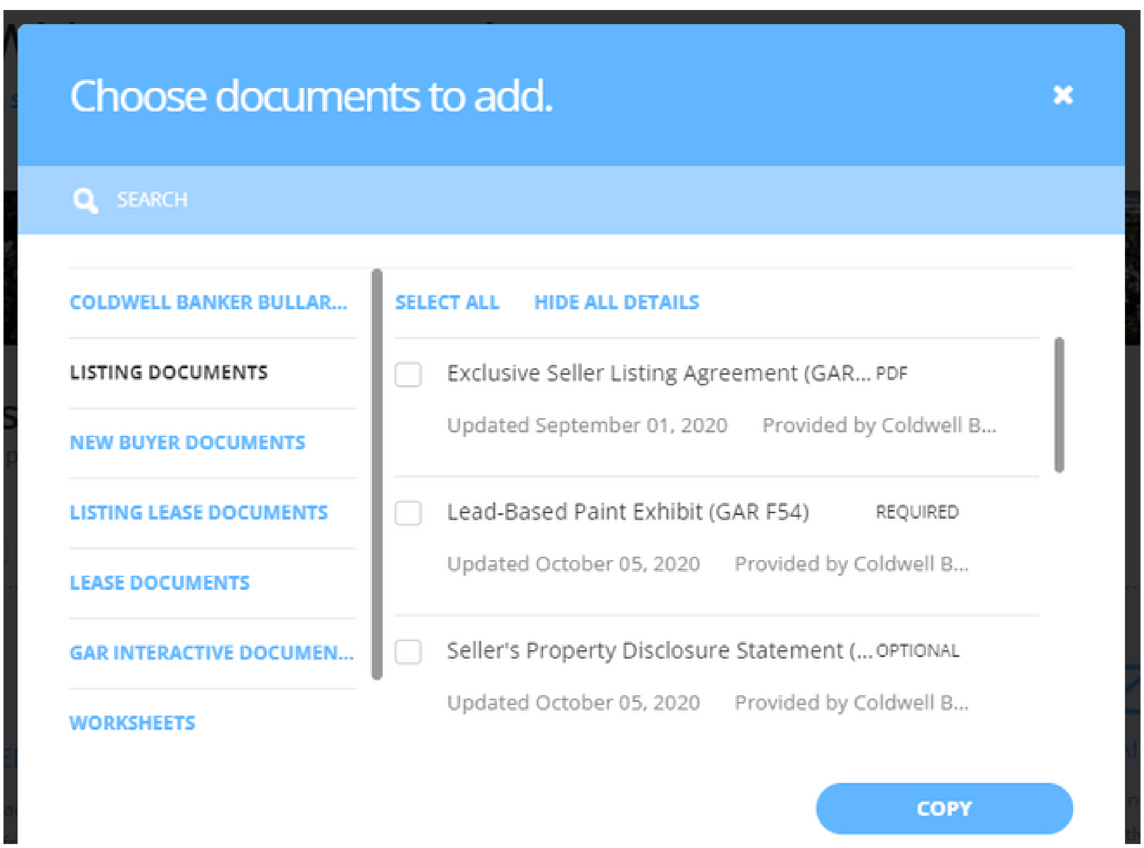
Step 1: Open the loop

Step 2: Click templates



Final Step 3: Find template

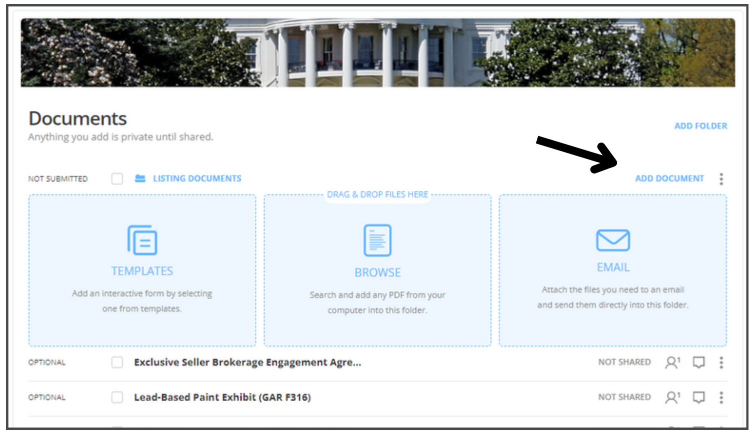
-Folders, left
-Search bar, top
-Documents, right



— Add Documents from Computer —

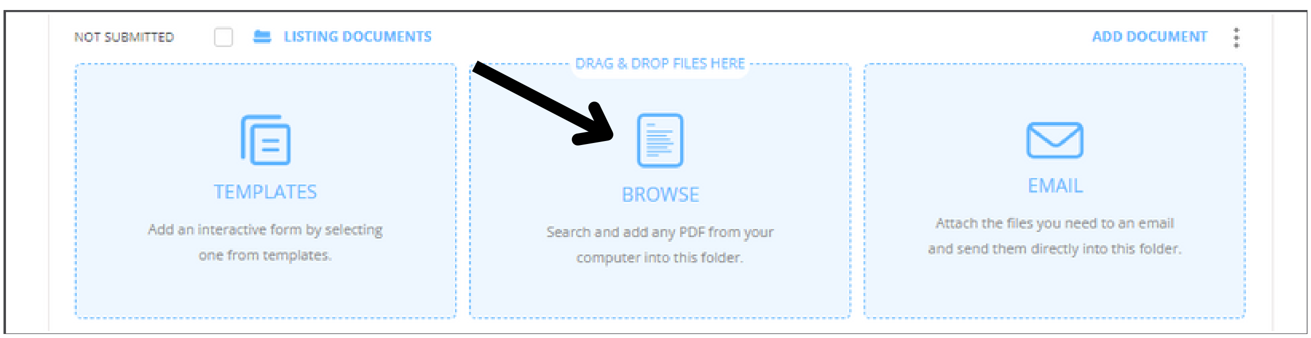
Step 1: Open the loop

Step 2: Click **ADD DOCUMENT**

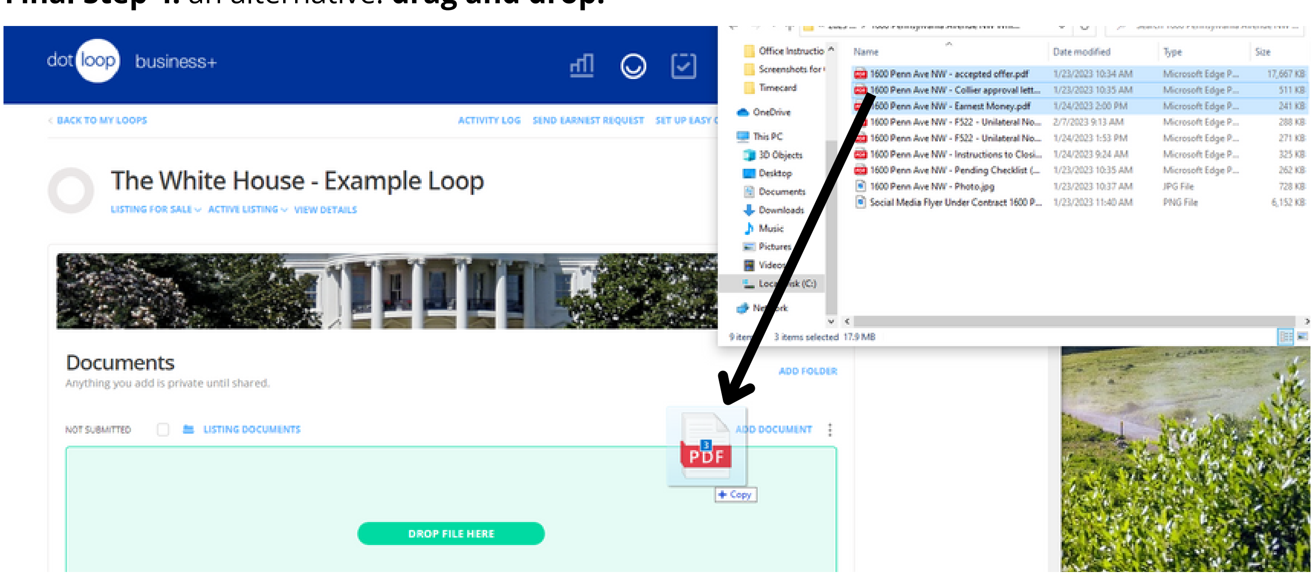


Step 3: Click 'Browse' in the middle

Then navigate your computer's file system and select the files. Maybe what you're looking for is in Downloads or Desktop?



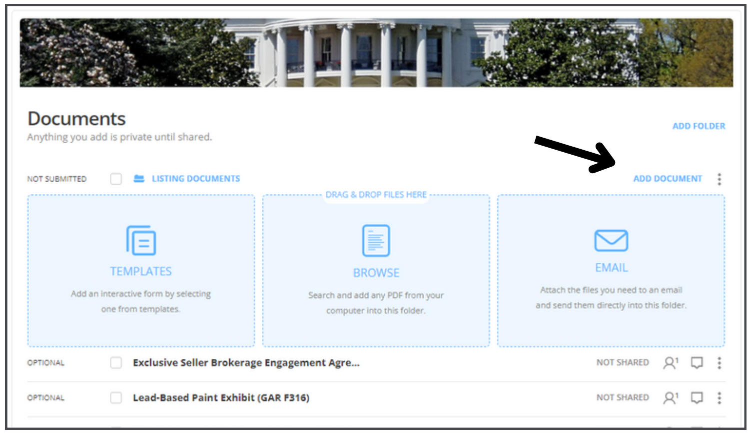
Final Step 4: an alternative: **drag and drop!**



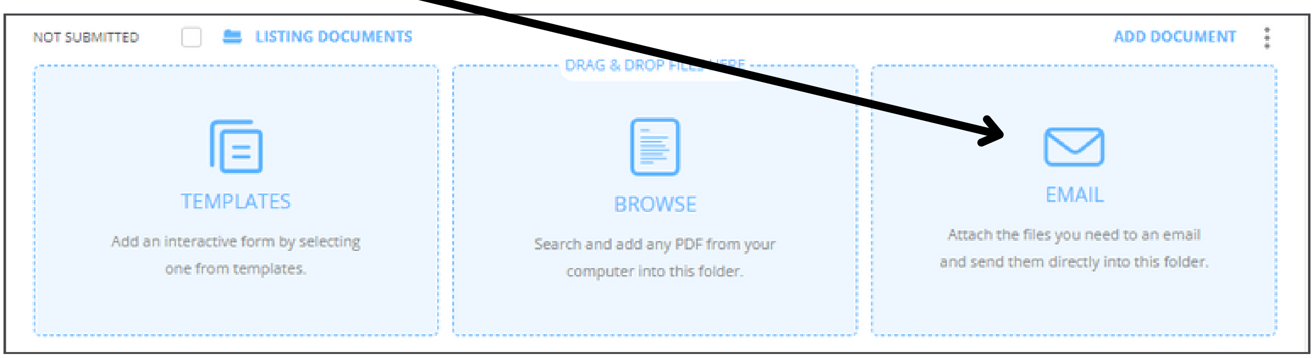
— Add Documents via Email —

Step 1: Open the loop

Step 2: Click ADD DOCUMENT



Final Step 3: Click Email



The instructions state the following:

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

— Add People to Loop —

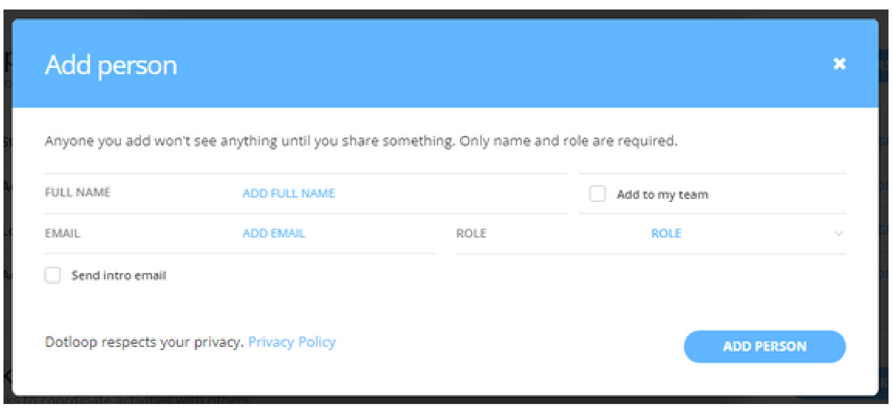
Adding people does not give them access to anything in the loop. It simply allows you to share documents to them. You might add clients and team members.

If you're an admin and you're creating a loop on behalf of an agent, ensure that they soon learn to make their own loops. But for now, you'll have to "add them" to their own loop. So follow these instructions!

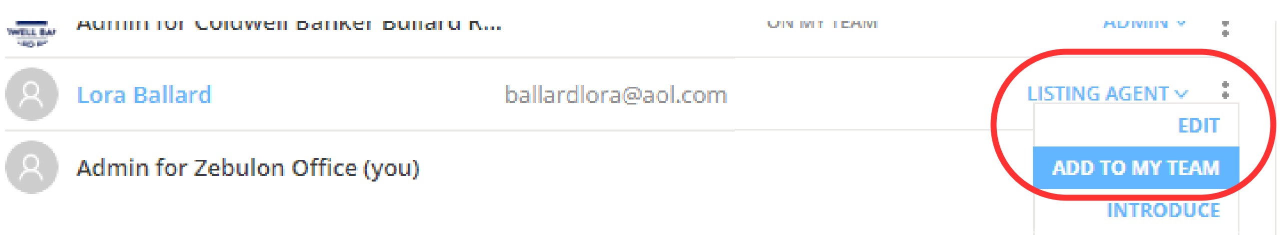
Step 1: Open the loop by clicking on it.

Step 2: Scroll to the bottom & click Add Person. The People section looks like this.

Final Step 3: Click checkbox 'Add to my team' if you want them to have total control over your files. Typically, this is done only if they're your team member.



Alternative way to add to team: click the ••• menu button beside their name.

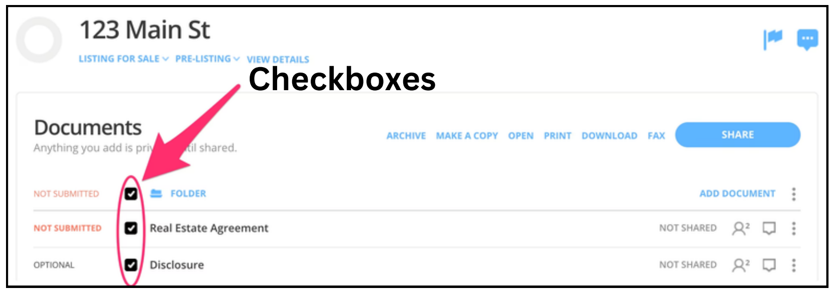


— Sharing Documents —

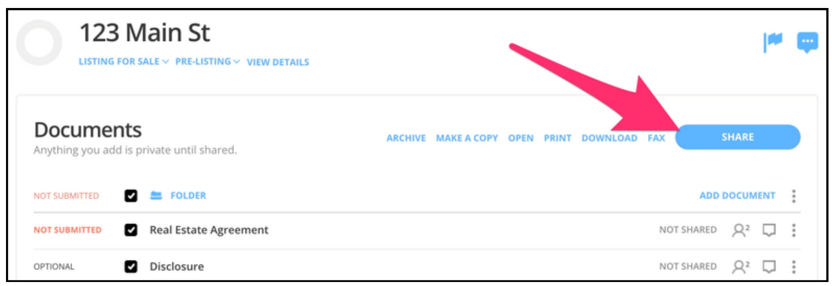
Remember, documents are always private until shared. Documents can be shared individually or in groups. To share documents, open your loop and follow these steps.

Step 1: Select documents

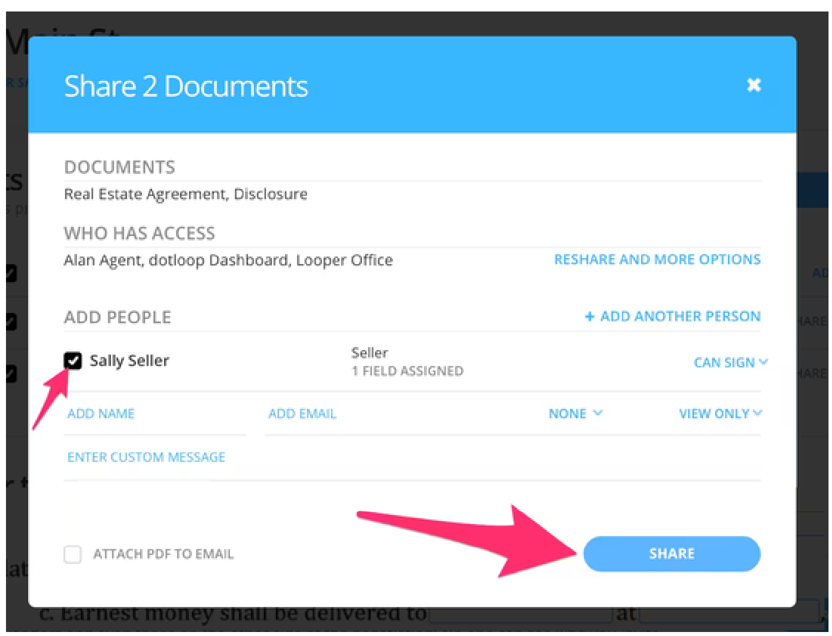
Note: Some documents require different permissions. In this case, select one group at a time.



Step 2: Click the SHARE button



Step 3: Select people to share to, and give permissions.



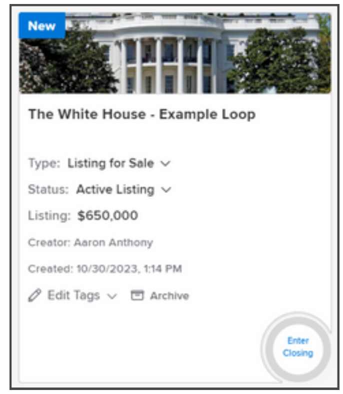
Final Step 4: SHARE

An email will be sent.

— The Review Process Pt 1 —

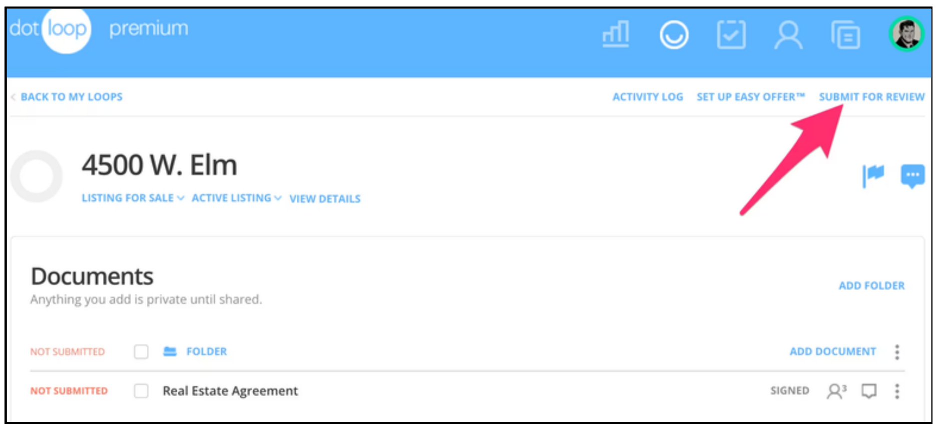
A few easy steps are required for the admin, broker, and accounting office to review your loop and its documents.

Step 1: Open a loop like this one from the main menu.

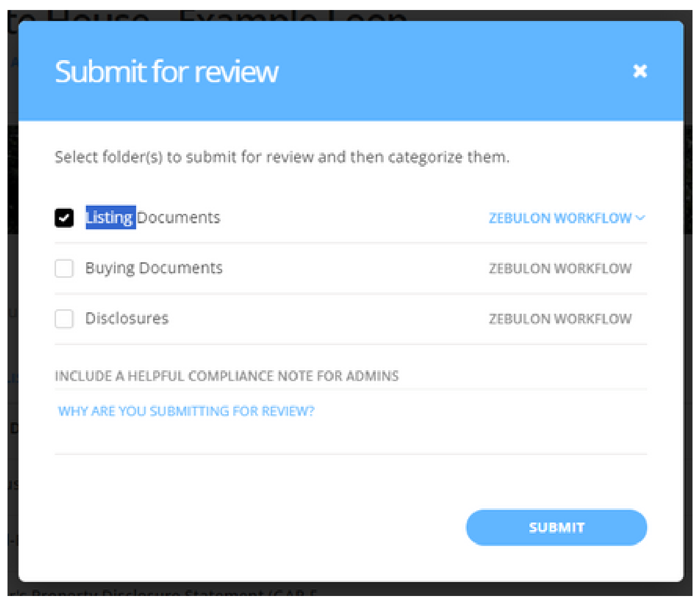


Step 2:
SUBMIT FOR REVIEW

You might be prompted to enter missing details. Enter N/A if necessary.



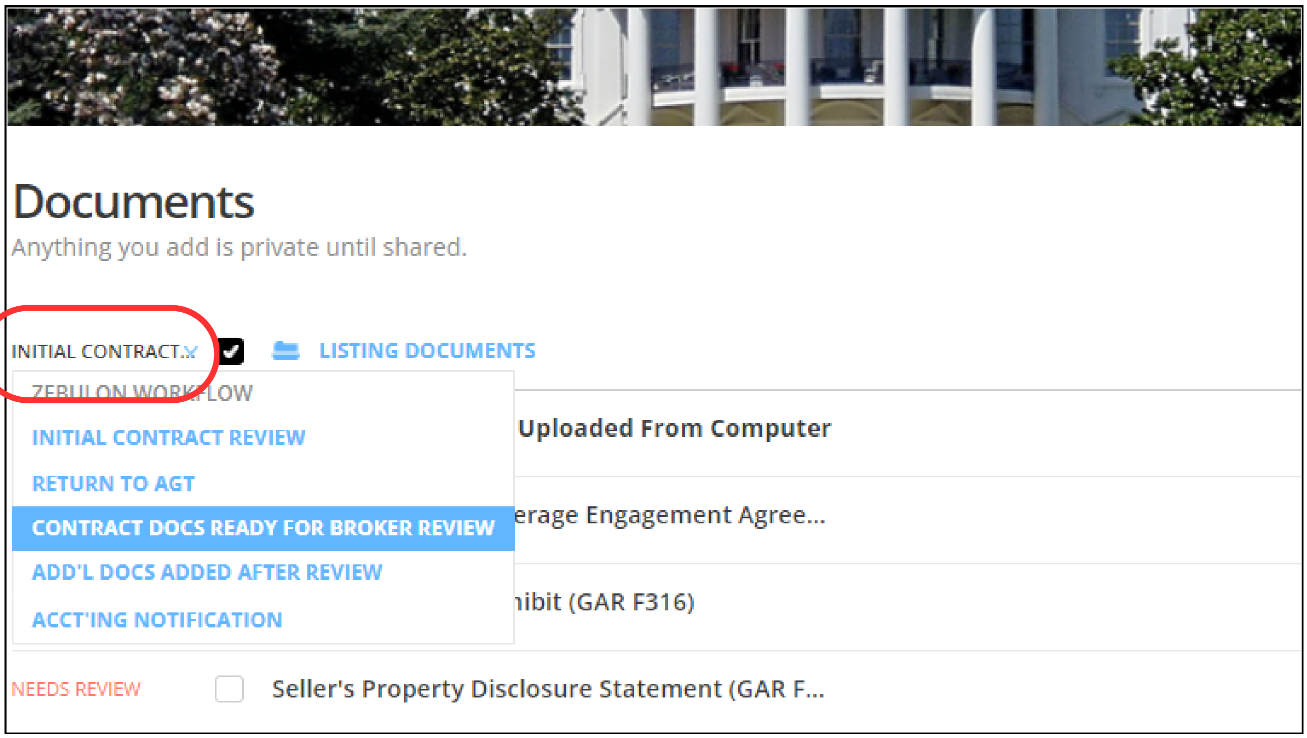
Step 3: Select folders and SUBMIT



— The Review Process Pt 2 —

Final Step 5: Set the review stage

- Agents, do this step after adding documents.
- If you are an admin, then review the documents for errors and set to BROKER REVIEW.
- If you are a broker, then review the documents and set to ACCT'ING NOTIFICATION

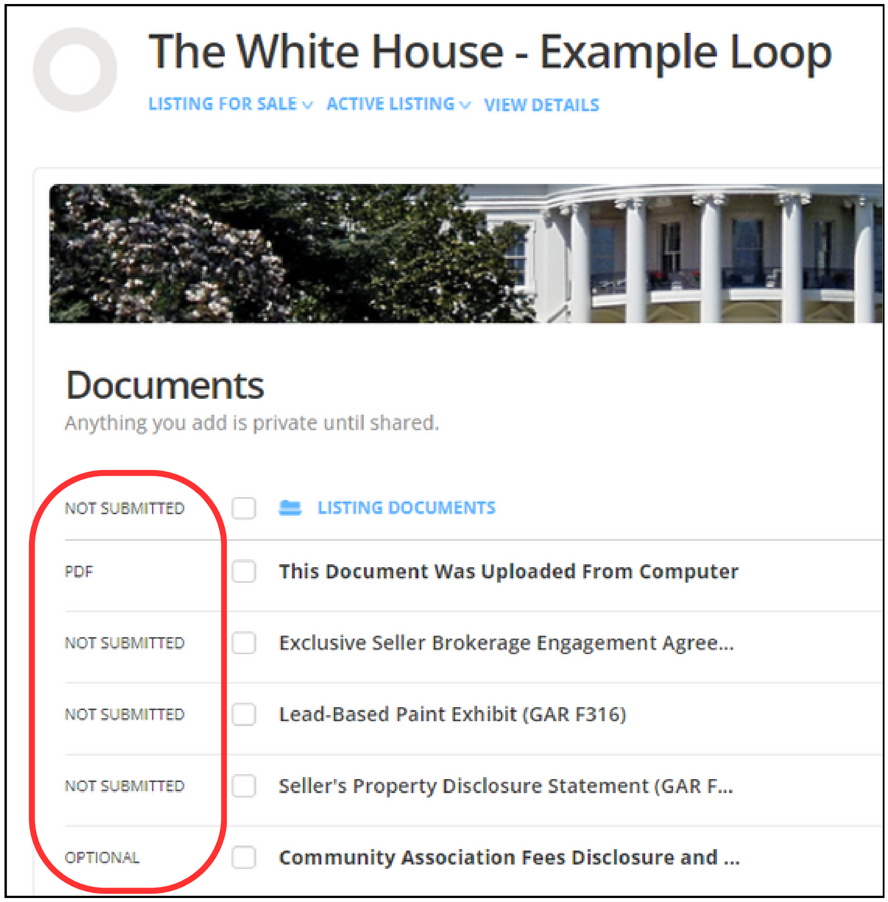


REVIEW STAGES

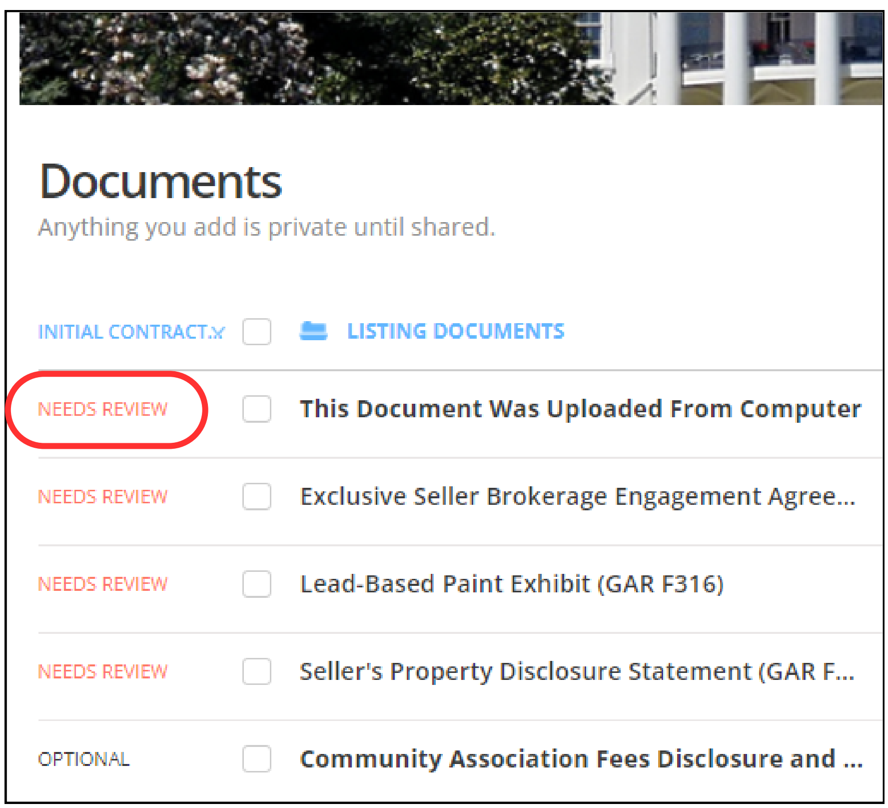
1. Initial Contract Review - first step, admin is notified, reviews docs before broker
2. Return To Agent - for when admin or broker finds errors, it should notify the agent
3. Broker Review - second step, when admin is finished review, broker is notified
4. Add'l Docs Added After Review - for agents who have added documents
5. Accounting Notification - third step, when broker is finished

— How to Confirm a Document was Submitted —

Check the left side.



Unsubmitted documents say "NOT SUBMITTED" or "PDF"



Submitted documents say "SUBMITTED" or "NEEDS REVIEW"

— Our Review Process As Described By Jon —

Here, Jon Morris describes the procedure for Dotloop files in this copy of his email. Basically, **the process goes from agent, to admin, to broker, to accounting.**

10/27/2022
Good Afternoon. Please read this email, maybe refer back to it if you need. You may have already noticed that we made a slight tweak on the process of loops – a test loop has been run and all should work correctly now.
I'll outline the process below so that we can all be on the same page.

1. It all starts with the agent (or admin - we all know it's the agent's paperwork and they should be responsible for getting it to you in the system that the we use for this purpose)
2. Once the agt hits submit for review, ONLY the admin for that office will be notified that the loop is ready for review.
3. Admin is expected to view the documents for completion (just making sure it is there and nothing obvious needs attention that would make it pointless to send on or whatever instructions your Manager has provided)
4. Admin should not "Approve" any docs. (the red bar) Once the office admin views the loop and peruses the docs they then change the status of the folder to "Contract Docs Ready for Broker Review"
5. At that time the Broker will get notified that this this loop needs their attention. They should approve, comment on, or return docs as needed (the red bar). Once the broker is sufficiently satisfied with the contract the Broker should set the stage to "Acct'ing Notification"
6. ONLY "Acct'ing Notification" status will notify Julia, Lauren, and Jon. The contract does not have to be perfect to send it on and certainly keep in mind that we can't match earnest money to a contract without knowing the contract exists.

HINT: You can set it to acct'ing notification for a second to alert acct'ing that this contract exists and then change the status to a previous stage (like Return to Agt). For example, if a contract has earnest money, but there are glaring training opportunities that need to be addressed with the agent you can still notify acct'ing and let the system help you coordinate the corrections needed.   A note to "CB Bullard" also gets delivered to the accounting email.

A couple other notes:

- If anyone hits "Submit for Review" while the loop is in "Acct'ing Notification" status the admin & broker will get notified. This would be for amendments, corrections, or other docs that typically follow the pending agreement. Once re-approved the loop should be set back to acct'ing notification so that acct'ing is aware of the change (even if it has no effect on the commission, we'd rather get it and not need it, than not get it at all).
- If a loop is in "Return to Agt" status when the loop is re-submitted it returns back to "Initial Contract Review" but the admin and the broker are notified the second time (this can change per office if you prefer).
- You have all heard me preach about this, but those that are doing the agent's work on Dotloop may need to take special care that the process flows smoothly. The system is not designed for admins to be the start of the workflow process, but as long as the status matches above things should work correctly.