dotloop admin manual

dot loop

peoplework, not paperwork®

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introduction:

Welcome to dotloop! We know you're excited to get started, so let's begin with a high-level overview of what dotloop is, why agents are so excited to use it, and why their customers are asking for it.

What is dotloop?

As software, dotloop is an online workspace where over 700,000 real estate professionals share and sign documents, collaborate, communicate, monitor, and manage the entire transaction start to close.

As a company, we believe in working better, together. We call this better way of working Peoplework, because it focuses on providing a user experience that creates lasting impressions as well as streamlined results. Once you start looping, you'll know what it means to be a Peopleworker.

What is a loop?

In dotloop, every transaction starts with a loop. A loop is a place where you store everything relevant to a transaction. If you're coming from pen and paper, think of a loop as the file folder you are used to storing documents and information in for each transaction.

Everyone and everything is welcome in the loop – no limitations – making it perfectly simple to collaborate and close a transaction. No loose ends, no missed details.

A loop is also safe and secure. Your data is encrypted and stored in the cloud. You'll never have to worry about losing something critical, knowing your files are safely stored in the cloud.

What is dashboard?

Dashboard is an administrative profile on dotloop that displays all of the loops that your agents have created. It allows brokers, managers, and admins to log in from anywhere and perform a paperless review of all transactions. When everyone is on dotloop, processes are streamlined and paper files are a thing of the past!

Success tips:

tip 1: Being paperless starts here. Please consider NOT printing this manual. It has many color screenshots that make it an easy read, but a nightmare for your office printer! For a more detailed look into the agent features of dotloop, reference the agent training manual.

Tip 2: We will teach you how to review transactions (loops) on dotloop, but you will have specific processes that will develop outside of this manual. Be sure to document exactly how you will use the different features of dotloop so that you can relay the instructions and expectations to your agents.

Tip 3: dotloop is optimized for the latest two versions of all internet browsers, so a good place to start is ensuring that you have the latest version of your preferred browser downloaded. If you have issues with dotloop and your browser, we always recommend you work in Chrome.

Tip 4: Have fun! Once you start looping, you'll wonder how you ever got along without us!

Tip 5: If you ever have questions, let us help you. In addition to our online videos and email support, we offer live phone support to our valued users 7 days a week! When you call in, make sure you have your member ID handy. As a dashboard user, you'll jump to the top of the line once you enter your unique member ID.

Contact support

support.dotloop.com
513.257.0551
Monday- Friday: 8am – Midnight EST
Saturday-Sunday 8am – 8pm EST

don't forget your member ID

overview:

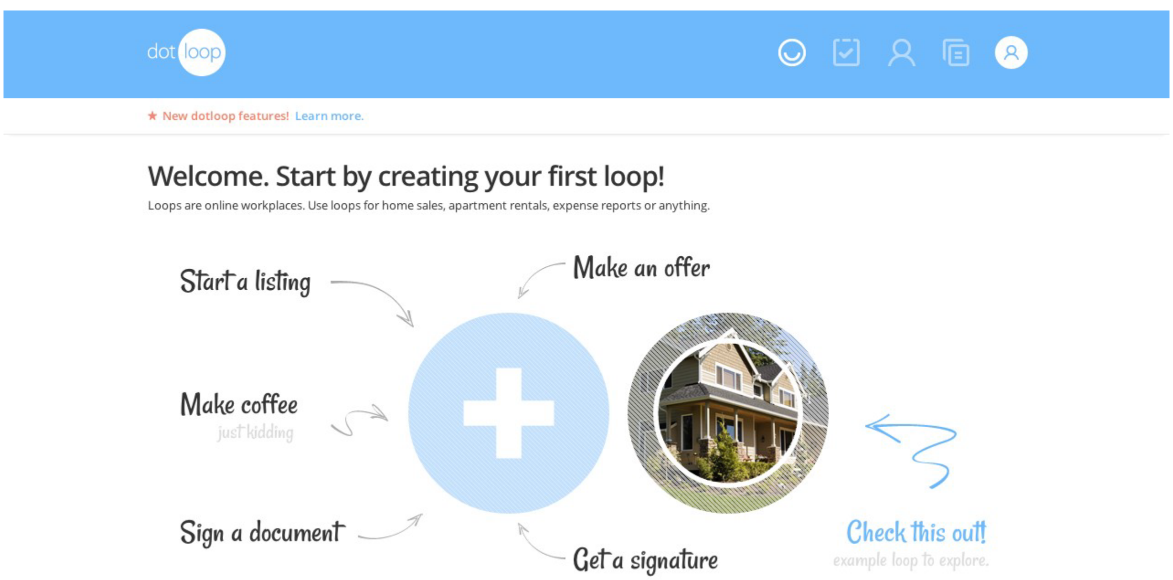
In this manual, we will focus solely on what you and your agents need to know to take your file submission and review process online.

A good starting place is to look at how an agent submits a completed file for review. In this scenario, we are not concerned with where the agent filled out the documents or how they had them signed, we only care that they are compiling the necessary documents in dotloop and submitting them for review. We call this the 'agent basics'.

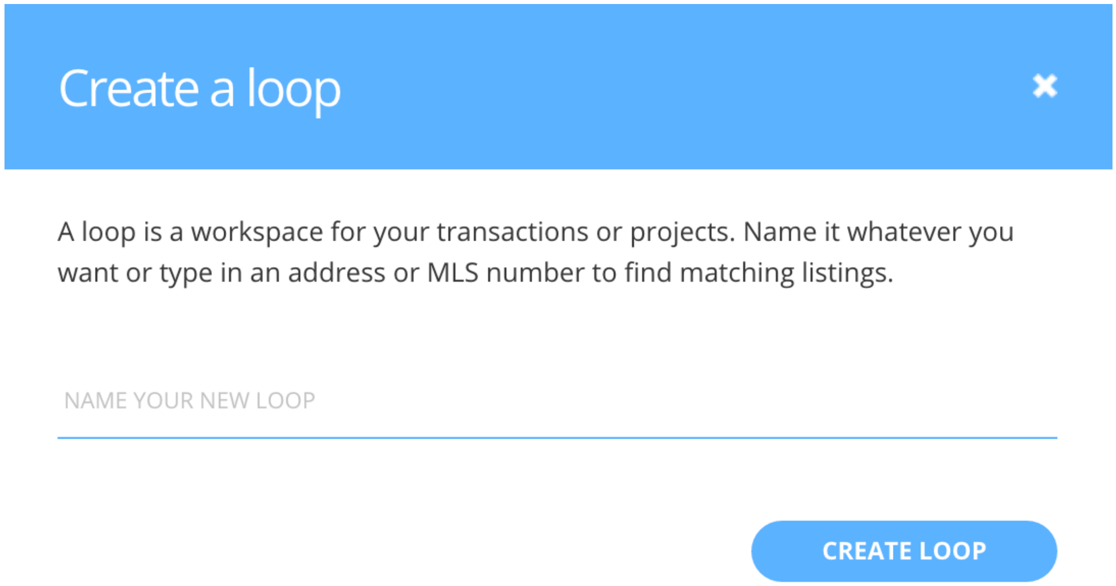
Although we are jumping right into how the system works, you will want to reference the success planning and setup sections for more tips, dashboard setup information, and launch considerations.

Agent basics:

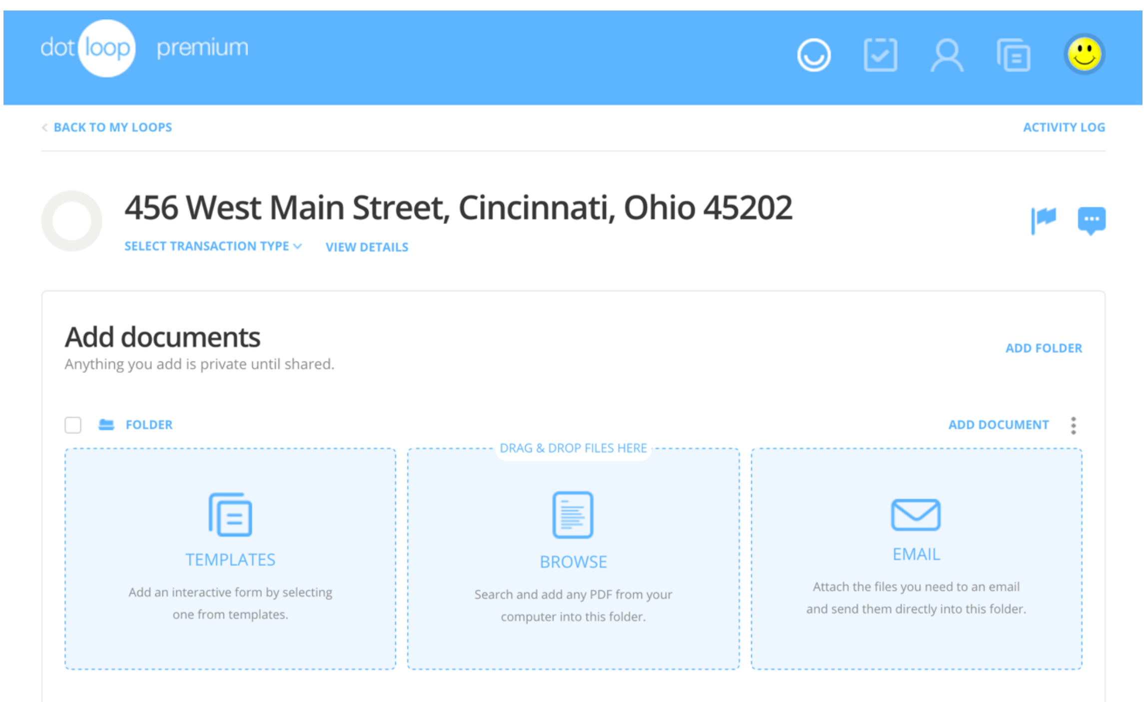
Imagine a traditional paper transaction that your agent has organized into a manila folder in order to drop it off on your desk. Or, maybe they've uploaded their transaction documents as an email so they can send them to you for review. You'll see that the same principles used for those methods are at work on dotloop.



In order for an agent to submit their completed transaction via dotloop, they will first need to create a loop by clicking the '+' sign in the big blue circle. *Notice: this step is like grabbing a new manila folder, or clicking compose in an email.*

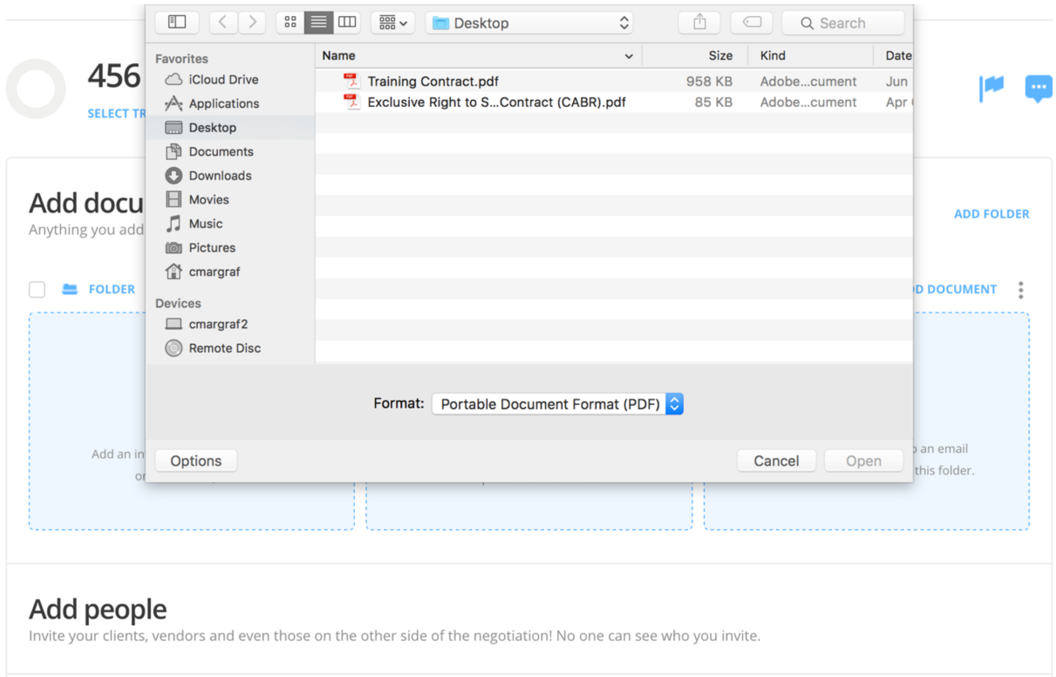


Next, the agent gives the loop a custom name and clicks: **Create loop**. *This is similar to adding an email subject line or manila folder heading, so think about how you will want your agents to name their loops and make sure to communicate these details to your agents.*

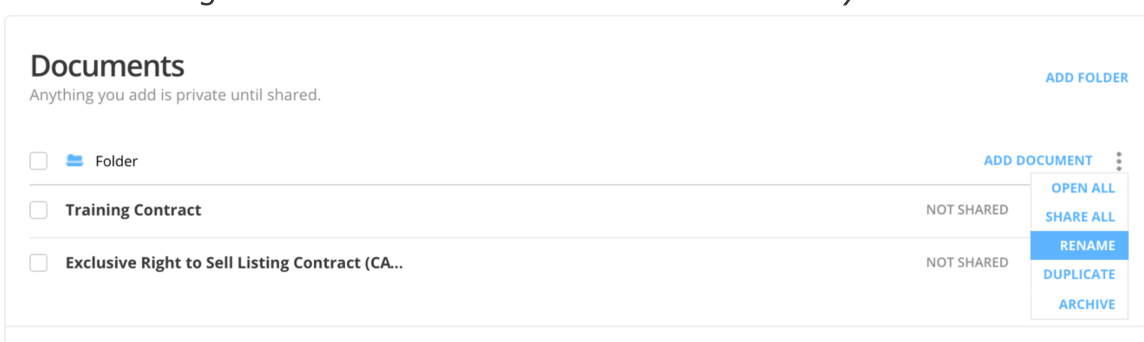


In the documents section of the loop there will be a folder with three options for adding documents. If documents are saved to the agent's computer, they will click **BROWSE**. The second option, **TEMPLATES**, is used if theagent is going to fill out documents and manage their transaction from start to finish on dotloop. The third option allows agents to forward PDFs directly into aloop folder from their email, eliminating the need to save scanned documents to their computer for upload into dotloop. For now, let's click the first option, **BROWSE.**

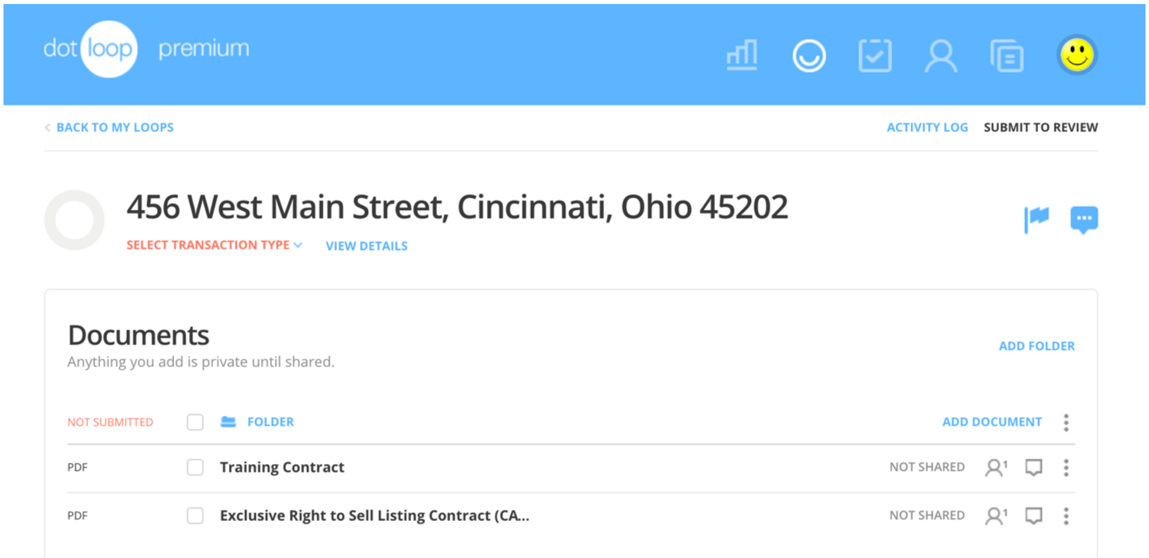
How did the documents get onto the agent's computer? Great question! They can scan documents to their email and then download them, or they may exist in their email already, in which case they would download them as well.



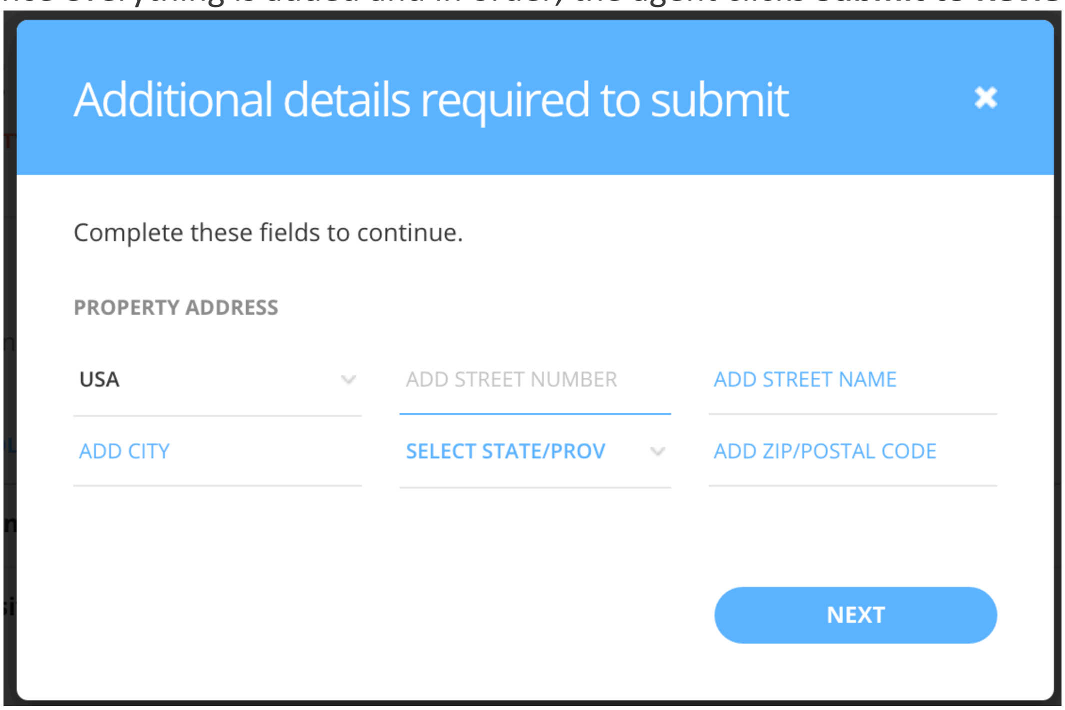
After clicking **BROWSE**, agents will select PDF documents and click **Open**. *Notice: this is the same process as adding an attachment to an email – it's that easy!*



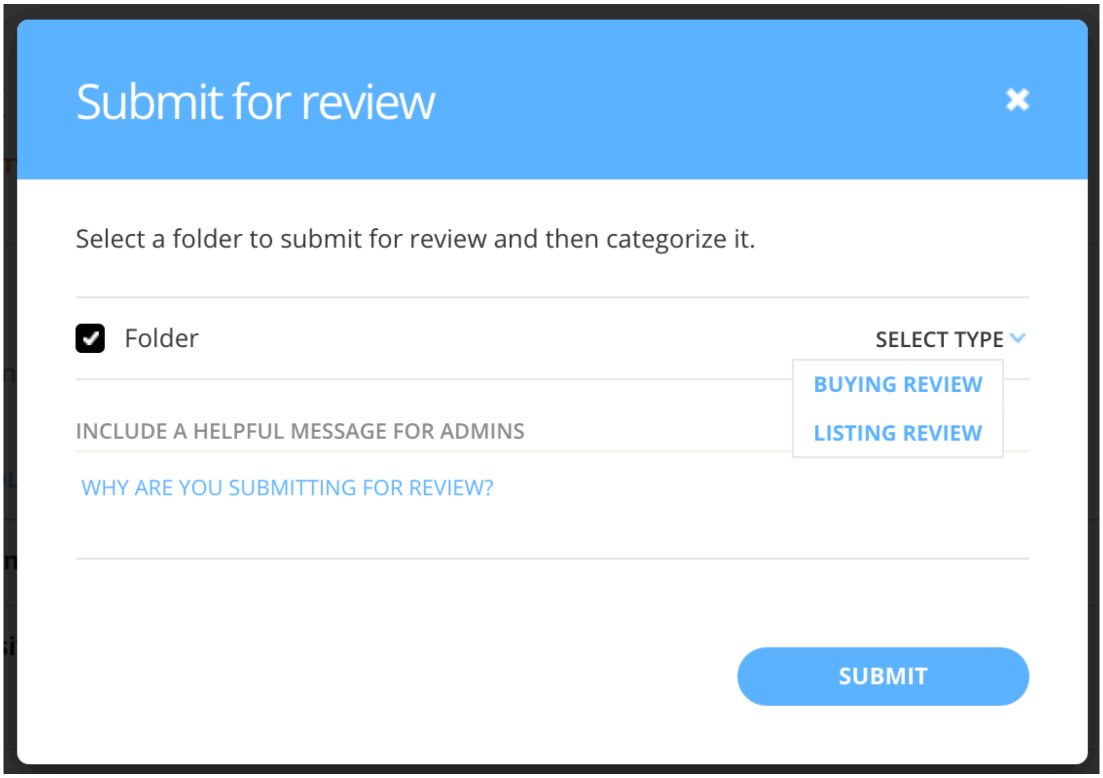
Now that the PDFs have been added, the folder is ready to be submitted for review. **However, if you would like the folder to be renamed before it's submitted for review, you will want to communicate this expectation to the agents**. Both you and the agent can click the 3 vertical dots to the right of the folder and select the **rename** option. Similarly, if you or your agent needs to rename a document, there are 3 vertical dots for each document on the far right. You and the agents can also reorganize how the documents and folders are arranged in your loop. Just click, hold, drag and release any document or folder up or down in the list.



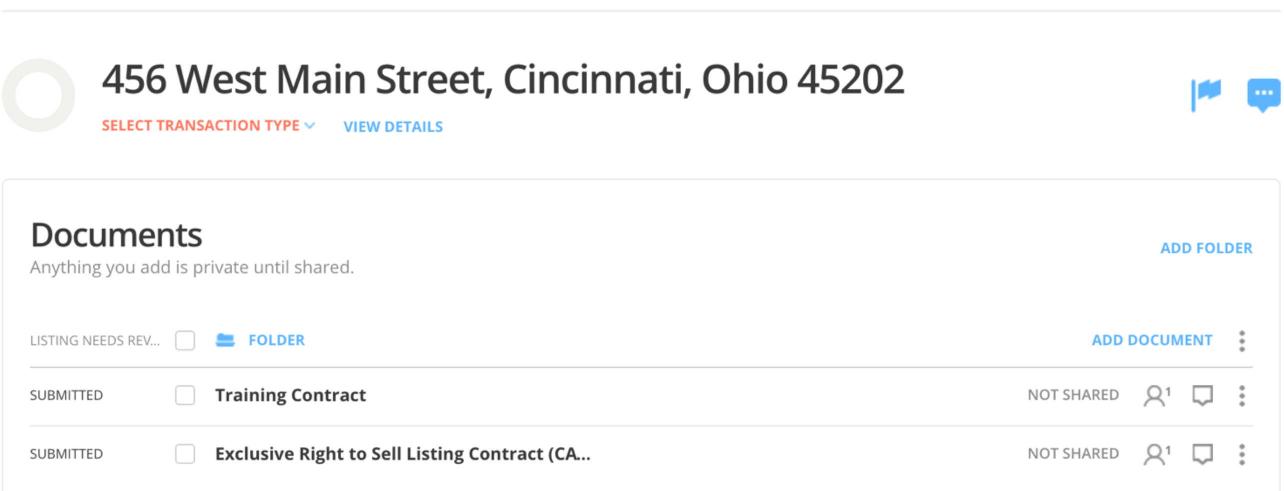
Once everything is added and in order, the agent clicks **Submit to Review**



The agent is then asked to enter the property address. Any admin can turn this step of the submission process off under the **My Account** section if desired. **Most offices require this step because it allows the admins to easily change the name in the *details* section of each loop**. The custom loop name is whatever the agent named the loop when they created it, while the standard loop name uses the property address as input in the screenshot above.



This final pop-up will display all of the folders an agent has created in their loop. The agent will checkbox the folder they intend to submit, identify whether it is a buying or a listing file, add an optional message (like a post-it note on a manila folder), and click **Submit**.

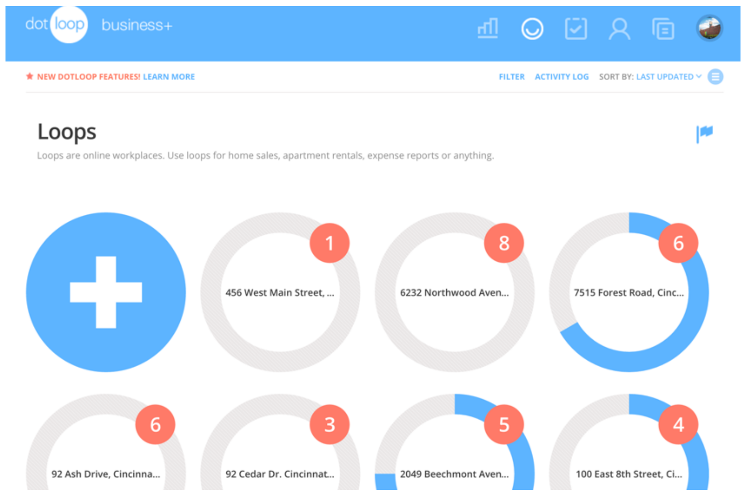


After the folder has been submitted, the agent will see a review stage next to the folder name. The review stage signifies what step of the review process each folder is in. We will explain each review stage in more detail in the **workflows** section of this manual.

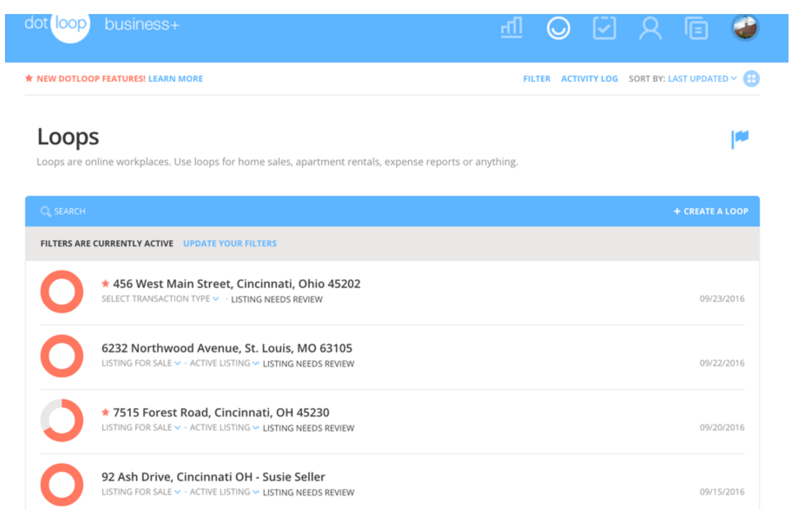
Reviewing loops:

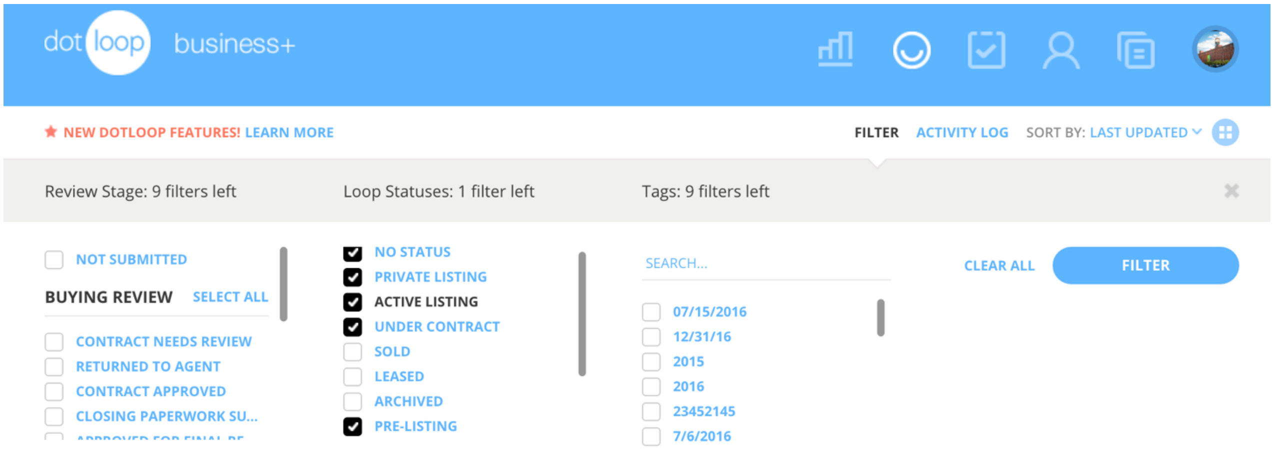
In this section, we will review the folder that was submitted in the previous agent basics section. Our goal here is to take you through the simple steps of performing an initial review of a file without exhausting every detail of every feature. More detail on each step of the review process and each feature of the dashboard can be found in its respective section.

First, let's log into our admin profile:



The first thing to point out about your admin profile is that you can choose to view all transactions in either a grid view (above) or a list view (below). **Many dashboard users prefer the list view because it presents the most information about the loop, whereas the grid view focuses on aesthetics by displaying a picture of the property (if added)**. Notice the small circle underneath your profile photo – This is where you would click to toggle between the grid and list view. Let's switch to the list view for the remainder of the manual.

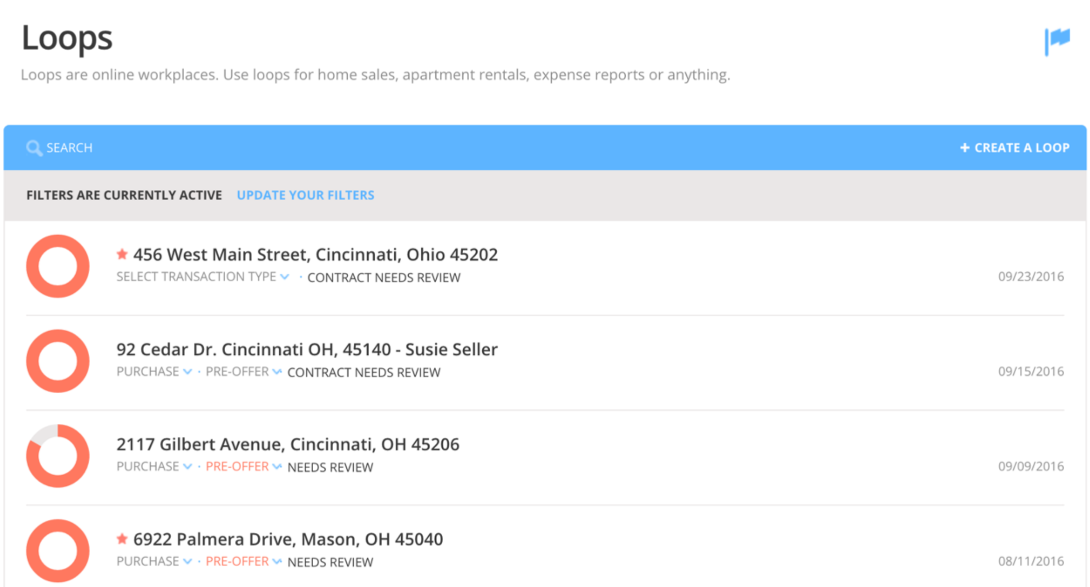




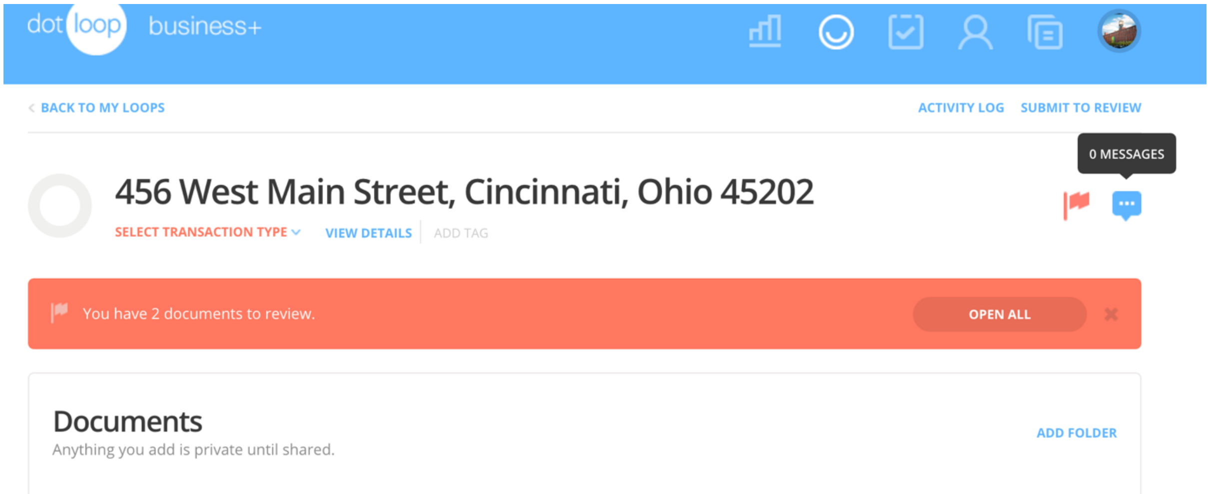
As soon as an agent creates a loop, it is visible in the admins regardless of whether the loop has been submitted for review or not. This is an important point to highlight because you will not want to see every loop each time you log in. Instead, you will want to filter your dashboard to only display the review stages that you are responsible for.

The first stage of the review process is **Needs Review.** Click on the filter dropdown, select **Needs Review** for the buying folder type, and then click the **Filter** button on the right.

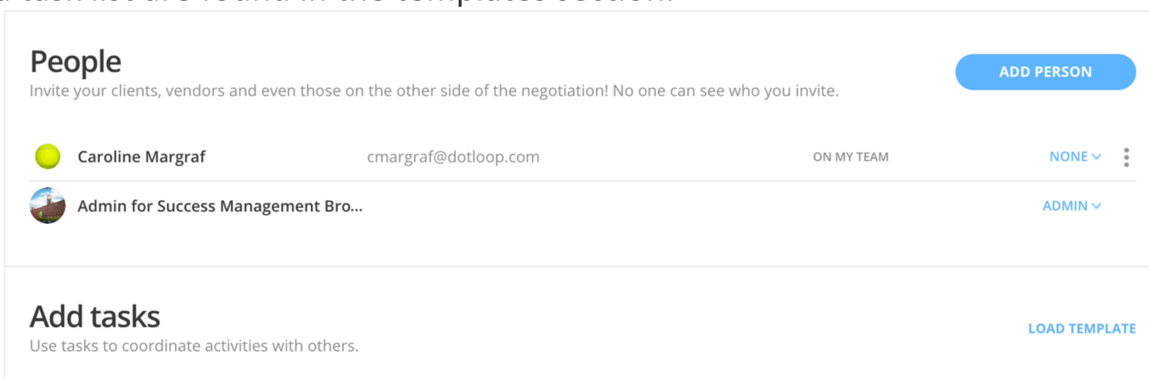
Dotloop will remember the last filter search you performed so that next time you log back in, you will not have to repeat this step. As you will see in the workflows section, the only review stages that should be consistently filtered for are **Needs Review** and **Additional paperwork submitted** on both the listing and buying folder types.

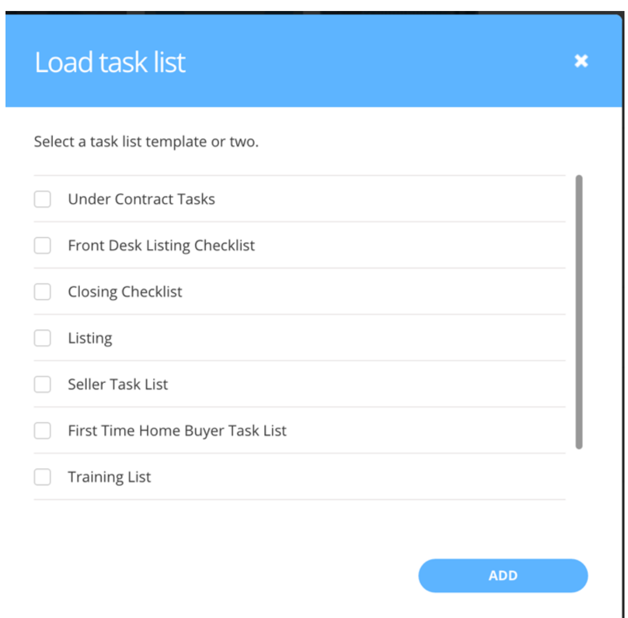


After filtering, you will only see loops that have folders under the review stage **Needs Review**. Click on the name of the loop to open it. Let’s click on 456 West Main Street to review the file.

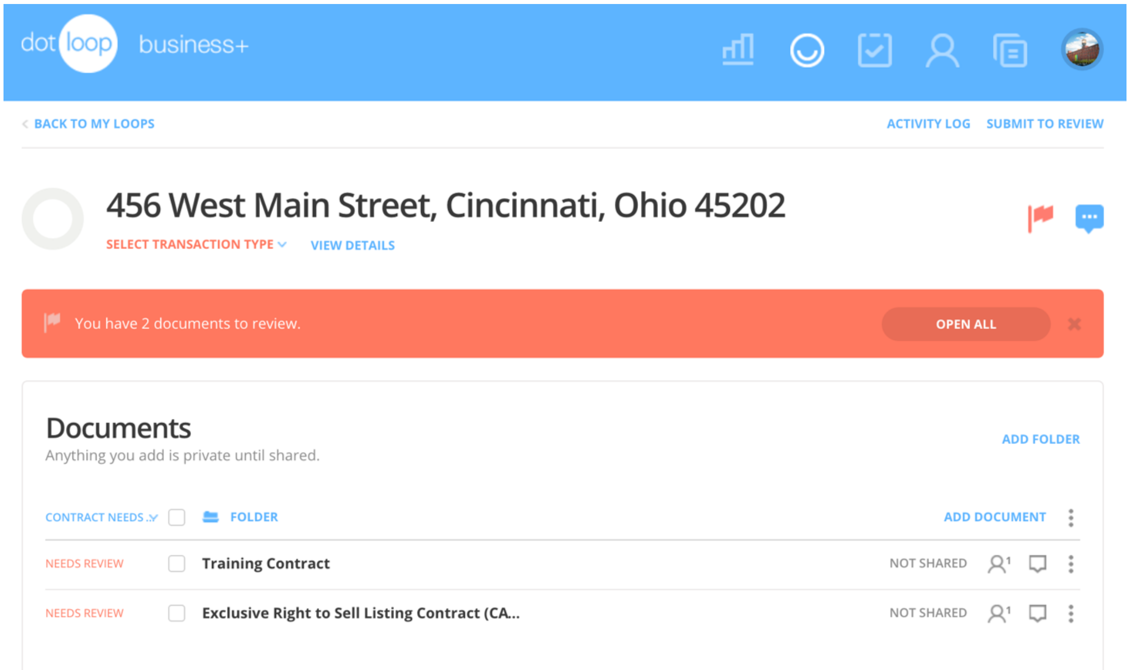


Once in the loop, you will want to click on the messages section to see if there have been any notes sent from the agent to you (see above). After checking the messages, you can click **Add Tasks** or **Load Template** to assign a task list template to the loop (see below). Instructions for creating a task list are found in the templates section.

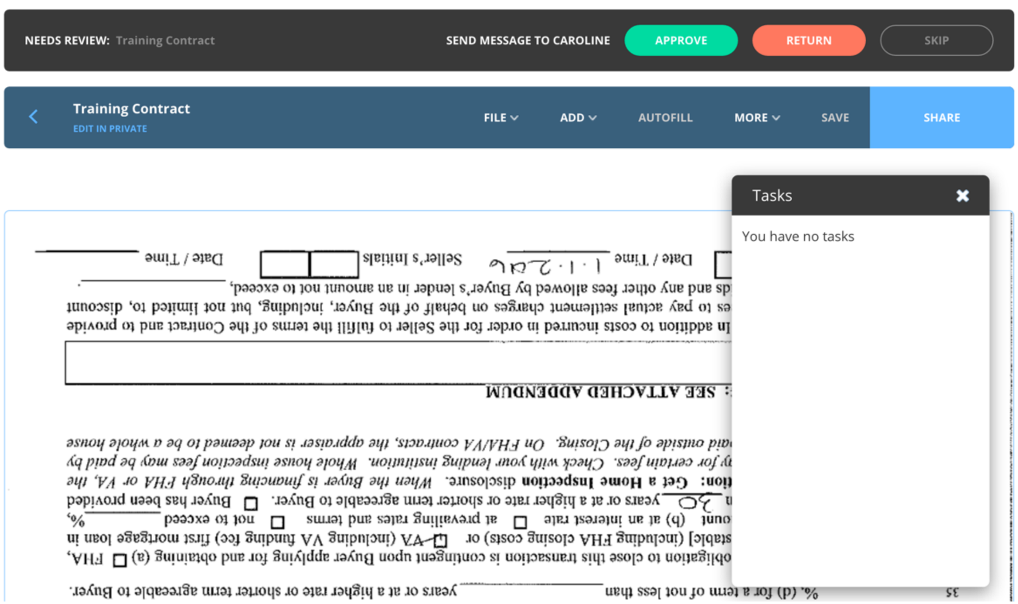




Select the appropriate task list from your task templates and click **Add.**

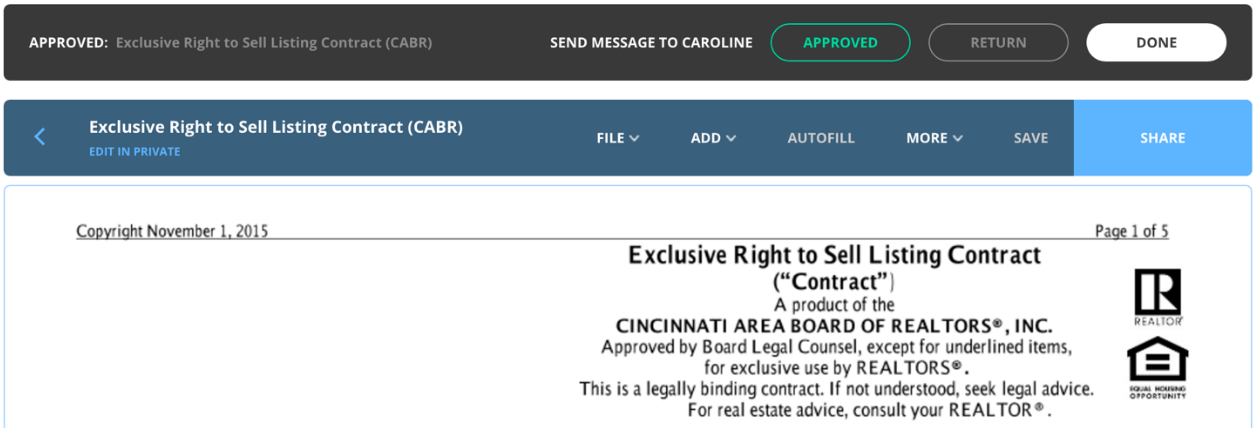


Now, scroll back to the document section, click the **Open All** button in the salmon banner across the middle of your screen. This will open all of the folder's documents into one continuous scrolling page for easy review.

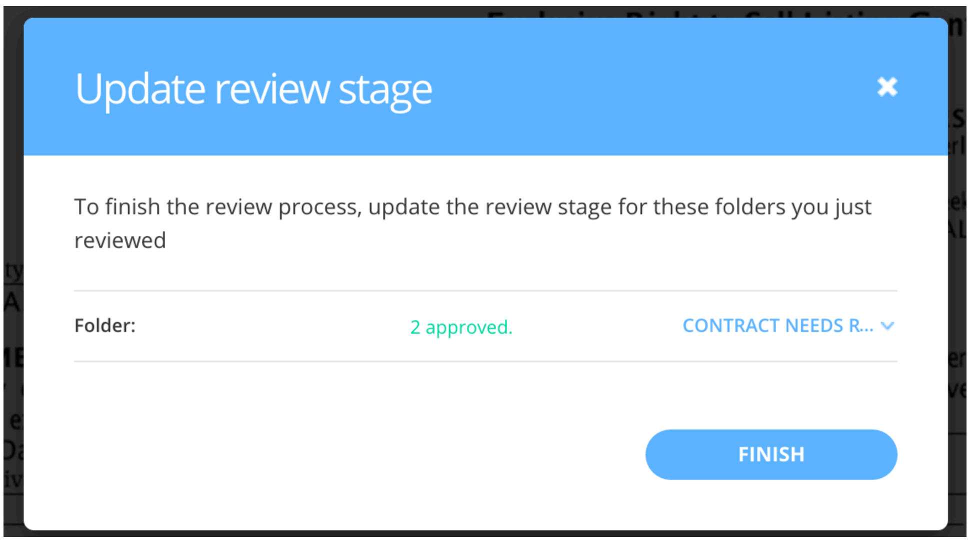


You'll notice a new addition to the document view, the black review bar. It is within this bar that you will be **approving** and **returning** documents to your agent. You can also send messages to your agent if they are missing anything on the forms using the **send message** option. *Dotloop will remember the name of the document in which you are sending the message, but make sure to note the page number for your agents.*

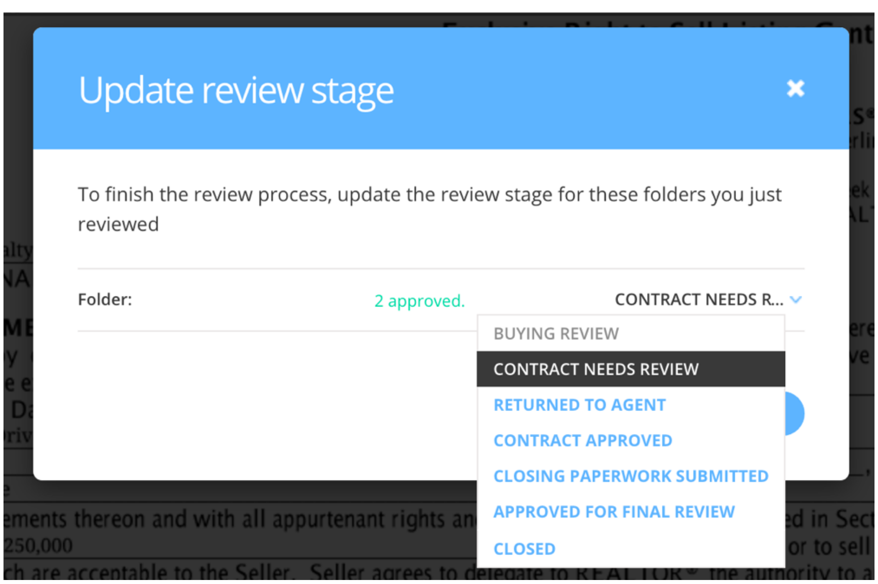
In the navy blue menu bar, click the **More** dropdown to display your task list. This will allow you to check completed items off of your task list while reviewing the documents.



Once you finish reviewing each of the documents, you'll select **Done** in the top right corner.



You will then be prompted to **update the review stage of the folder**. To change the review stage, click on the dropdown that reads **needs review**.



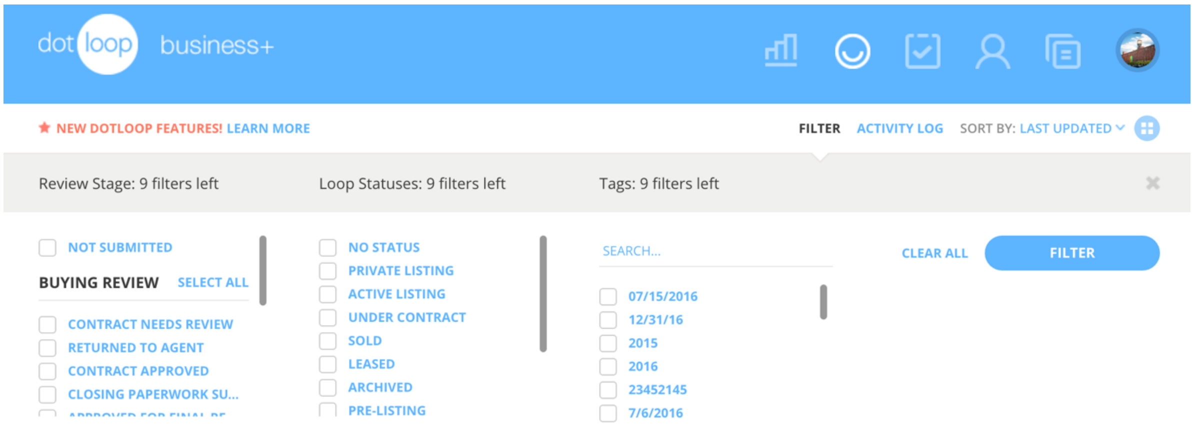
If the folder meets all of the requirements, move it to **Approved**. If the agent is missing documents or needs to make corrections, select **Returned to Agent**. Let's change the review stage to **Returned to Agent**.

Every time a folder's review stage is changed and any time you send an agent a message, the agent will receive an email. The agent will then need to make the necessary corrections as outlined in your messages and resubmit the folder for review.

Once resubmitted, the folder's stage will automatically change to **Needs Review** once more. This returning/re-submission process can happen as many times as necessary until the folder is approved. *Although messages are sufficient for relaying folder requirements, you may also consider assigning tasks to the agent or using document tags for further clarity/urgency.*

Filtering:

When you log in to your admin profile, you will see all of the loops that have been created by your agents, even the loops that haven't been submitted for review. Filtering is your way of managing what is presented to you. Or, to think about it another way, filtering is how you hide what you don't care to see. There are three different filtering subsets to be discussed:



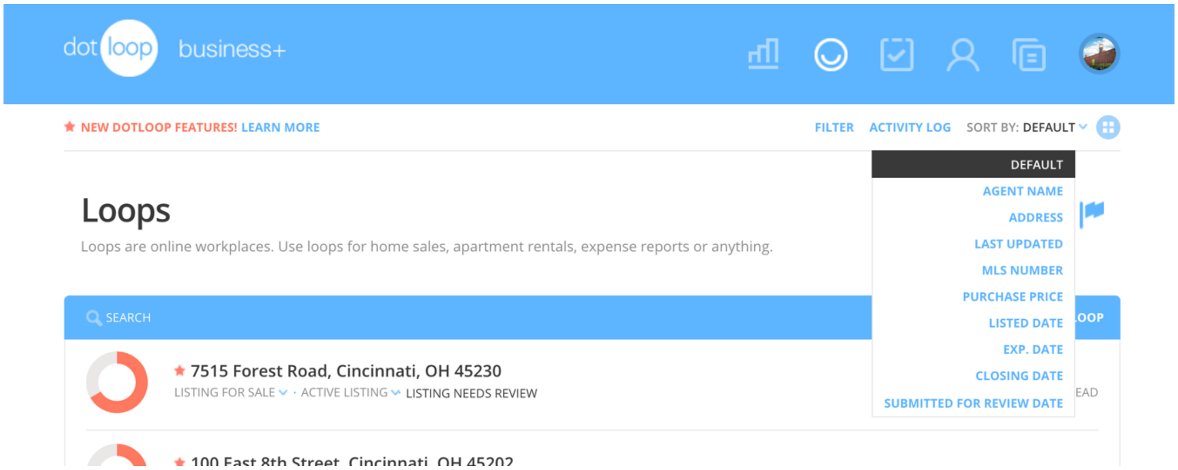
Review Stage – The review stage is the stage of the folder once it has been submitted to review. Using this column will help you keep only loops that need your attention on your homepage.

Loop Status – A loop status should not be confused with its review stage. In many cases, the agents to control the loop status as a way to keep their transaction updated. By default, when you first log in to your admin profile, the 8 active loop statuses will be selected. We recommend leaving those selected, as it will keep those active transactions on the homepage.

Tags – A loop can be 'tagged' with any word or phrase that you create. For example, if you tag a loop according to where the lead came from, you can easily go back and see how many leads were generated from each source.

Sorting:

While filtering allows you to display only the desired loops, sorting allows you to reorganize the order in which those selected loops appear on your dashboard homepage. Below is a definition of your sorting options:



default: allows you to sort your loops in a way that dotloop has predicted will be the most helpful. This is a combination of your last updated loop and the number of notifications within the loop, in descending order.

Agent name: allows you to sort your loops by the agent who creates them. The agents will be sorted in alphabetical order by first name.

address: Sorting by *address* will sort your loops numerically first, then alphabetically, based on the address you provided in the *Edit Details* of your loops, **not the title of the loop**. For example: **123 Main Street** will display before **123 Wynne Place**. On that same note, **1123 Main Street** will display before **123 Main Mainstreet**. This is because dotloop looks at the first character, then the second, then the third, etc and sorts by those characters. Loops that do not have addresses entered in the *Edit Details* will display at the bottom of the list.

Last updated: Sorting by *last updated* is very straightforward. If anything has changed in a loop, at all – document signing, review stages, people being added, messages sent, etc., the most recent loop meeting these requirements will appear at the top of the list. Loops will display in descending order based on the last change made within them.

MLS number: Sorting by the *MLS Number* is very similar to sorting by *address*. It is based on the first, second, third, etc., character in the MLS Number. So, **11458973** would come before **18556**, for example.

Purchase price: Sorting by *Purchase Price* will display your loops in order by the dollar amount entered in the purchase price field within a loop's *Edit Details* page. The largest number displaying first, the lowest displaying last. Loops without a purchase price in the *Edit Details* will be moved to the bottom of the list.

Listed date: Sorting by *Listed Date* will pull the listing date from the *Edit Details* page of each loop, displaying the loops with the newest listing date first. Loops without the listing date filled out in *Edit Details* will display at the bottom of the list.

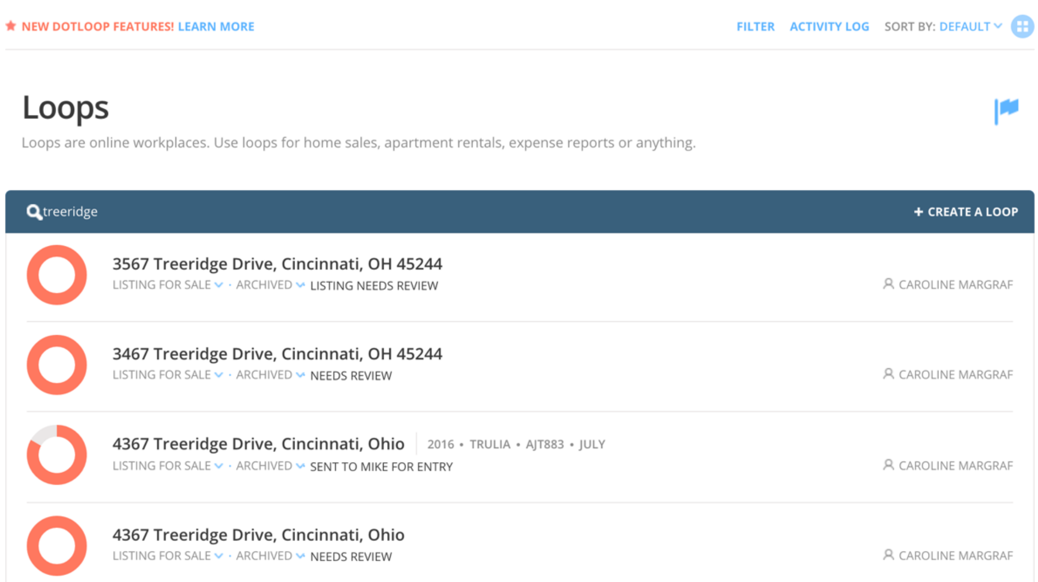
Expiration date: Sorting by *Expiration Date* will display loops that expire soonest or have already expired, based on the expiration field under the *Listing Information* portion of a loop's *Edit Details* page.

Closing date: Sorting by *Closing Date* will display loops that close soonest or have already closed, based on the closing date field under the *Contract Dates* portion of a loop's *Edit Details* page.

Submitted for review date: Sorting by *Submitted For Review Date* will sort loops that were submitted for review most recently, first

searching:

This search bar pictured below is only available on the list view of your admin homepage. You can type any key word of a loop's custom name.



It's important to note that the dynamic search will not override any filters you have set. The search only locates loops that are displayed on your homepage.

focused topics:

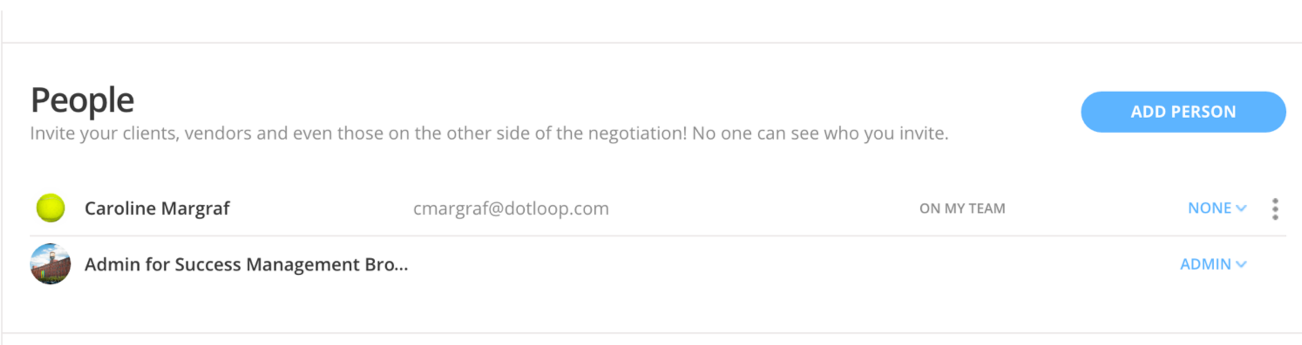
creating loops for agents:

Creating and submitting a loop is easy, but you still may have a few agents who are especially resistant change and/or technology in general. In this case, you may find yourself bending the rules a little at first as you help agents learn the ropes. If you decide to create loops and upload documents for your agents, follow the same steps that are outline in the agent basics section of this manual.

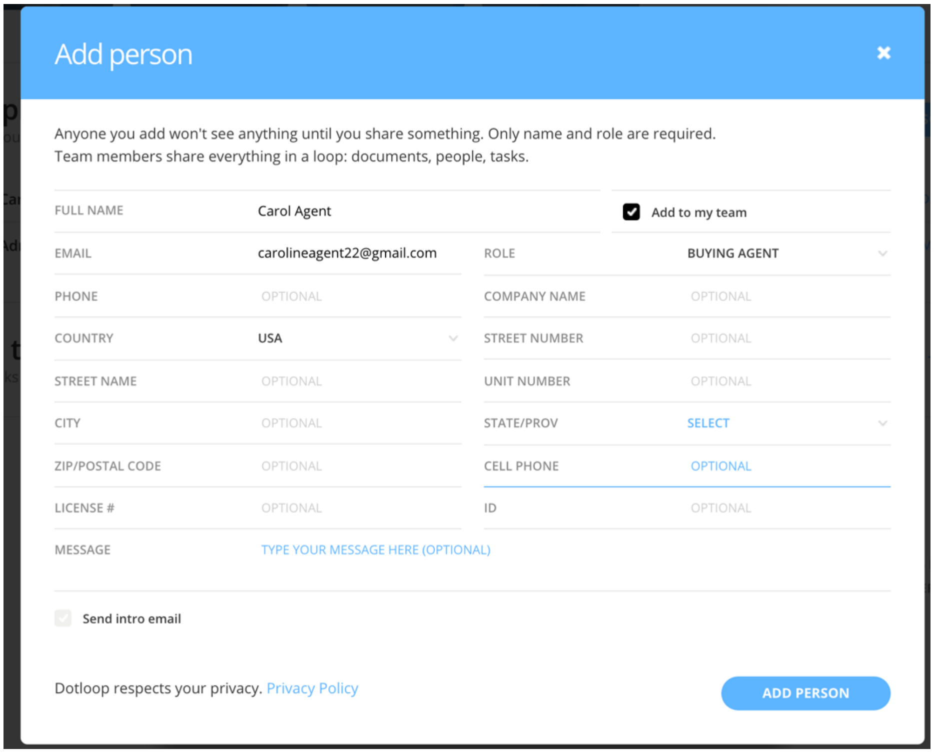
Once the loop is created, you can click **submit to review** directly from the dashboard to initiate the online review process.

This now turns into a great opportunity to highlight the value of dotloop to your agent. You have the option to add the agent to your team at any time. If you add them immediately, show them how they can log in to dotloop from anywhere, anytime to have access to all of their files. Or, hold off on inviting the agent onto your team until the agent needs something from that transaction. Then you can remind them that they would always have all of their documents in their pocket if they would stay organized in the loop! We won't steer you in any specific direction on this technique, but we've seen offices charge an upload fee for agents who want to continue using office ink and paper.

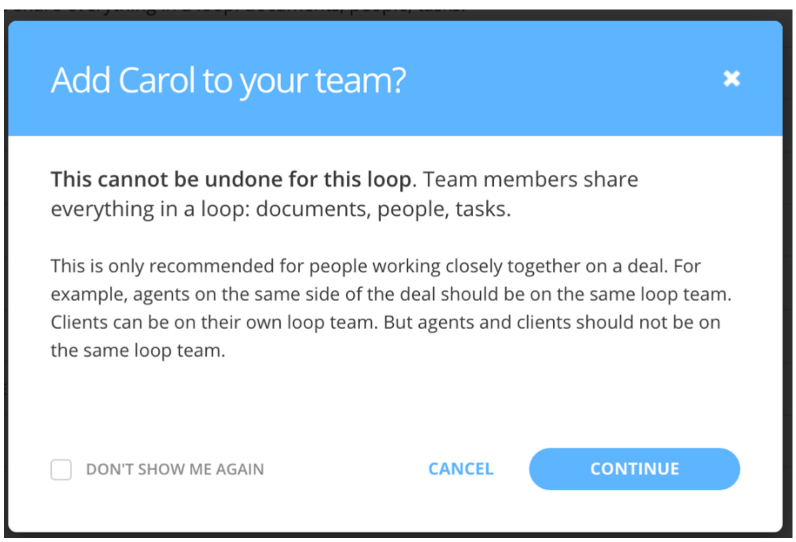
Let's take a look at how you would add an agent to your team in a loop, giving them access to everything you've added immediately.



Once you've created the loop, click **add person** to add the agent to the loop.



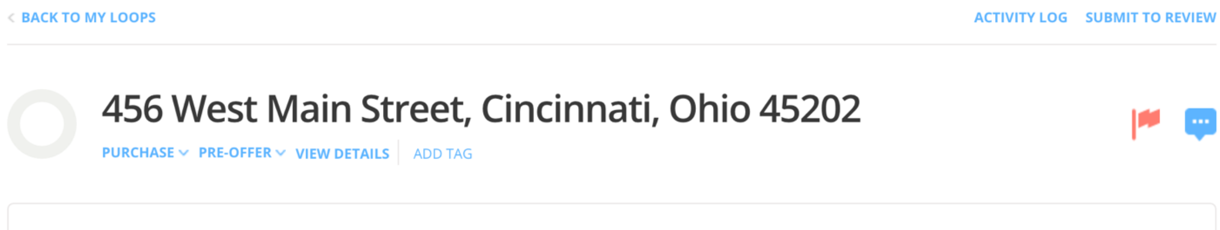
Just like adding a client to the loop, all that is required to add the agent is their full name and email address. Make sure you place a check inside the box to the left of **add to my team**. Once you check mark this box, it will bring you to the pop-up window you see below.



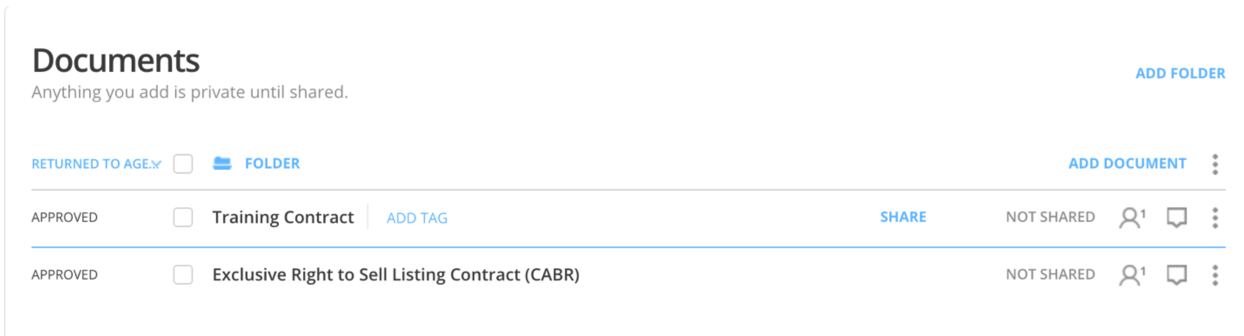
It is important to note the adding a person to the team cannot be undone so make sure you are adding the right people to the team! You'll select **continue** and be able to add the agent to the loop.

Tags:

Only admins have the ability to create custom document and loop tags. The usage of tags is not required, but you will likely find that they are a valuable addition. Tags can be filtered for on the admin homepage in the same way that a loop's review stage or status is. Let's take a look at a few use cases for both document and loop tags.



To add a tag to a loop, open the loop and click **Add tag** to the right of the view details tab. Some offices use tags to identify where the lead for that transaction was generated. Others use tags to identify which admin is in charge of reviewing a specific loop. You might also add the tracking number of the lockbox that was used on that transaction, ensuring you know who had each lockbox last.



To add a tag to a document, hover to the right of the document name and click **Add tag**. You might use document tags to identify that it has been approved, review, rejected, or that it's missing signatures. Most of your communication back to the agents will be through the messaging center, but remember that the tag option is here for you as well.

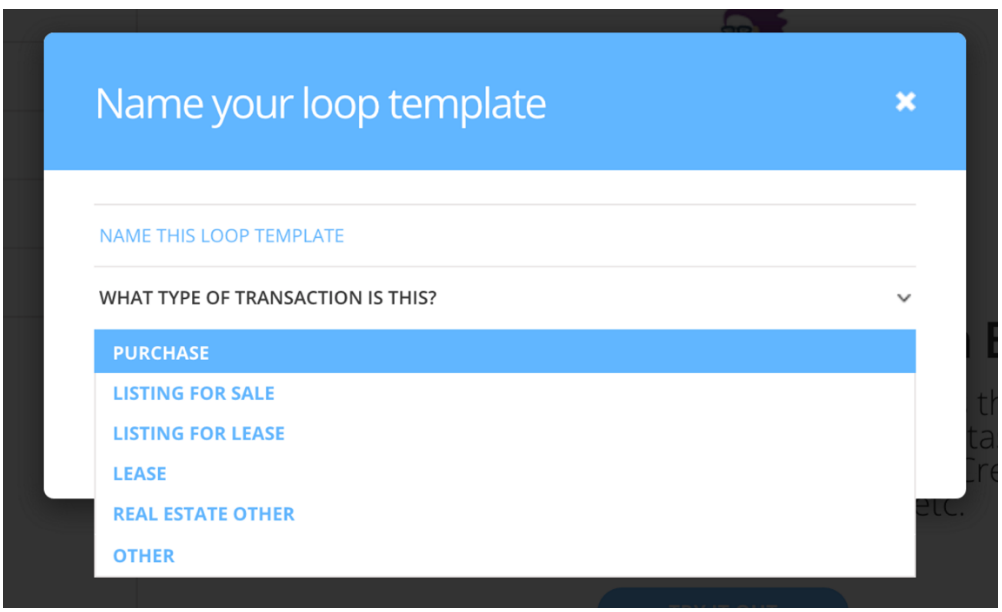
templates:

The fifth icon over on the top right corner of dotloop, this section allows you to create templates that your agents can easily pull into a loop. In this section you can manage loop and document templates, set up task lists for your office, and prepare clauses for your agents to easily pull into forms.

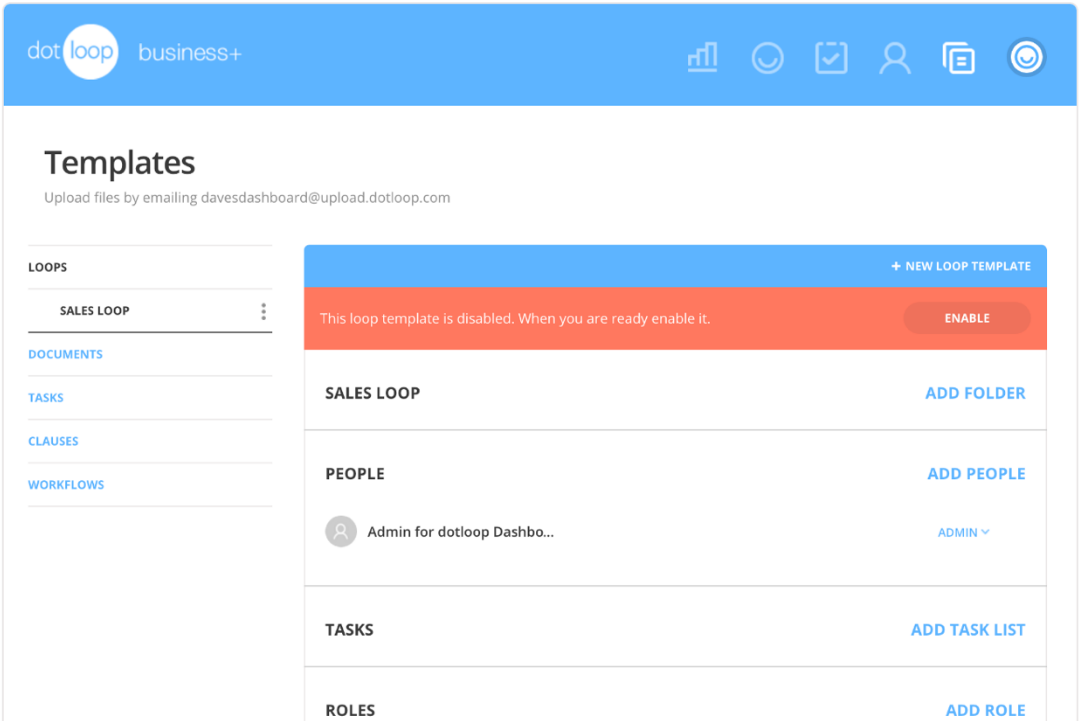
Loop templates:

Loop Templates allow admins to control the people, documents, and task lists that are auto-added to a loop when it is first created. These loop templates also allow you to dictate what information or which documents are required before an agent can submit for review. This saves your agents time during loop creation and saves the office staff valuable time during the review process.

Begin by naming your loop template, and choosing the Transaction Type. We will want to choose the type that best suits the type of loop we are setting up. Ensure that this selection is correct though, as we cannot change it later.



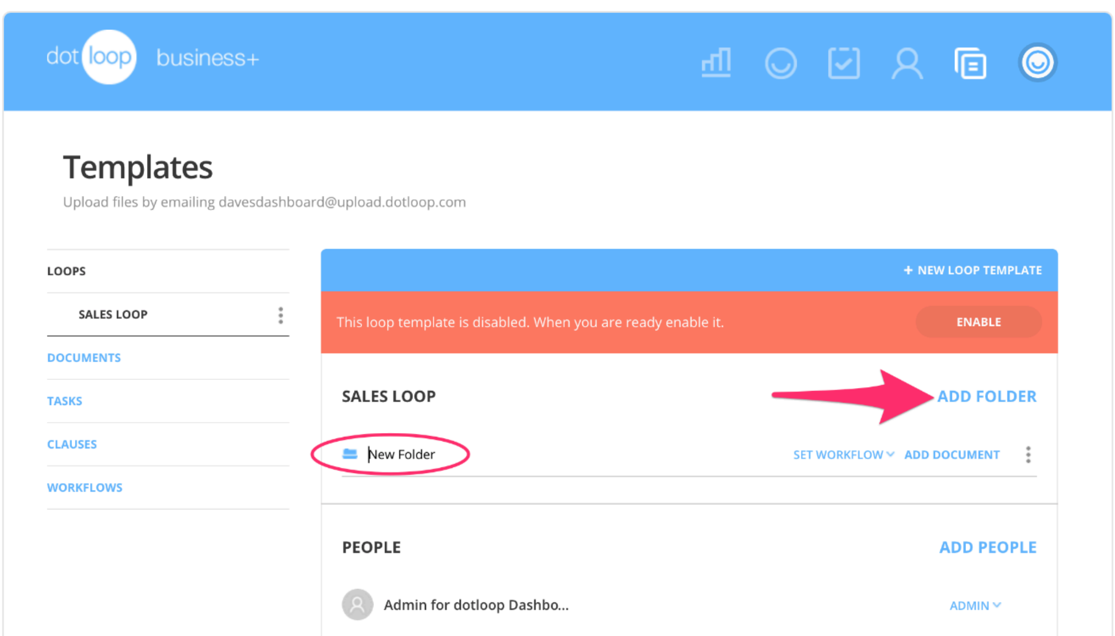
By default, loop templates are disabled when they are created. This gives admins a chance to fill them out until satisfied, and then enable them when ready. Loop templates can be renamed, deleted, disabled, and enabled by any admin.



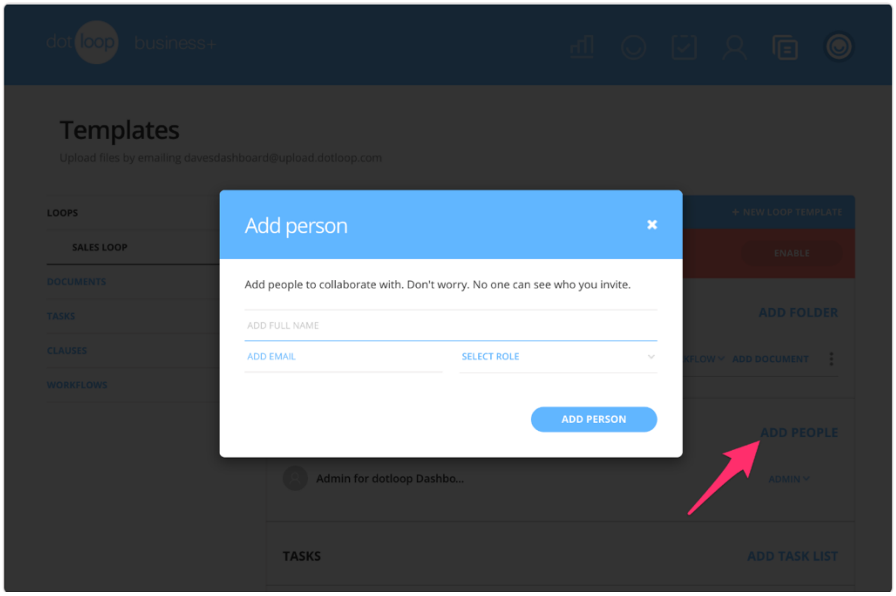
Add folders and documents to the loop template by clicking **ADD FOLDER** and naming your new folder.

Clicking **ADD DOCUMENT** will pull up your templates, allowing you to add documents to your folder, the same as you would in a loop.

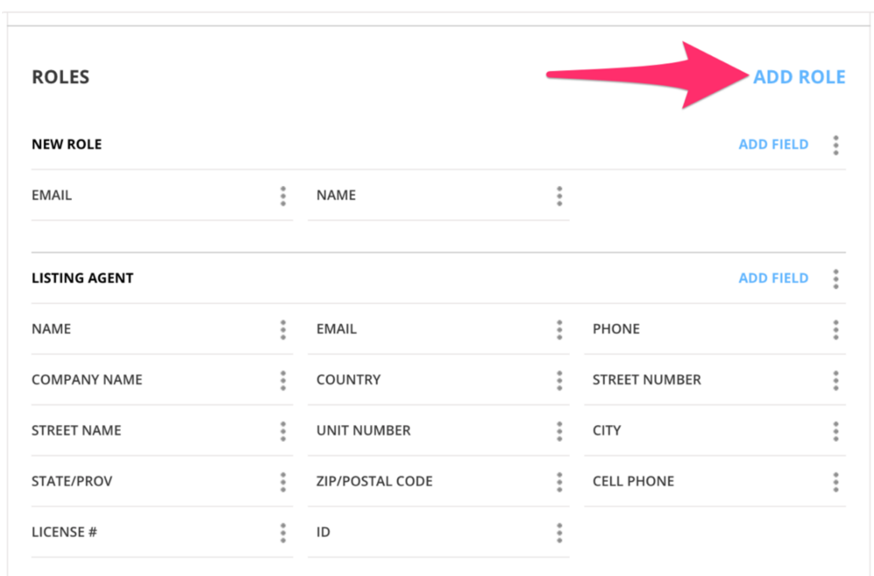
Clicking **SET WORKFLOW** will allow you to choose which workflow this folder defaults to when the agent submits it for review.



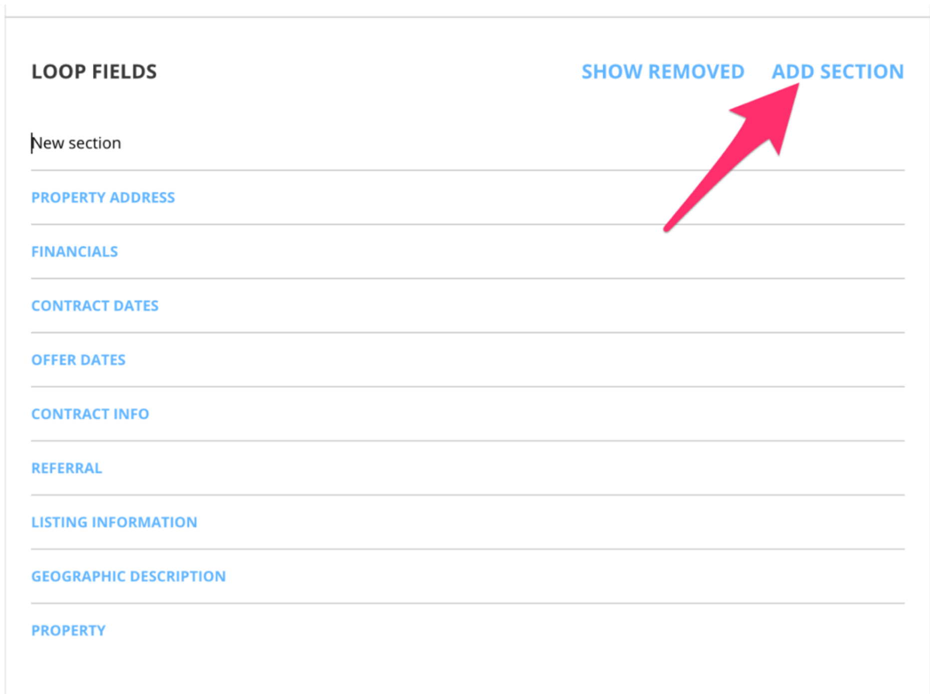
If you need to add people to your loop template, simply click *ADD PEOPLE.* You will be prompted to enter their full name, email address, and to select a role for them. These people must be dotloop Premium members, and will appear in each loop created with this template. Anyone added to a loop template will appear in each loop created that utilizes the template, thus adding each loop to that person's account when an agent creates a loop with this template.



The ability to set default roles in your loop templates is very powerful. You can add new roles as needed, and you can make fields pertaining to that role required when the agent submits for review. These roles can also now be used for assigning people to document templates as well!

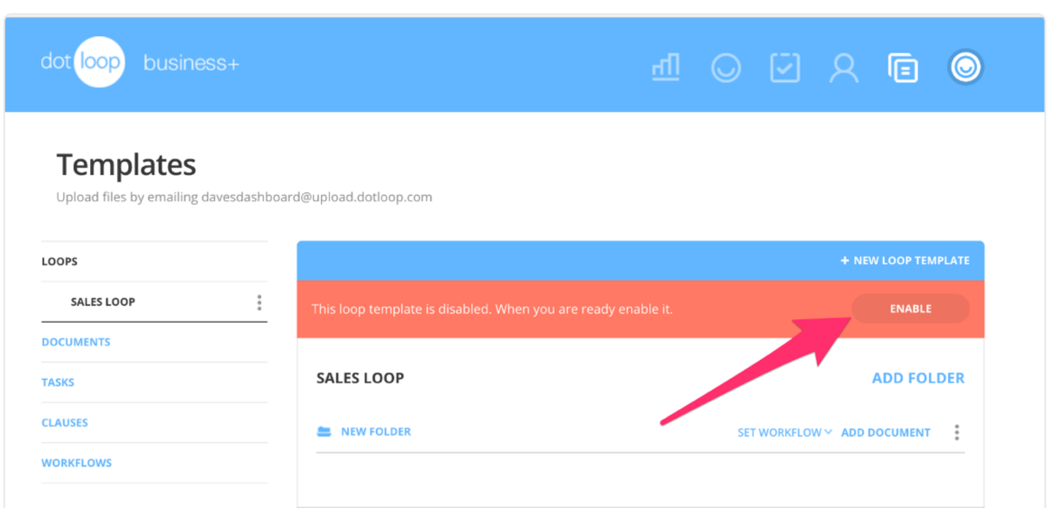


Loop fields are a great way to really get involved and customize a loop template. The **VIEW DETAILS** page in a loop can be manipulated from this portion of loop templates. You can add sections to the view details page simply by clicking **ADD SECTION**, as needed. You can add fields to each section by first clicking on the section title, and then clicking the **ADD FIELD** option. Similar to "Roles", you can make these fields required when submitting for review. Perhaps the most useful part of the Loop Fields section is when using it in conjunction with documents – mapping your newly added fields to your documents!

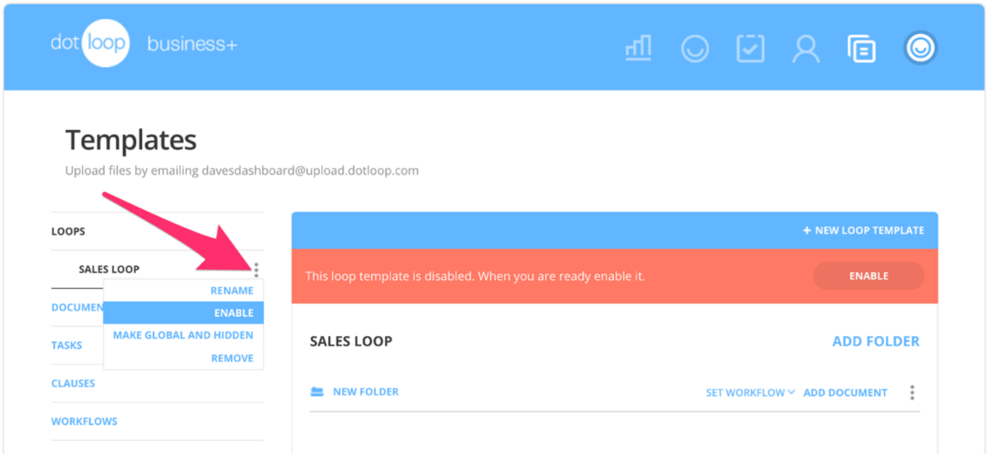


After you have completed setting up your loop template, click the "save" button.

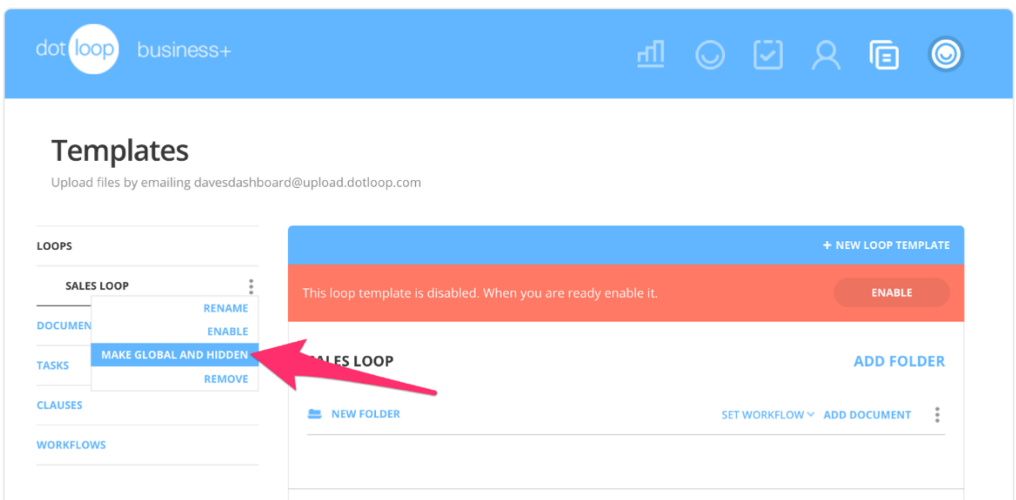
Once your loop template is set up we can enable it. This can be done initially by clicking the **enable** button on the banner across the top of the loop template.



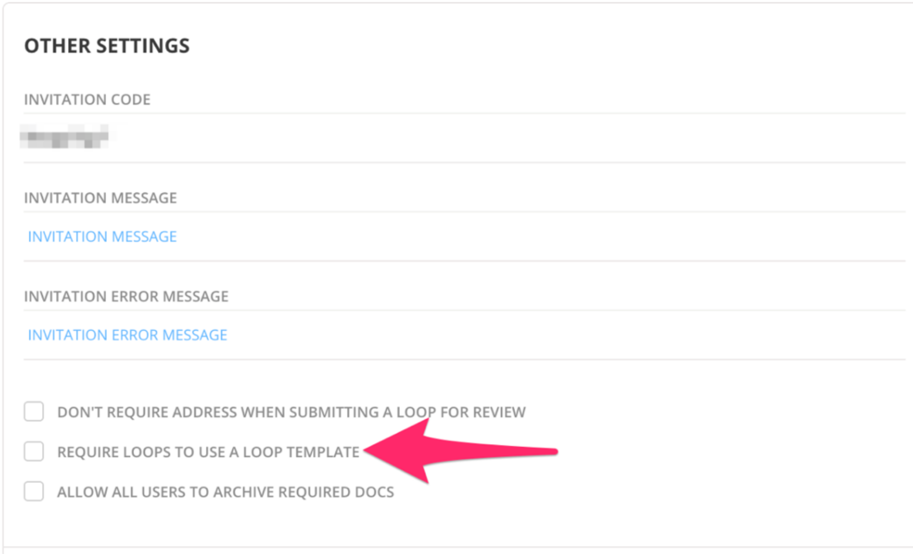
Alternatively, you can enable (or disable) the loop template by clicking on the menu icon to the right of the loop template's name.



In this menu you will also notice an option that says **MAKE GLOBAL AND HIDDEN**. What this option does is makes a global loop template, meaning any new loop template you create that has the same transaction type will clone this loop template. This loop template however will not appear for your agents as a selectable option, but, if an agent creates a loop without selecting a template, and selects the transaction type of the global and hidden loop template, the template will apply itself to that agent's loop.



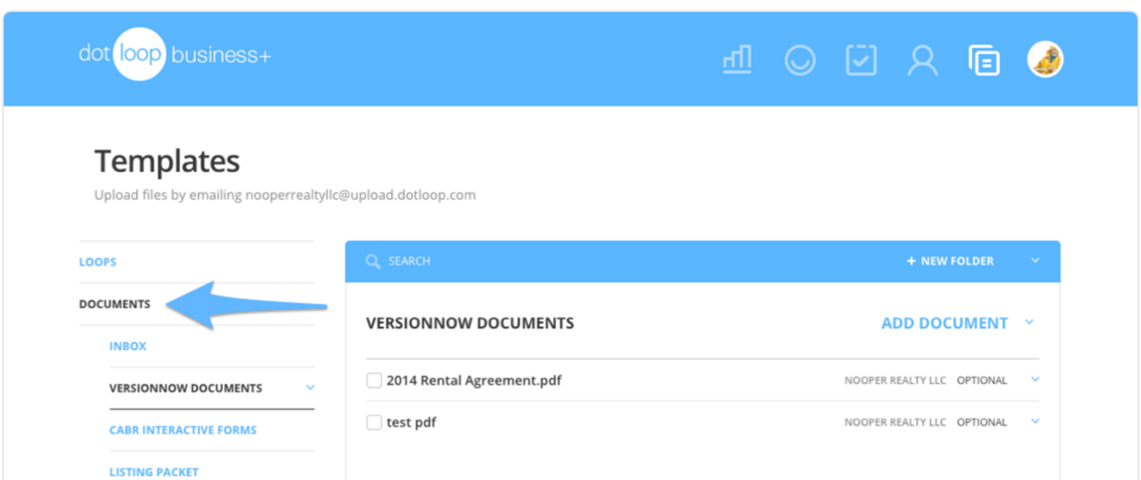
The last option for enabling loop templates is located in your **MY ACCOUNT** section. Navigating here in your admin profile, and scrolling to the bottom of the page, you will see and option you can enable in regards to loop templates: **REQUIRE LOOPS TO USE A LOOP TEMPLATE**.



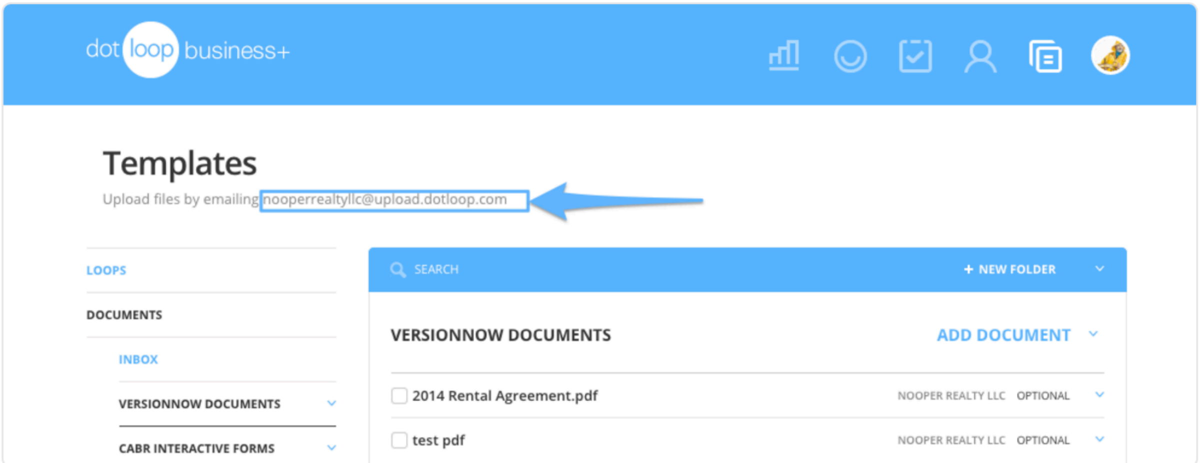
document templates:

Document templates will be used everyday by the agents in your office, so it only makes sense that we give you all the tools you need to make the most out of them. Your document templates are folders prepared by you or another admin, that the agents in your office inherit, pull into their loops, and can even add to their own document sets for individual convenience.

When we first enter the templates page we are placed into *Loop Templates.* If we click the *Documents* tab just below that, we'll see all of the document sets available to us.



You will always have an *Inbox* folder and a *Docspot* folder. The *Inbox* folder contains any PDF documents you uploaded via email to your admin profile templates section. You can find the location of this email address located here:



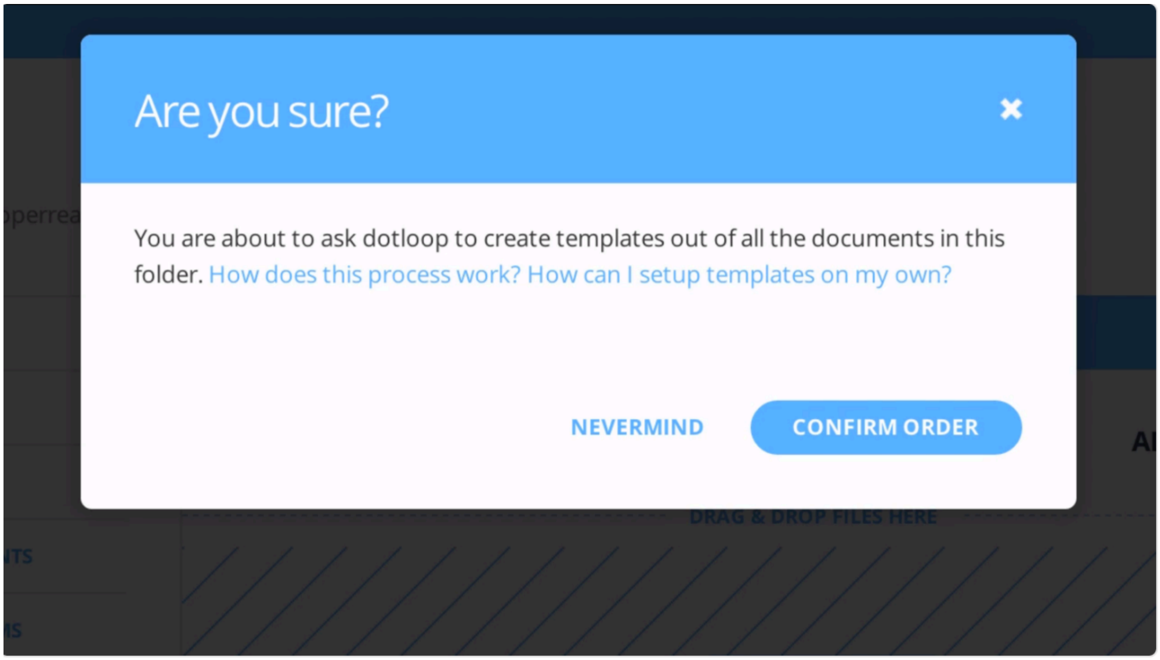
Next, we have the *Docspot* folder. Use the *Docspot* folder when you have any documents that need to be made interactive for you and your brokerage. These documents can be any state or local documents that have not been previously set up by your association, or are not already available in your templates library.

Upload these PDFs to your *Docspot* folder, you can pull them from your computer or email them into your inbox and copy them into the *Docspot* folder. Once you have loaded in all the documents you need, you will request that they be made **interactive**. Navigate to the down-facing arrow to the top right of the *Docspot* folder. From this menu, select **Request Documents To Be Setup**.

IMPORTANT: You must submit only ONCE. Submitting multiple times will cause your request to be reset in the queue. Make sure you are only submitting when you have all of your documents ready.

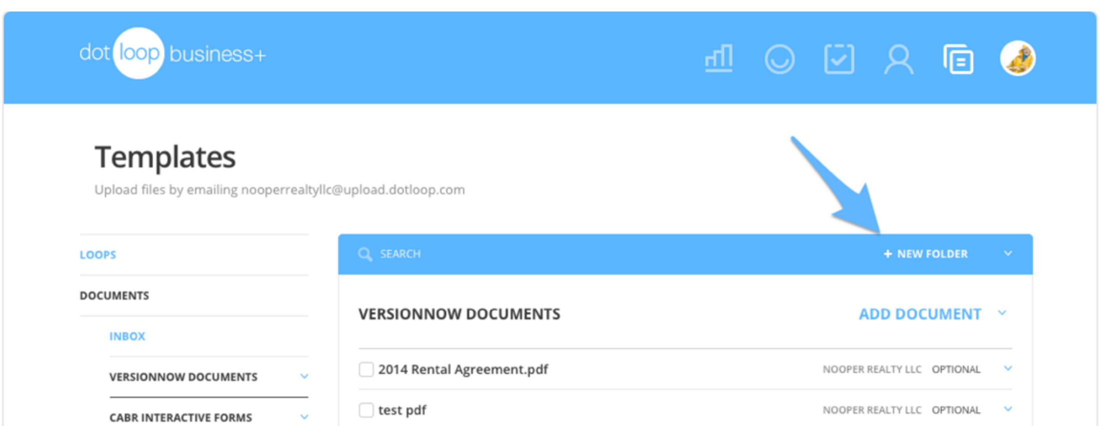
If you need to add more documents after submitting, create a second Docspot folder (named Docspot 2) and submit the documents within that folder separately.

You will then be prompted to confirm your submission.

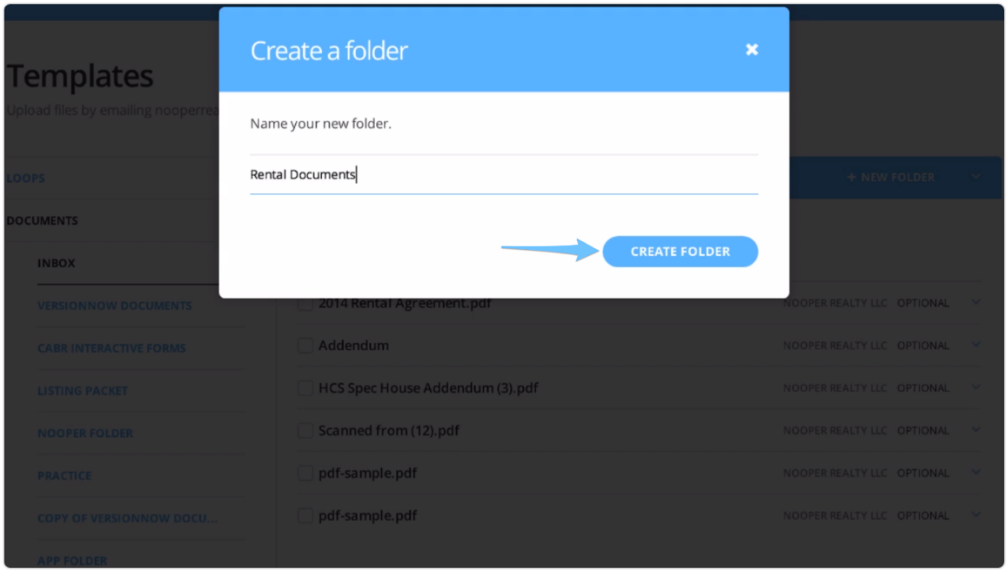


How to Make Document Folders:

If you would like to organize your forms into 30eparate folders, document template folders are perfect for this. Creating your own template folders is as easy as clicking the **New Folder** button on the blue search bar in your document templates sections.

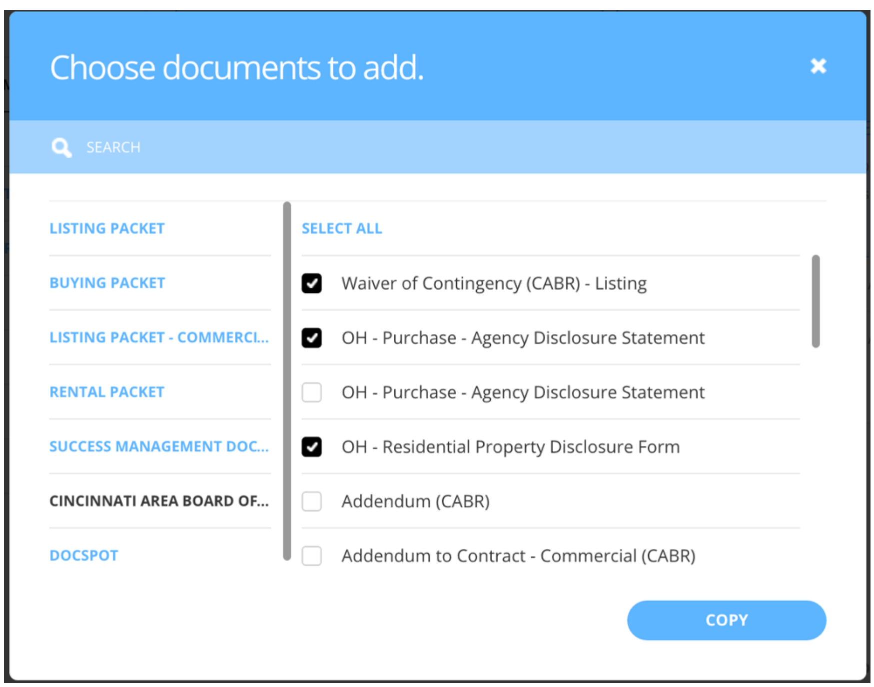


You will be prompted to name your new folder. Once you've given your folder a proper identifiable name, you will want to click the blue *Create Folder* button on the bottom right of the prompt.



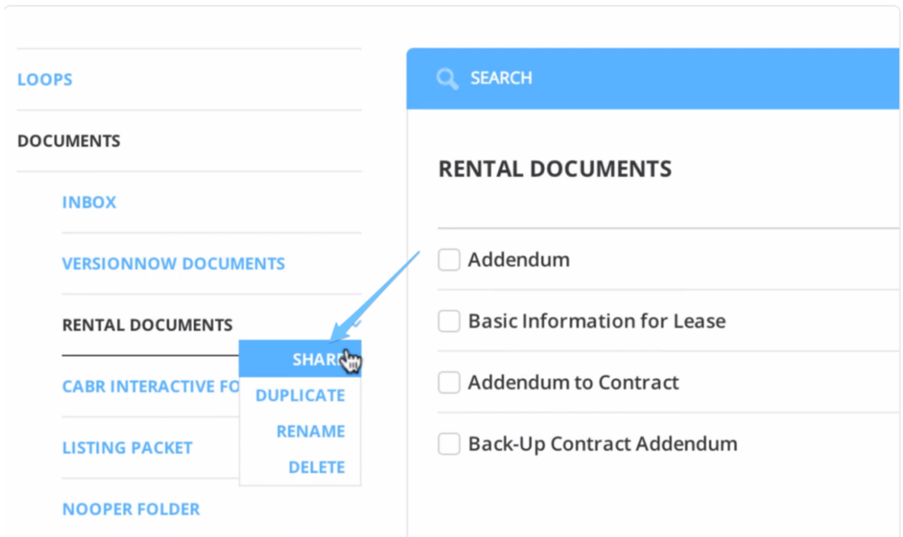
From here you will be placed in your empty folder. To bring documents into this folder, select **Templates** or **Browse**.

For this example, we've selected **Templates.** You will now be prompted to select a folder, and checkmark documents from within that folder you wish to pull into your newly created folder. Once you've selected all the documents necessary simply click the blue **copy** button on the bottom right of the window.



You will now see your documents displayed in your new folder.

By default, your agents cannot see the new folders you create within your business admin templates. Once you're ready for them to use your new folder you must share it with your office. This is as easy as navigating to the folder title in your templates section and clicking the down-facing arrow to the right of the title. Choose **Share** from the menu. This folder and all of its contents are now available to every agent attached to your office.

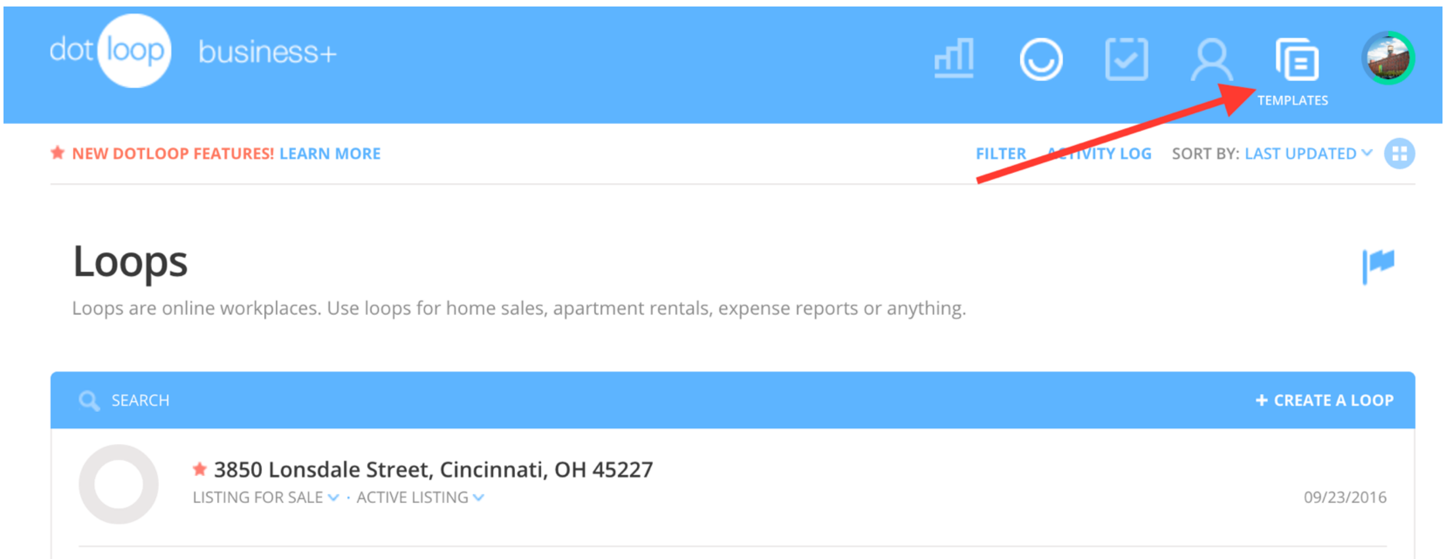


tasks:

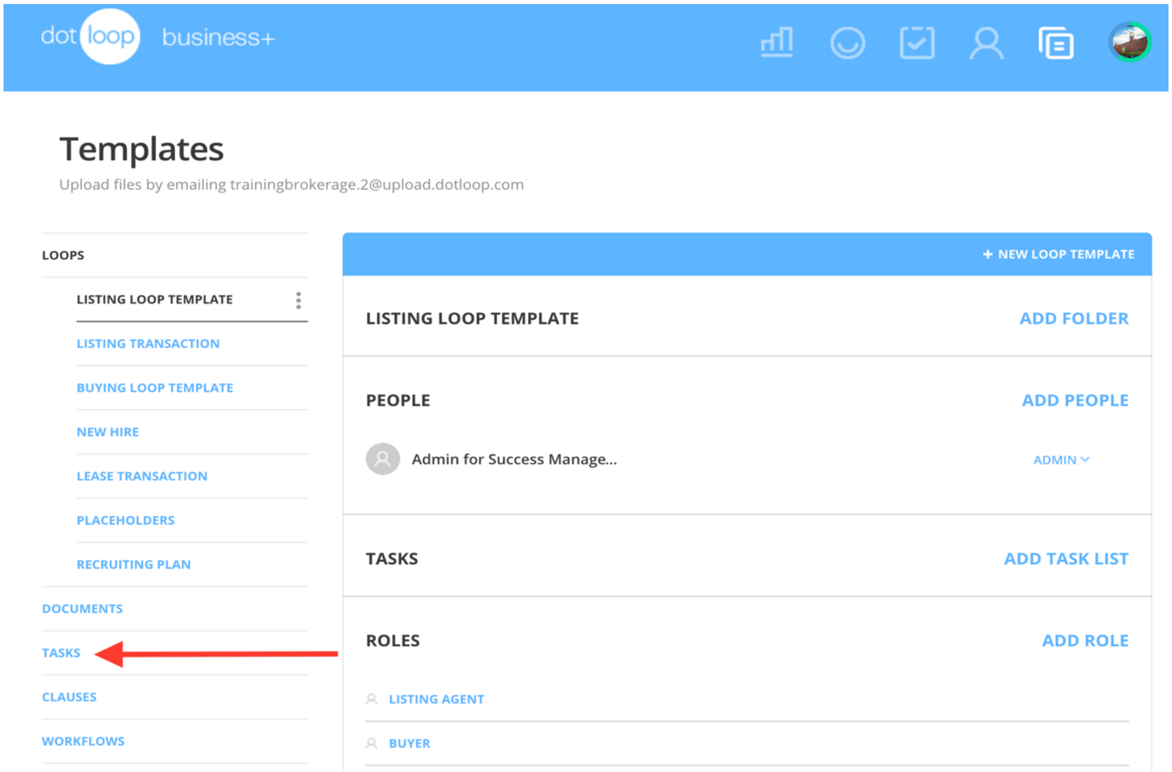
A task template is simply a reusable *Task List*, which is a group of tasks. These can be created by a user (agent) and loaded to any loop they create, or created by an admin (broker) and be shared with their entire office. As an agent your task lists that you have created are your own personal lists that are only accessible by you, but any admin created task list can be shared down to everyone in the office, but are only editable by an admin.

Creating a task template

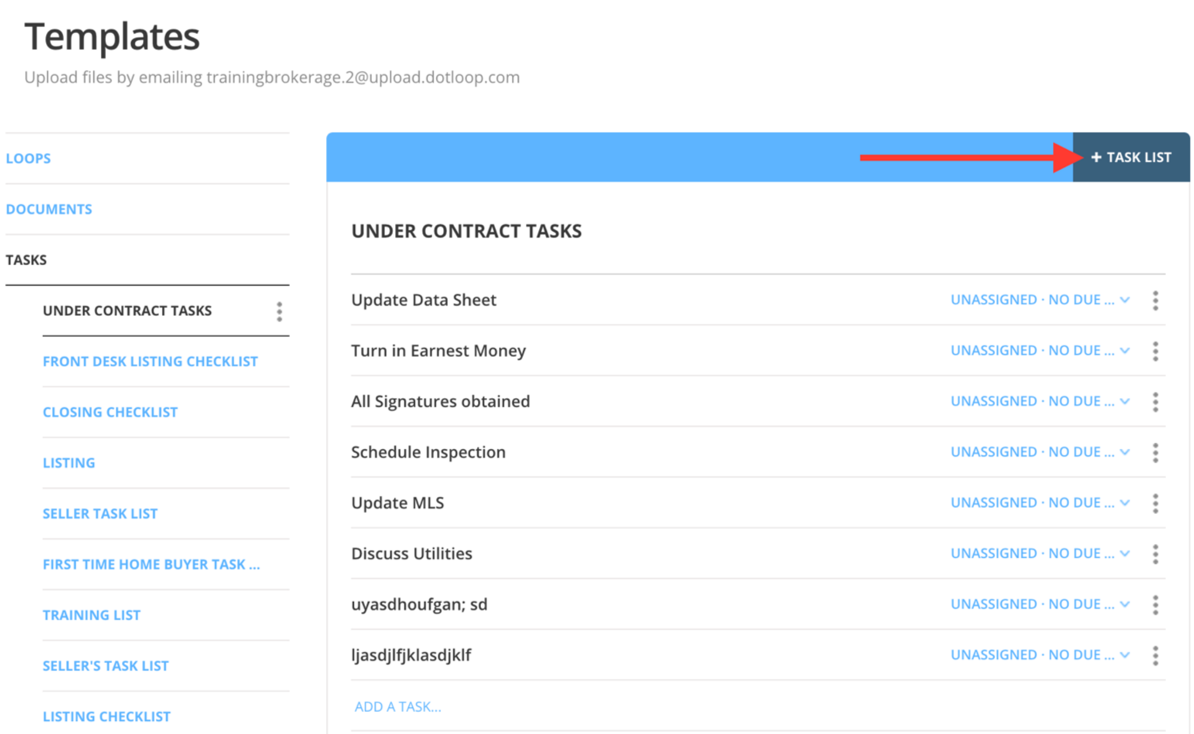
To create your own task template, let's first navigate to the **TEMPLATES** section of your account.



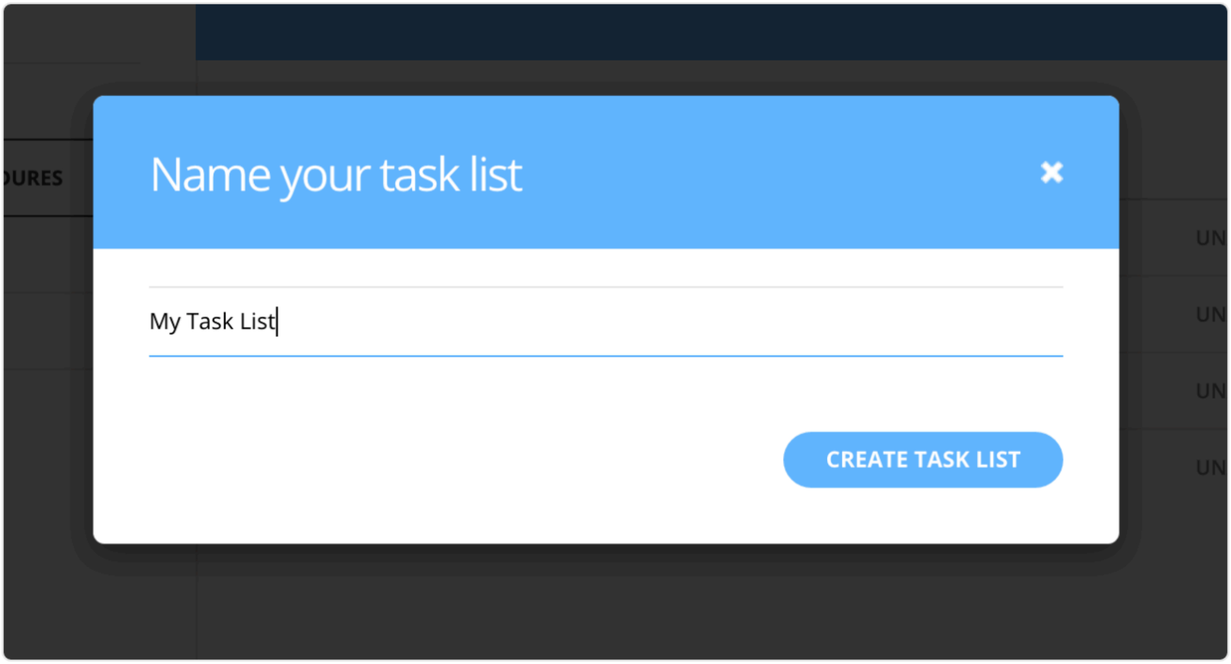
Once here, click on the **TASKS** section on the left menu.



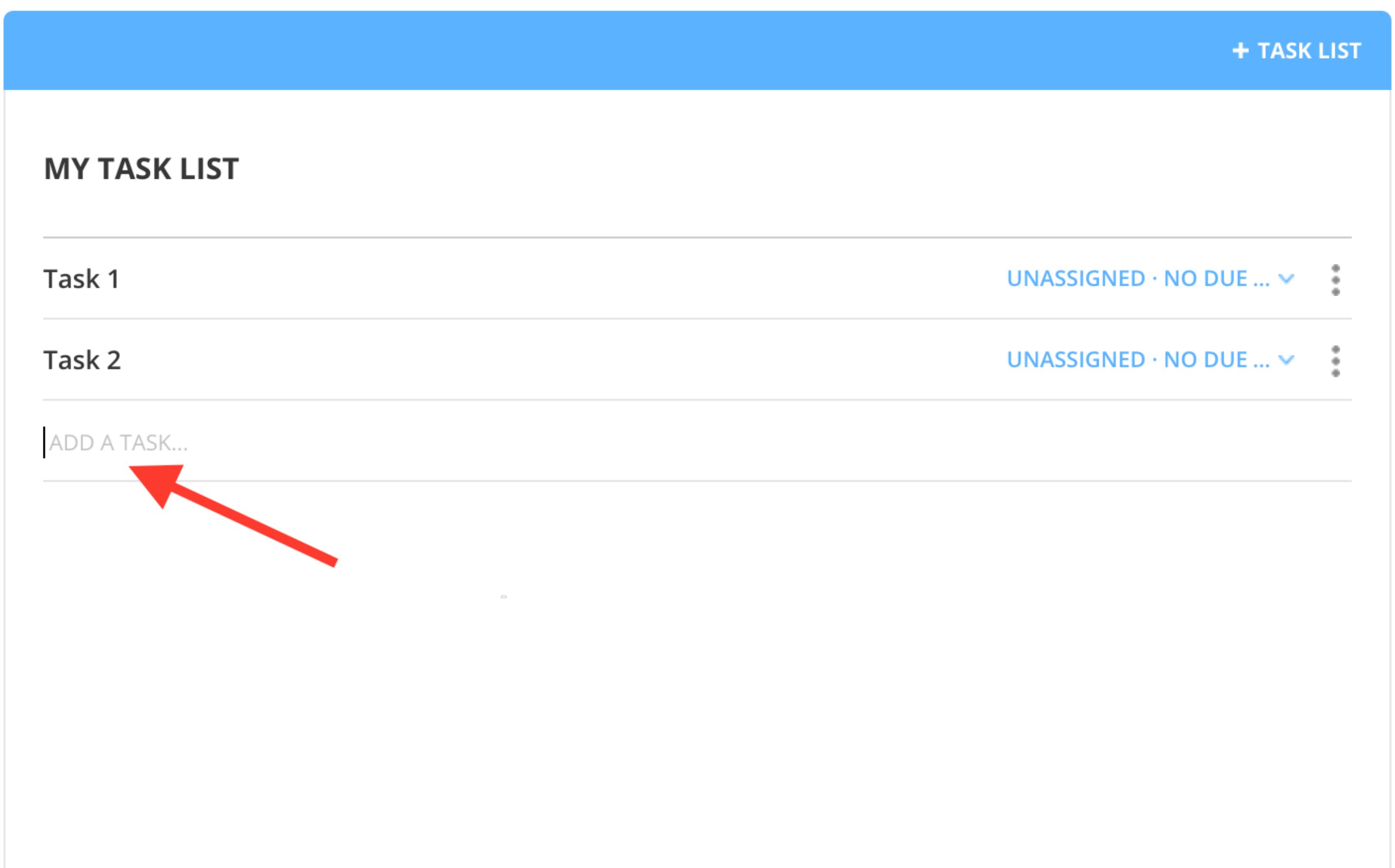
Here we will see any task lists we have already. To create a new one, click **+ TASK LIST**.



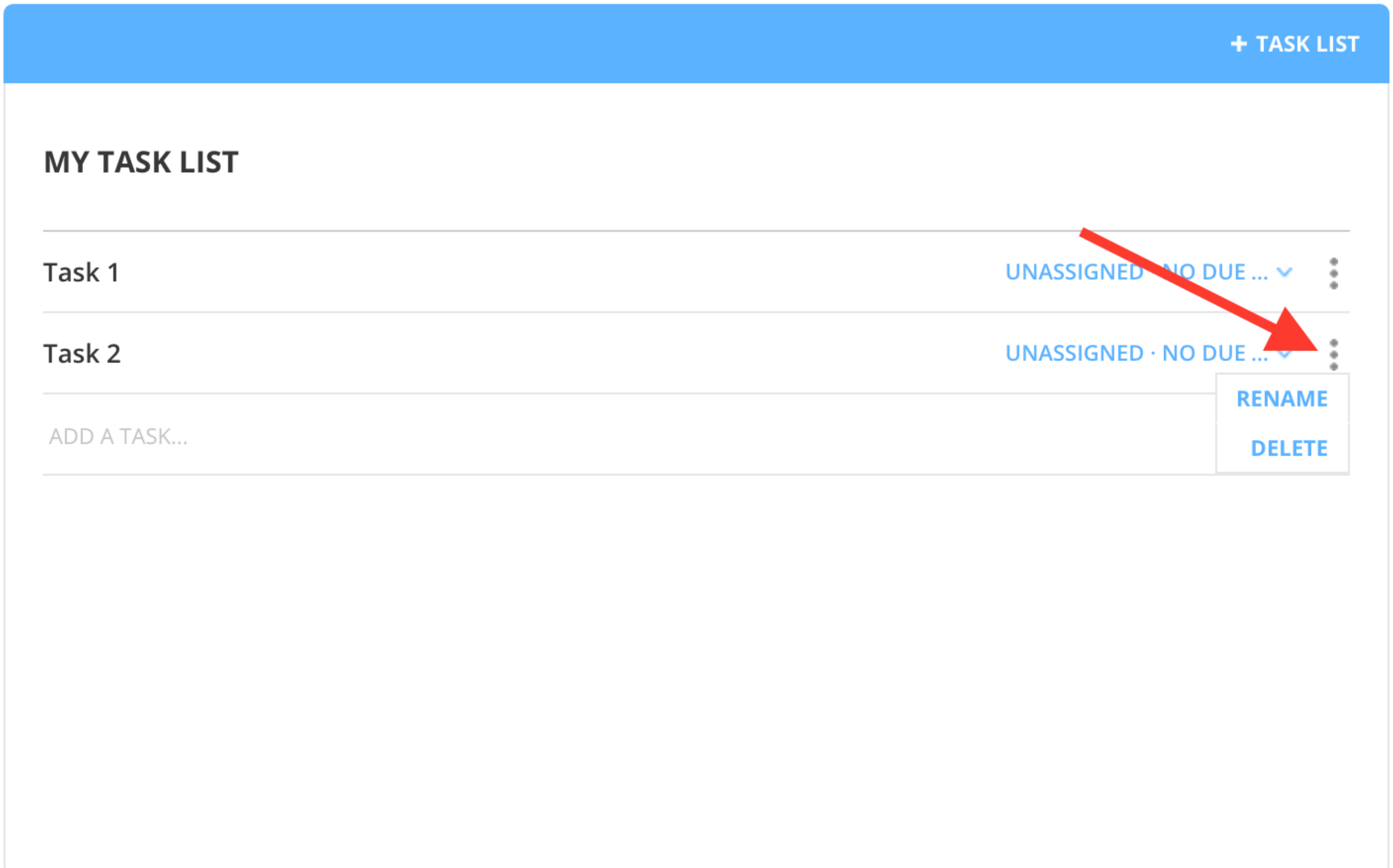
First, we will name our task list.



Now, click **ADD A TASK**... to start adding tasks to the list, hitting enter (or return) on your keyboard when you are done typing the task name.

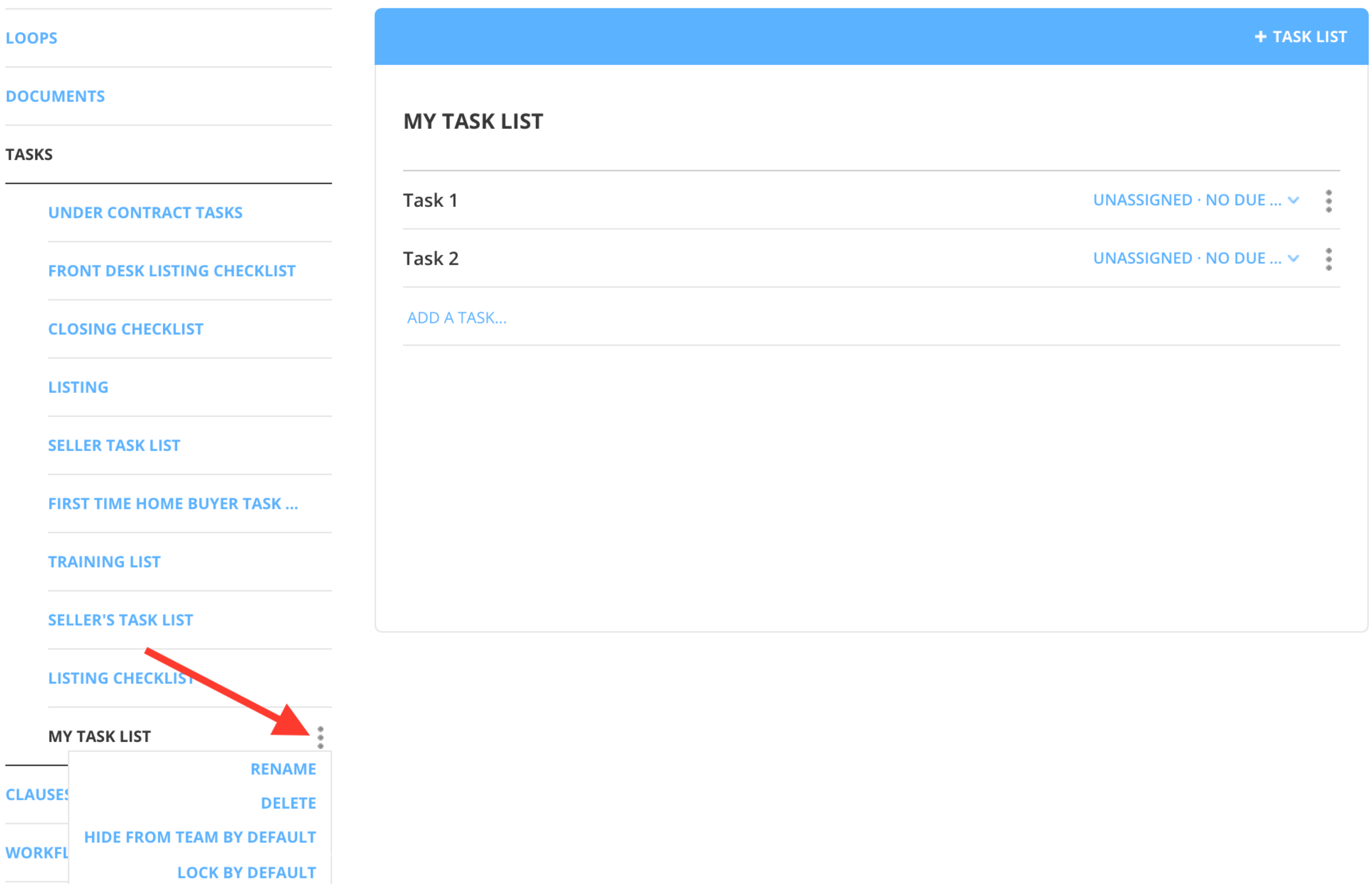


Each task you make in your list can be removed or renamed by clicking on the options icon to the right of each task.



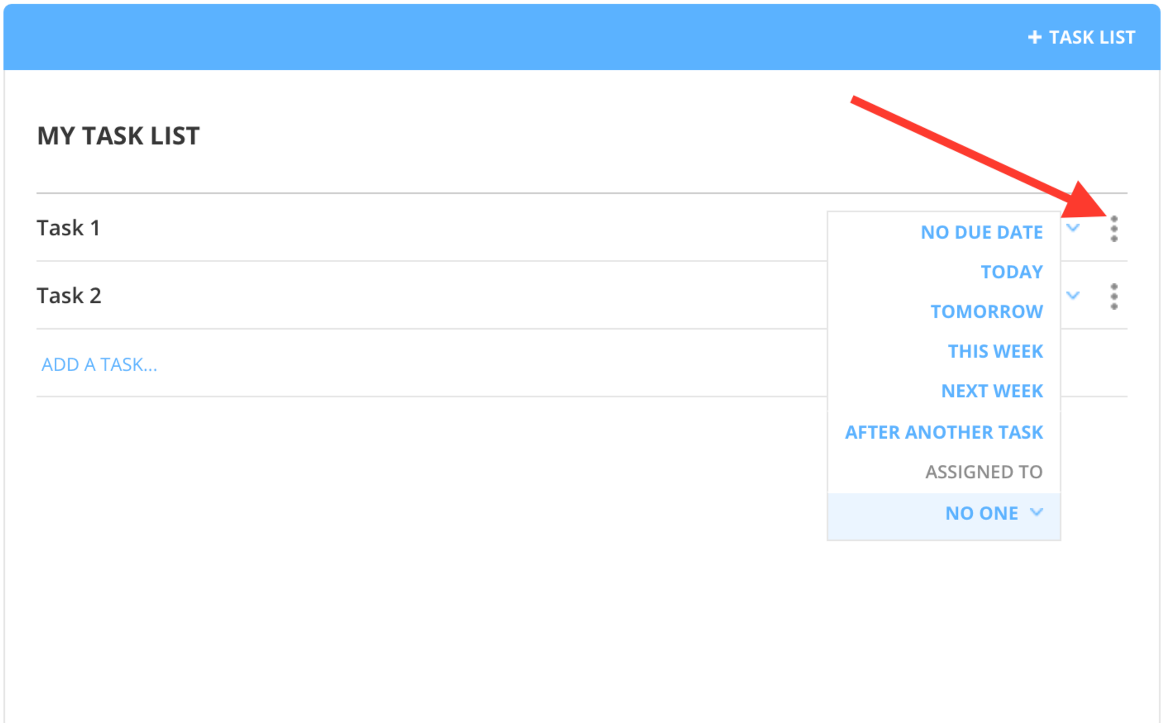
We also can manage the options of the entire list on the left, clicking on the options icon for the list itself. You will be presented with a few options here.

- Rename: this will allow you to rename the task list.
- Delete: this deletes the entire task list (and cannot be undone).
- Hide from team by default: this option will hide the task list from anyone in your loop that would normally have access to view it (i.e. people who are listed as *on my team* in a loop, such as people you have added to your team or admins).
- Lock by default: this allows anyone on your team in a loop to be able to see your task list, but not be able to edit it.

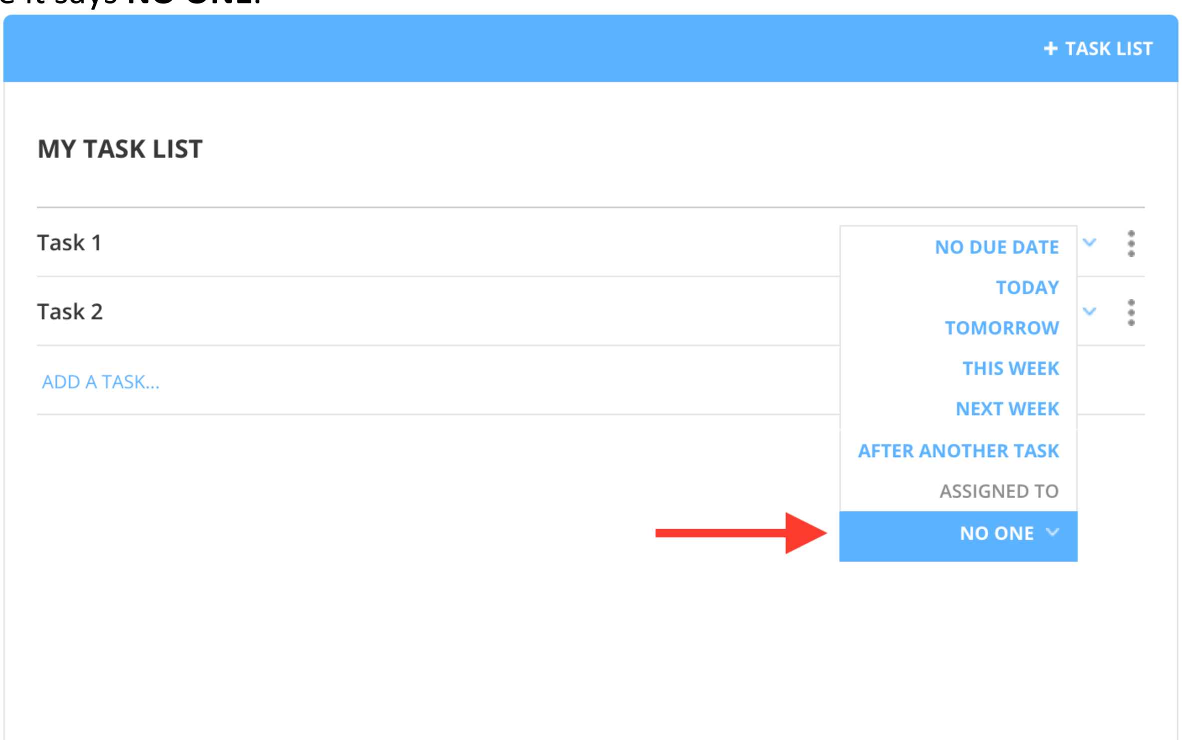


Assigning tasks

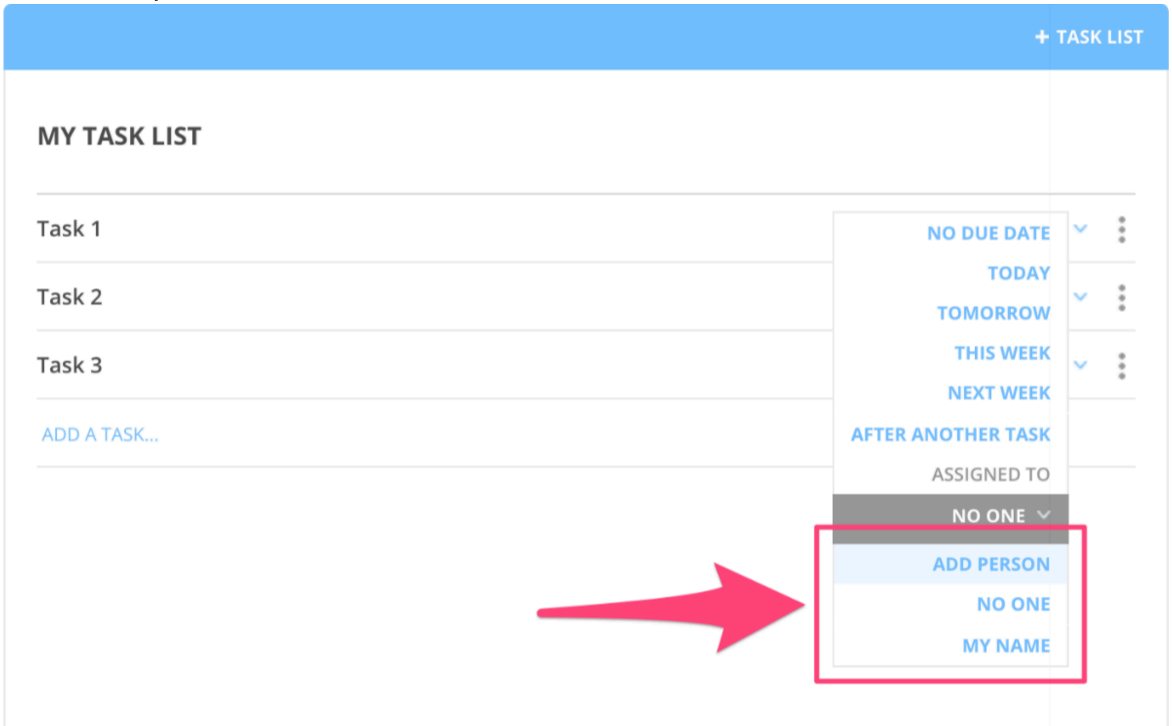
The tasks within our task templates that we create can by default be assigned to a specific person when it is brought into a loop. We can also set up specific due dates as well for each task.
These options are found for each task in our list via the down arrow on the right side.



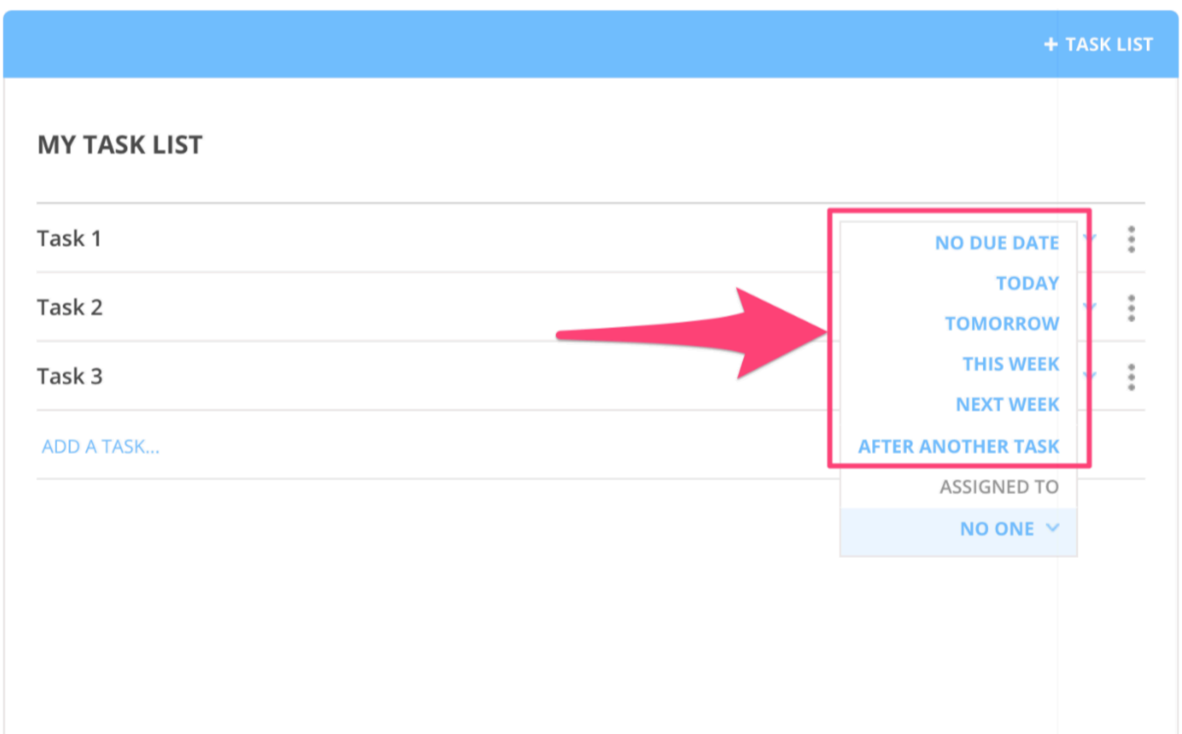
To assign a task to a person, click on where it shows **ASSIGNED TO**. In this case, I am clicking on where it says **NO ONE**.



I will now be able to assign this task to myself, no one, or I can add a person to assign the task to. We will note that in assigning a task to a person, they will be added to the loop each time this task list is added, and this loop will be added to their account, notifying them that they have a task to complete.



Selecting a due date for the task can be done within the same menu. We can select a specific time frame here, or choose to make the task due after another task on the list has been completed.



Brokerage provided task lists

Task lists you create as an admin for your agents can be used by any agent in any loop. They will not be editable by agents until they are added to a loop.

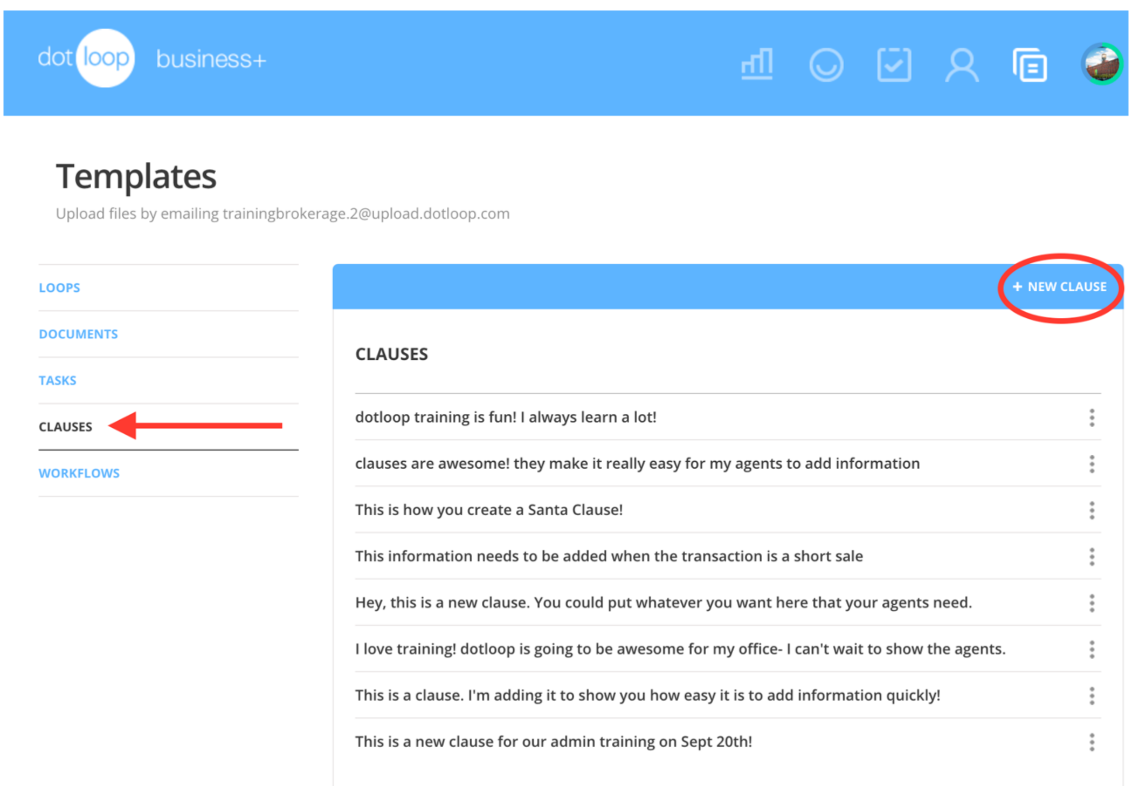
Pro Tips

- Tasks can be re-ordered in any list you have created by clicking and dragging the task to the position you wish to add it. Once done, it's complete, no need to save!

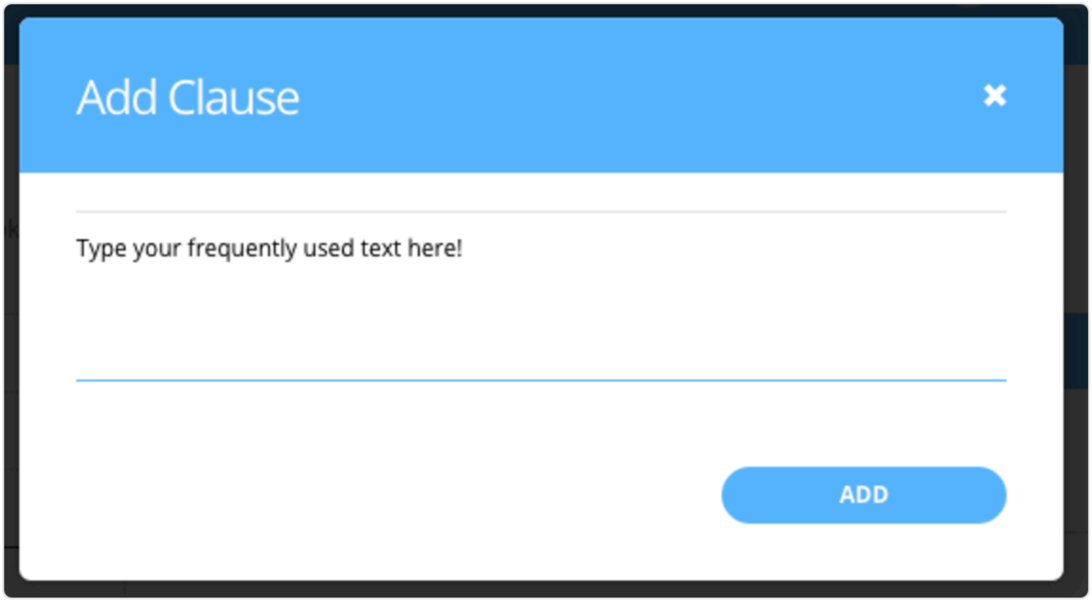
clauses:

With the Clause manager, you can save your commonly used text for easy use later.

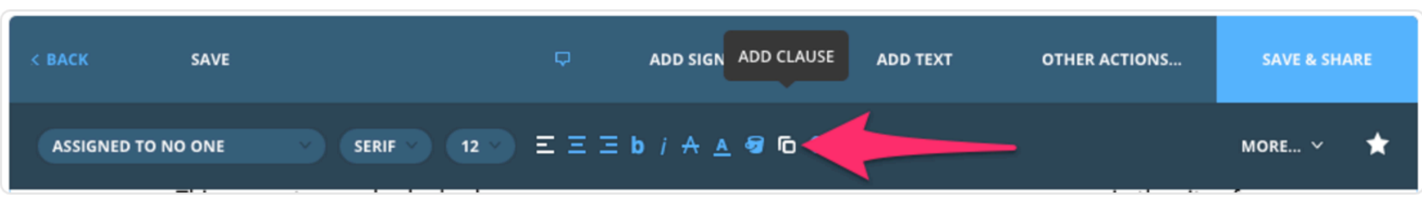
If you have commonly used clauses and find yourself typing them in over and over, then clause manager is for you. Create your frequently used clauses in the clause manager under your templates section and each time you fill out a document you have the option to enter a clause in the text fields.

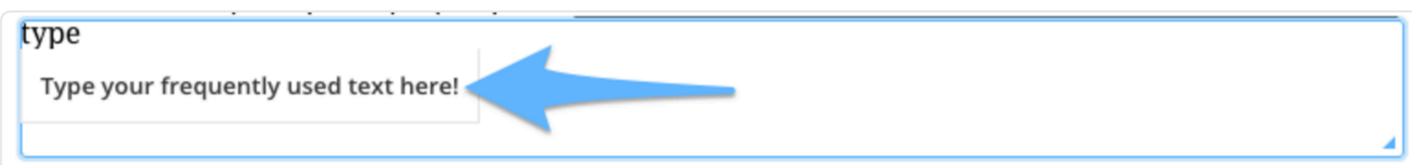


Create your new clause by typing in the default information you wish to save and populate each time and save.



Clauses can be added one of two ways into a text field. They can be manually added by selecting the clause icon with a text field selected or by beginning to type the clause we will suggest the rest for you. Only clauses that will fit within the currently selected text field will be suggested.





workflows:

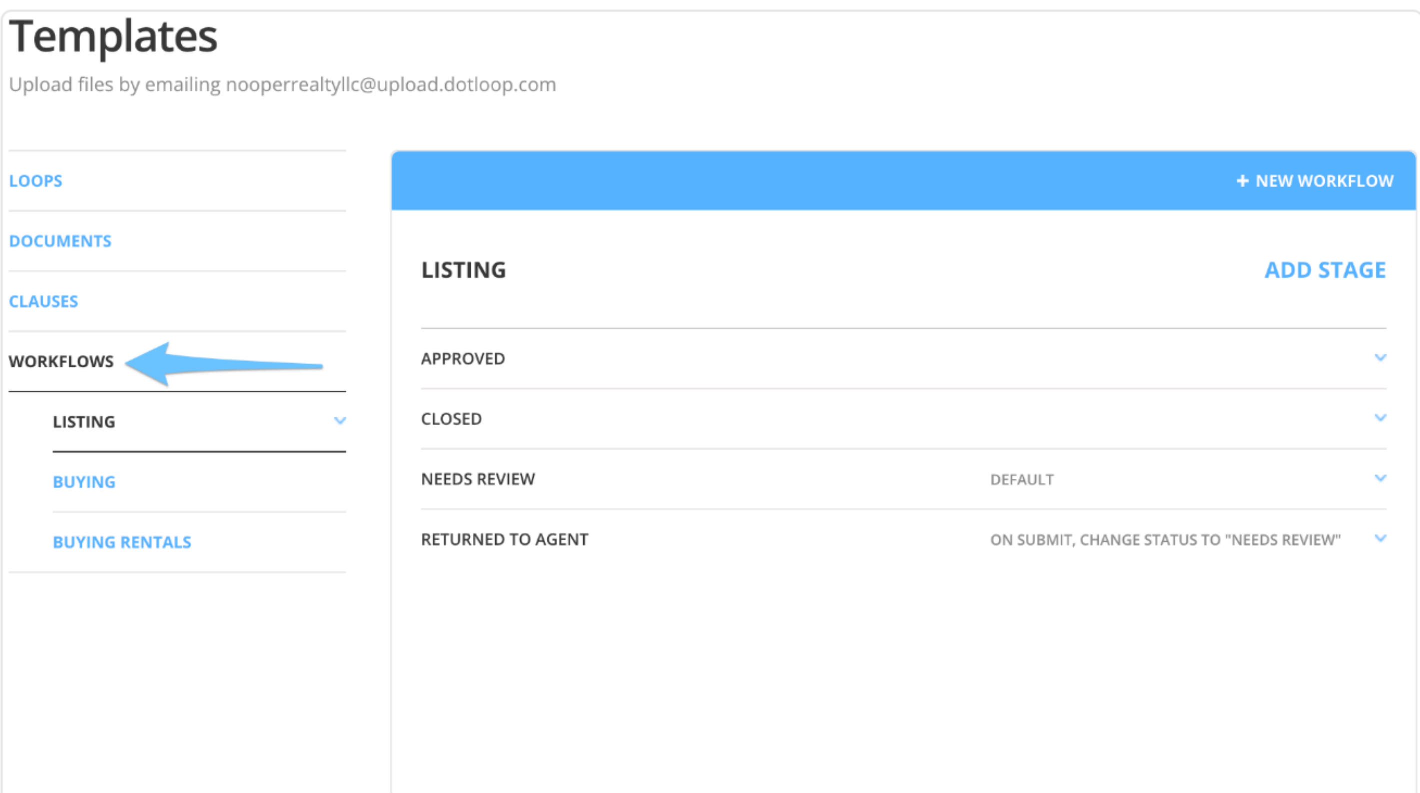
Compliance workflows are at the heart of your business account's day-to-day functions. Workflows are the tool in dotloop that move your agent's folders into the next review stage, when they submit those folders for review.

Understanding workflows:

At first glance, you may have noticed that review stages from your workflows are a part of your loop filters and you've most likely seen loops 'tagged' with these stages. Being able to filter and search for loops based on workflow stage is just the beginning of how workflows actually work in dotloop.

When an agent starts a loop, that loop is not in any compliance status, or stage. This is because sometimes loops are completely arbitrary and you, as the admin, need not be bothered by these loops. However, once an agent has decided that a loop is ready for your review, they will click the "Submit for review" button in that loop. This triggers the workflows for your compliance statuses that you have set up!

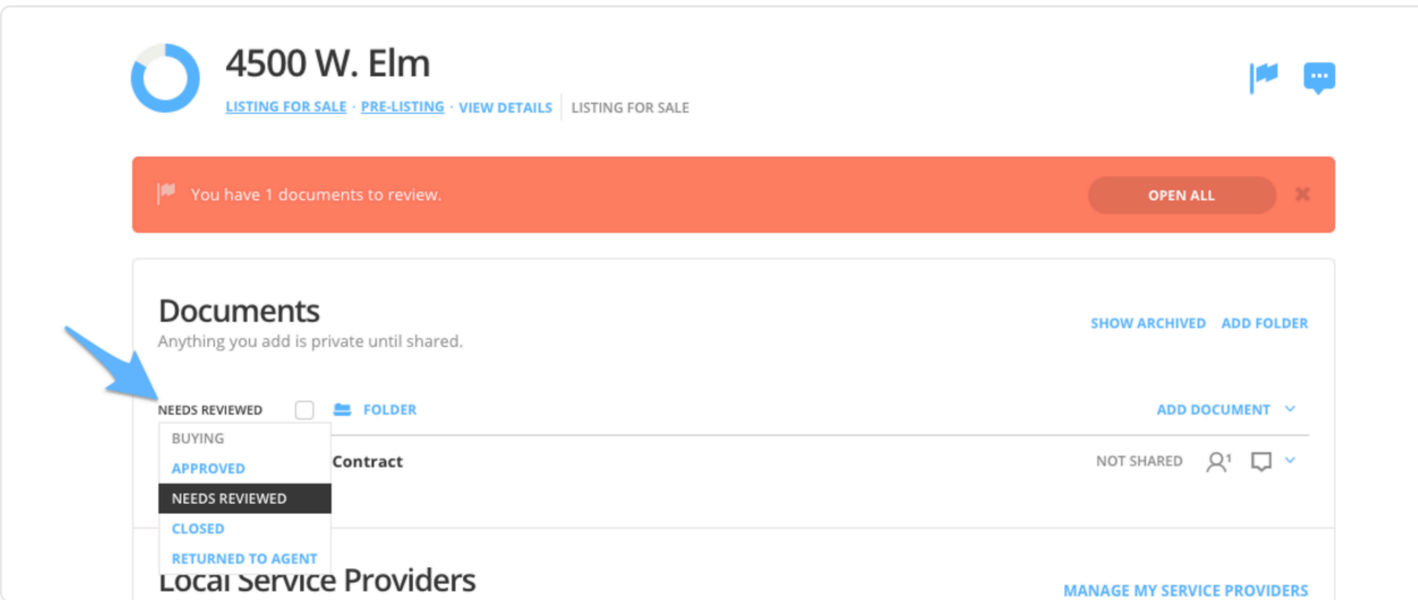
Your compliance workflows are located in your business+ account's templates section:



Above, you'll see we are looking at review stages for listing folders, or the **Listing Workflow**. When agents submit for review, they are asked for the type of folder they are submitting. Assuming they choose listing, the **Listing Workflow** will be triggered.

You'll notice, **Needs Review** is set to default. That means the very first time an agent submits their folder for review, and chooses that it is a listing folder, it will default into the **Needs Review** stage. In addition to updating the compliance status of this folder, you as the admin will also receive a notification confirming that a loop has been submitted into **Needs Review** status.

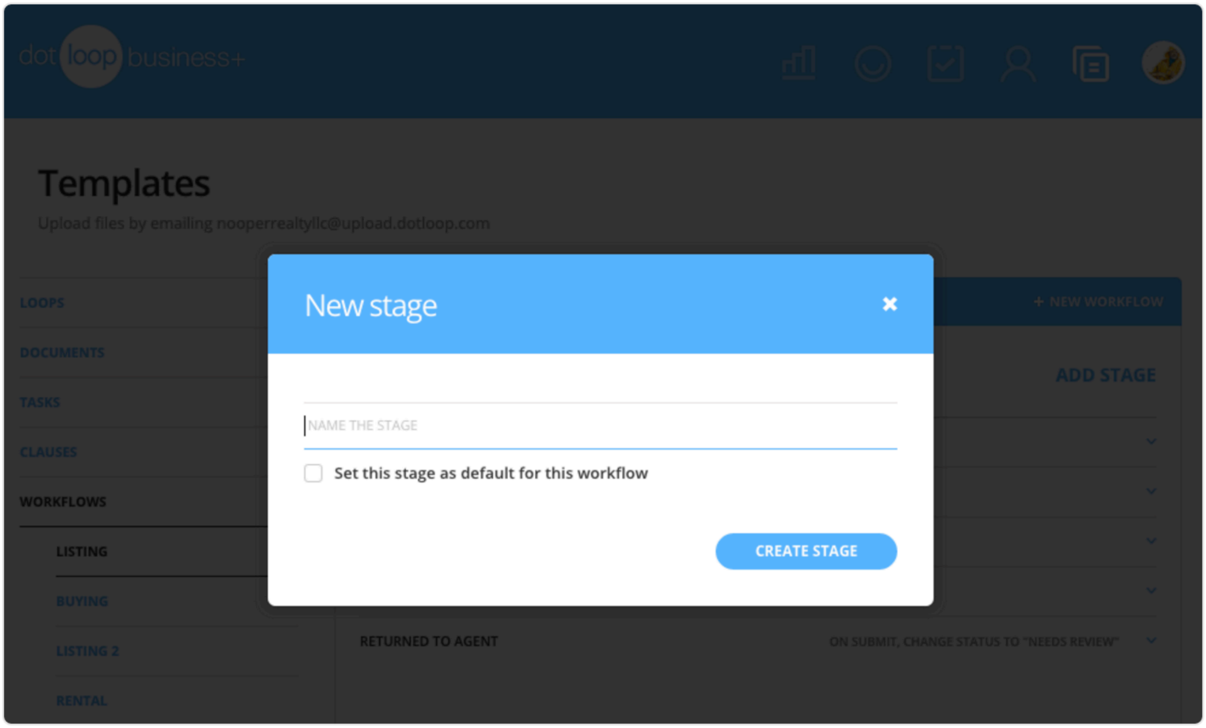
From here, you will review the folder. When you are reviewing the folder, you choose what compliance stage the folder should now be in.



From the drop down, if you were to place the folder into the **Approved** stage, you'll notice from the first image above that there is no resubmit logic (we'll get to resubmit logic in a moment) – no place for the folder to go. In this scenario, a folder that is in the **Approved** stage will remain in the **Approved** stage even if the agent submits the folder for review again. However, in this scenario, if you were to place this folder into the **Returned to Agent** stage, the folder would 'flow' into the **Needs Review** stage whenever the agent submits the folder for review. After all, a folder that has been returned to the agent will most likely need to be reviewed again after changes were made!

By default, dotloop sets your business+ account up with fully functioning workflows for Buying and Listing transactions. While these may suit the needs of many accounts, we also give you the option to completely customize your workflows.

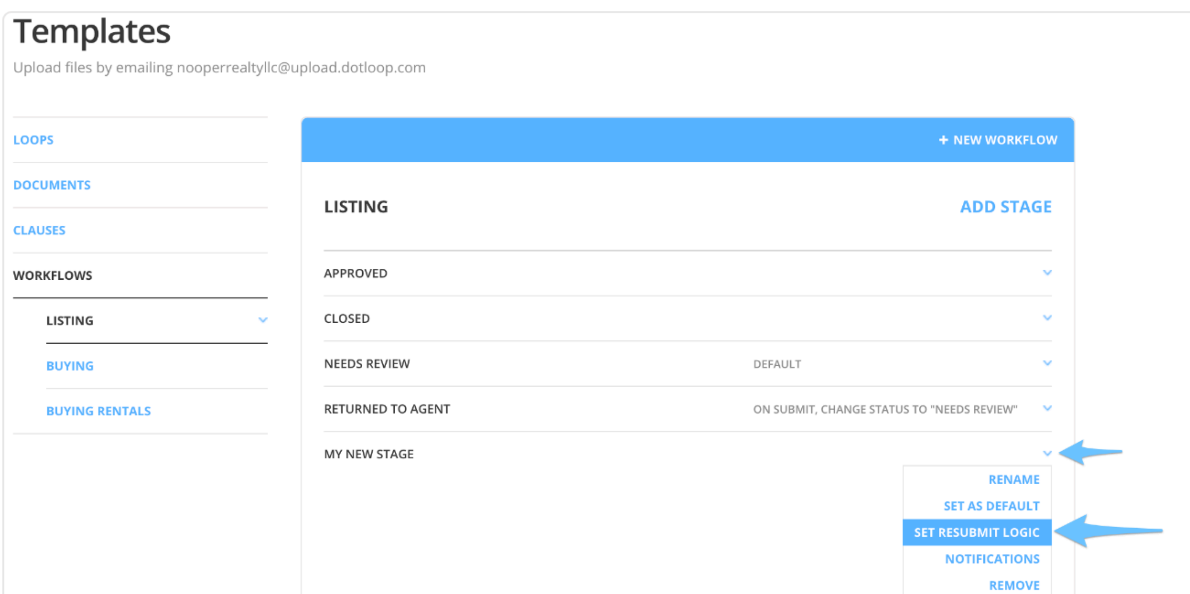
Adding stages to your workflows:

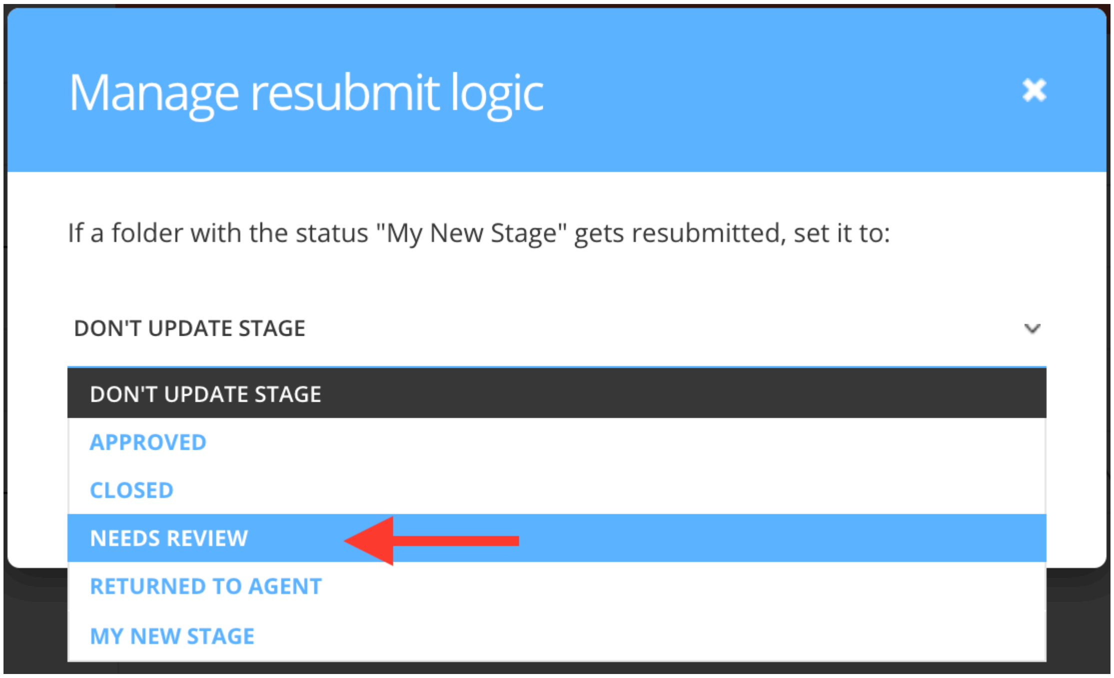


When you add a new stage to your workflows, choose a name that describes the stage. You also have the option to set the stage as a default stage, which we talked about above. Clicking **Create Stage** will result in that stage now being listed in this workflow. In this example, it would be created in my *Listing* workflow.

setting resubmit logic for stages:

Resubmit logic is really just how a folder's stage will flow into another stage when an agent submits that folder for review.



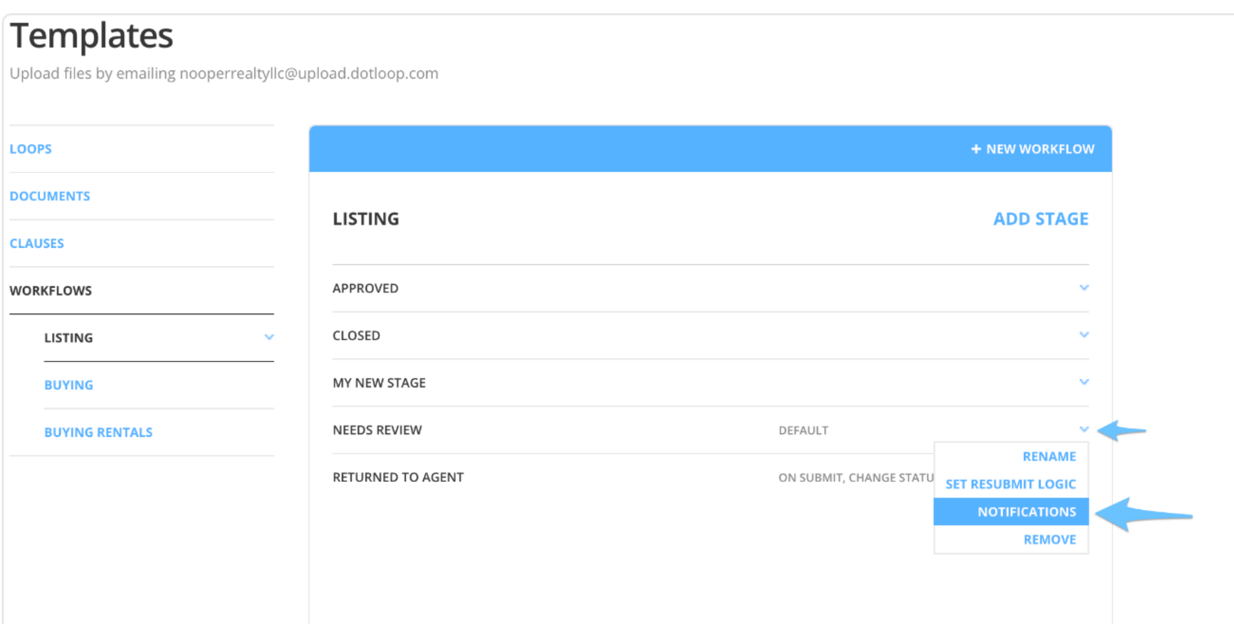


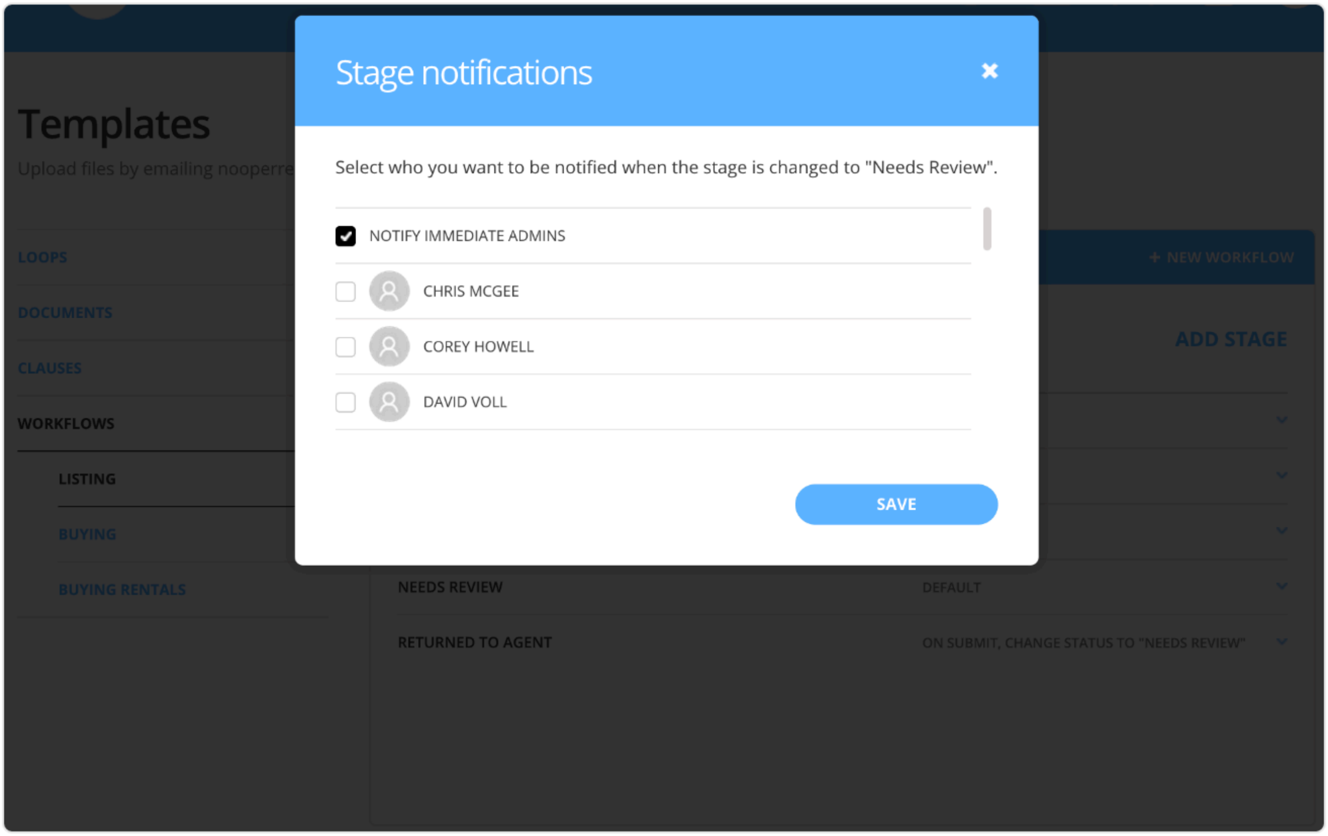
Above, I have chosen to set the resubmit logic for a stage I created, **My New Stage**. I want this status to change to *Needs Review* when the agent submits a folder that is in *My New Stage* for review. It's as simple as that.

Alternatively, you can clear any logic already applied to a stage by clicking **Clear Resubmit Logic.** For example, if you have resubmit logic set up for your **Approved** stage, you could clear the logic because you most likely do not want agents changing **Approved** folders.

You can alter or clear the resubmit logic for any stage.

Custom notifications for workflow stages:



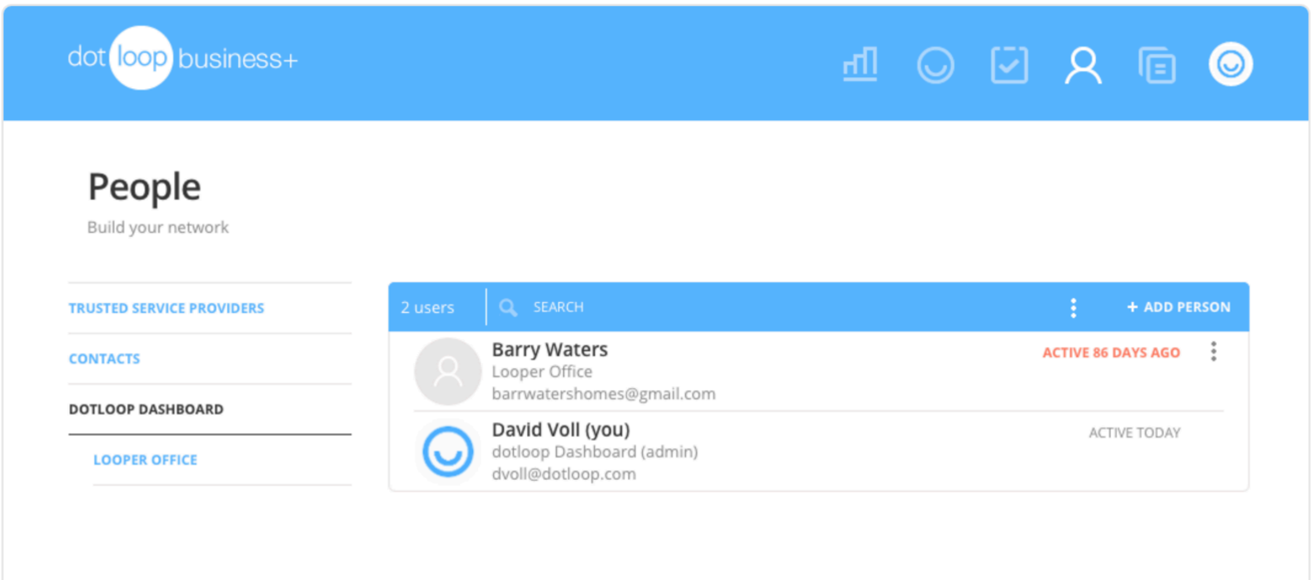


In this scenario, I have chosen that I want all of my immediate admins to be notified when a folder's stage is changed to **Needs Review**. In this case, it is not necessary to checkmark any of my admins because they're all getting the notification. However, let's say there is a review stage that you only want one admin to see notifications for. You would simply only checkmark that particular admin. You and your other admins would not be notified when an agent's folder had moved into that particular stage. You can do this with any review stage.

people management:

The people management feature allows admins a view of all agents in the brokerage, the ability to add and remove agents, and to grant admin access to the brokerage.

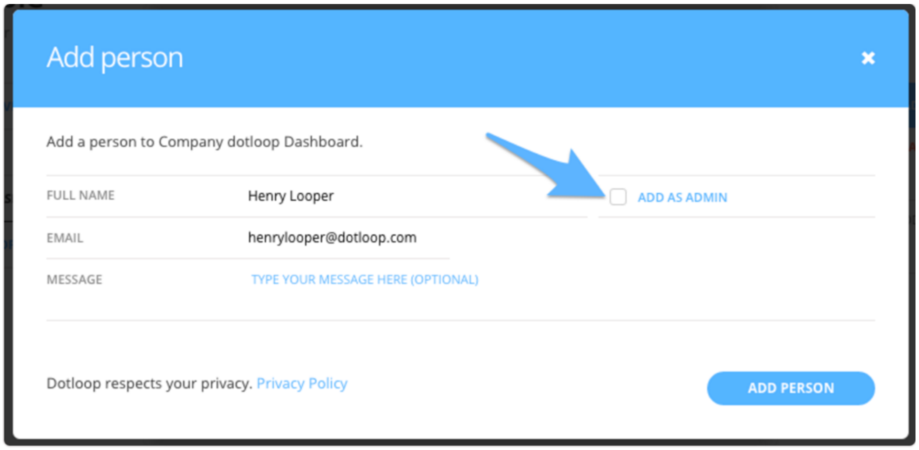
Note: in this example DOTLOOP DASHBOARD is what is called the Company; this is where you will typically add admins (unless your company has multiple offices). The indented option named LOOPER OFFICE is what is called the Office; here you will add your agents and office level admins.



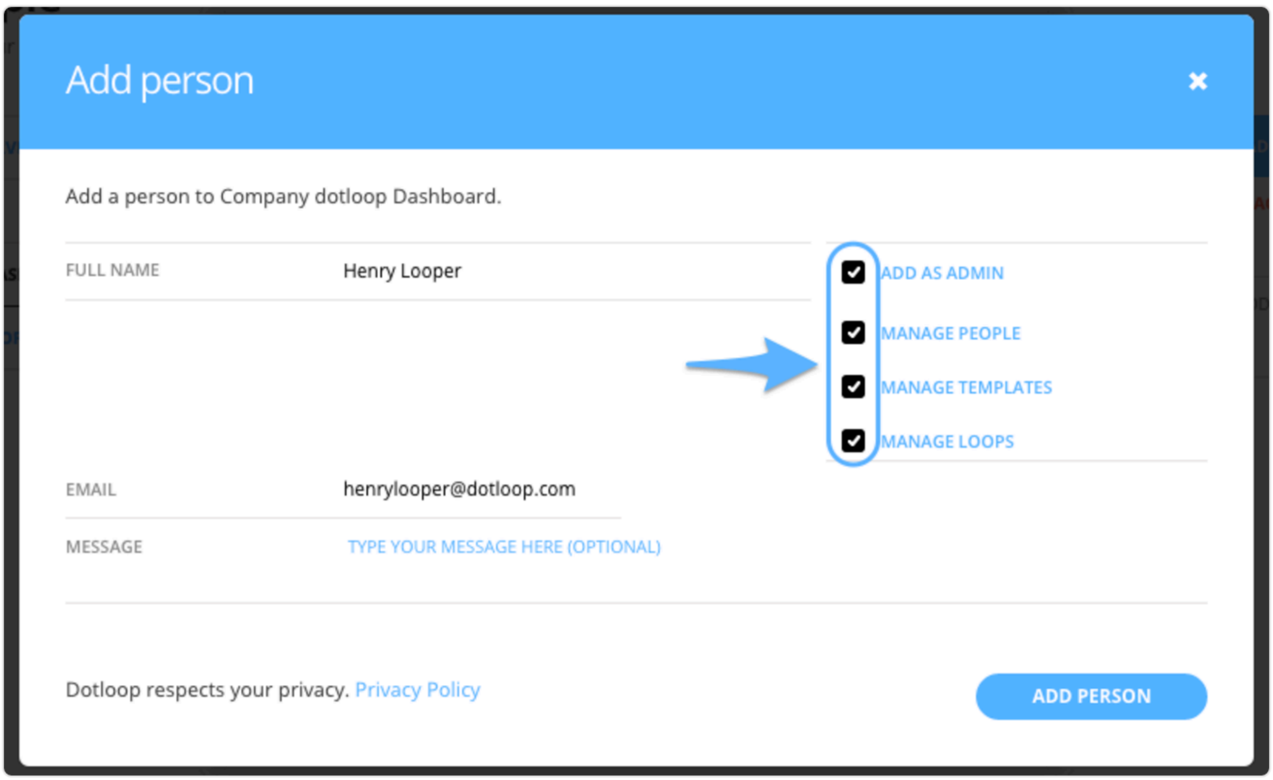
- Easily view if an agent has logged in and how recently.
- Upload an agent roster to quickly set up your agents and attach them to your brokerage.
- Create a custom message for your agents welcoming them to dotloop.

adding new admins:

To add new admins to your brokerage, first make sure your brokerage name is selected in the left hand navigation menu (the Company option), then click “Add Person”. Here you will enter in the user’s details including Full Name and Email, select “Add as admin” and enter in a custom message welcoming them to dotloop!

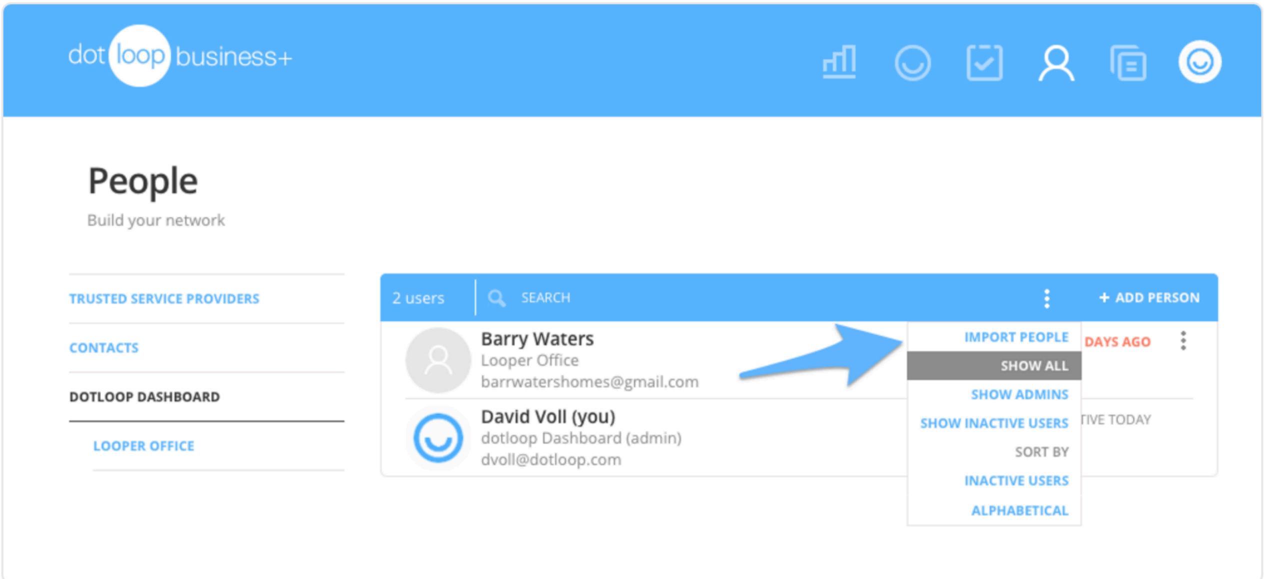


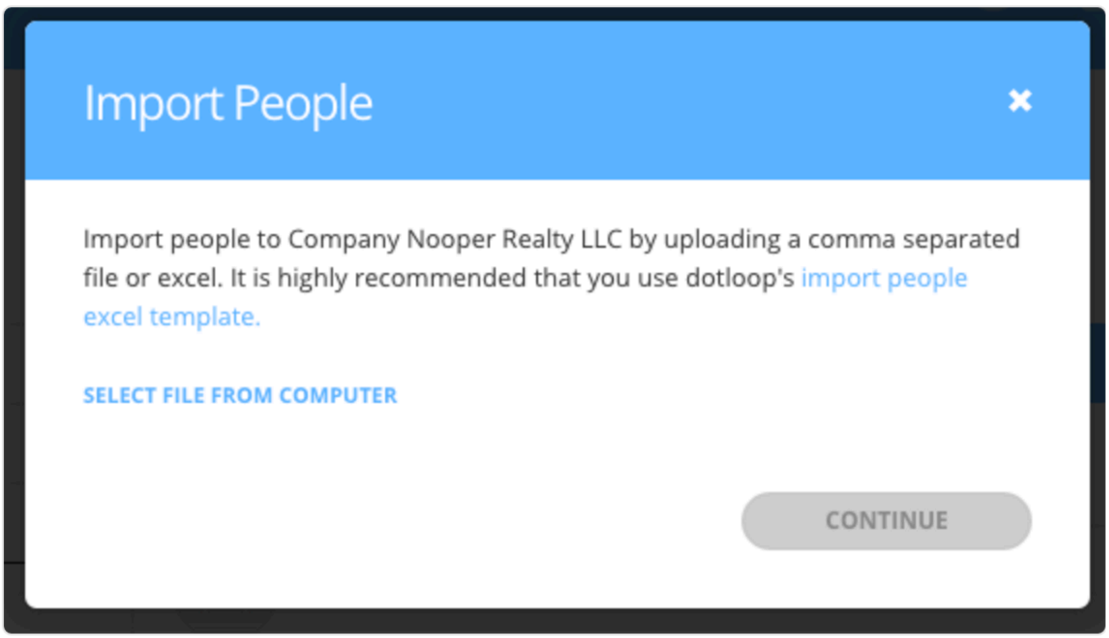
You'll notice that when checking the box to add as admin, some new options appear. With these check boxes, you can limit what admin rights the person you are adding has.



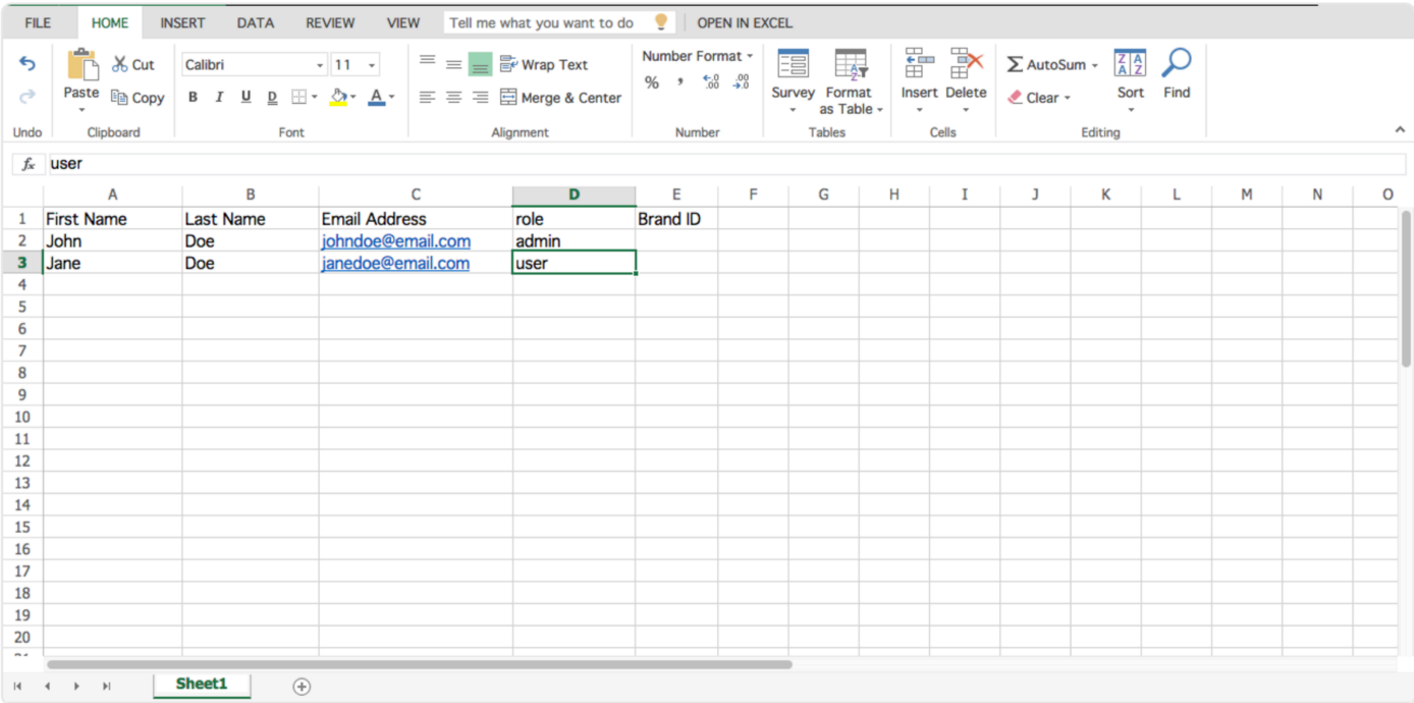
adding multiple agents:

To import a list of new agents, begin by selecting the office you wish to add them to in the left hand navigation menu, then from the drop down menu next to "Add Person" click import people. From the import people window you will be given the option to download our import template file or upload one when your ready.

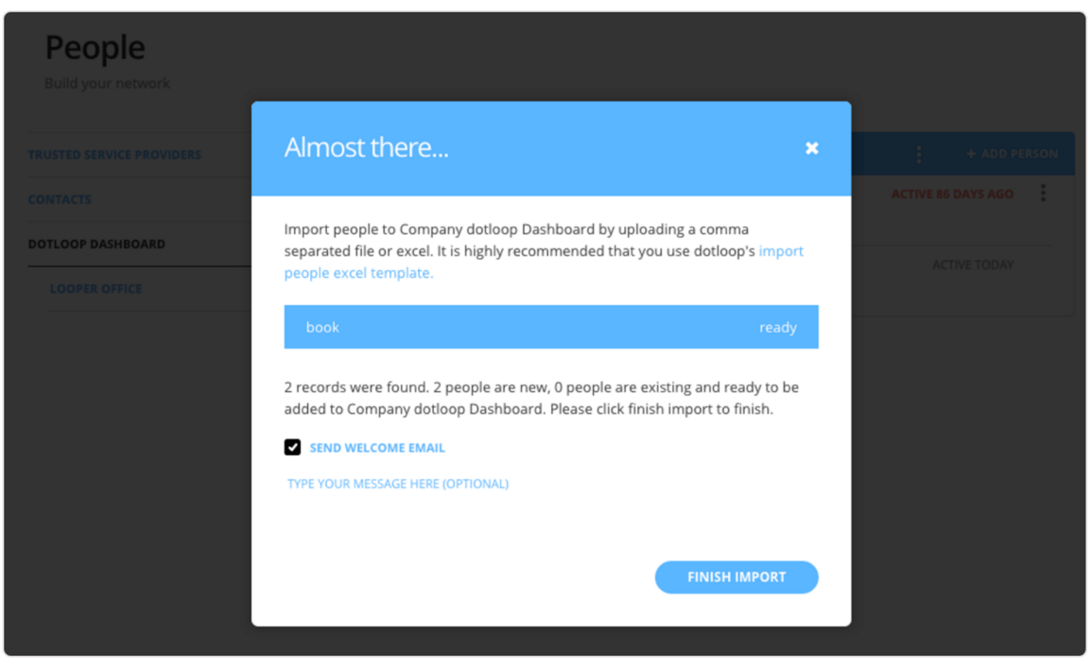




Follow the same format seen in the example template: First name, Last name, email address and role. The role column controls what level of access the user will have. The “admin” role automatically gives the user an admin profile for your brokerage or office depending on your selection in the left hand menu, the “user” role will give them and agent account attached to your brokerage. Lastly, we will need to make sure to include a column for Brand ID. This column is where you can add your agents associated Brand ID if applicable. If not applicable, this column must still be included on the form (and can be left blank).

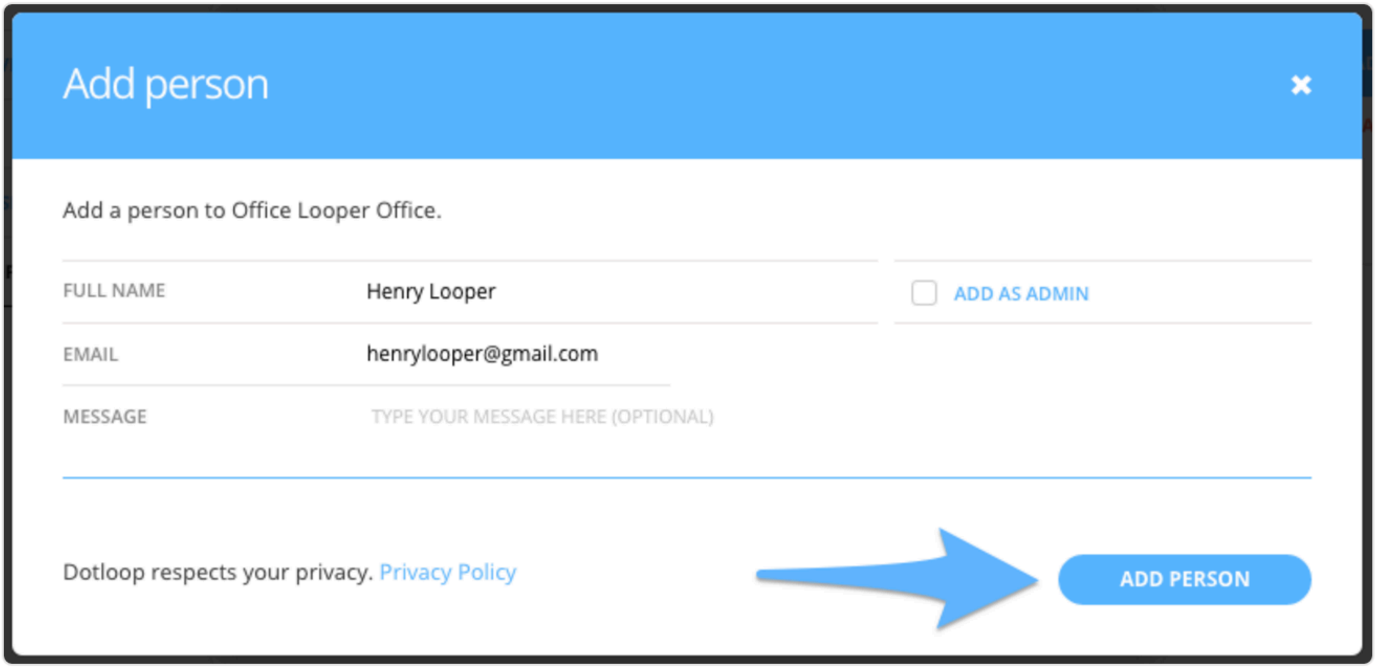


Once the template is successfully uploaded you will receive a confirmation message, this message includes the number of recognized users and any duplicates the system sees. Any duplicate users will not be added to your brokerage. You also have the option to send a custom message to the new users welcoming them to dotloop. Upon receiving the welcome email users will see your custom message and a link taking them to their account registration page where they will create a password and log directly into their new account attached to their brokerage.



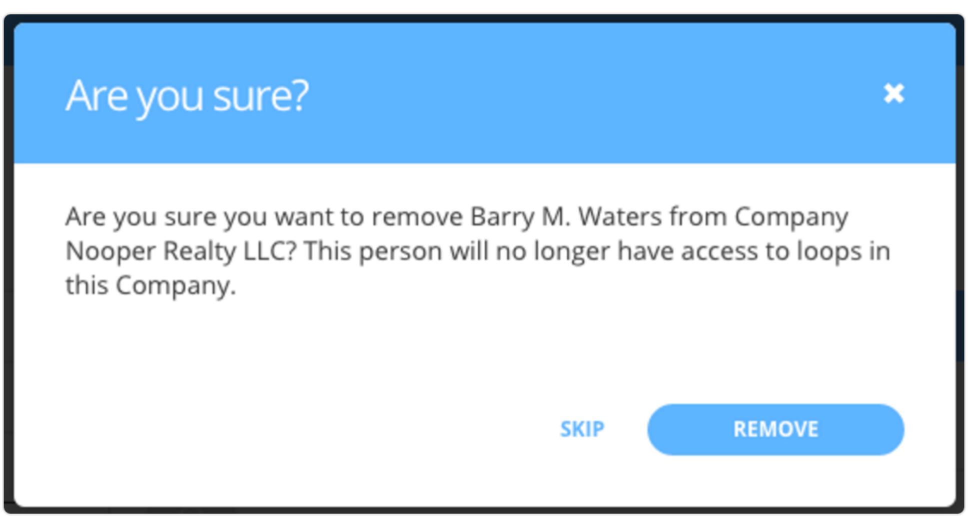
adding single agents:

Adding a single agent is similar to adding an admin. Make sure to select the office from the menu on the left, and select "Add Person". Type the persons Full Name and Email, leaving "Add as admin" unchecked. You can also type a custom message here. Last, click the Add Person button at the bottom right, and this will send an into email to your new agent!



removing people:

If you need to remove any users from your brokerage use the "Remove" option from the drop down to the right of anyone under your people management section. Click to confirm your choice and the user will no longer have access to the loops or documents created under the profile associated with your brokerage.



Pro Tips

- Some agents already have dotloop accounts, this is ok, just simply ask them what the email address on their account is.
- If you have added an agent with the incorrect email, simply remove them, and add them again with the new email.
- If you notice the agents profile appears to not be connected to the office, even though you just added them, ensure that they have the proper profile selected, or that they are logged in with the correct email address.

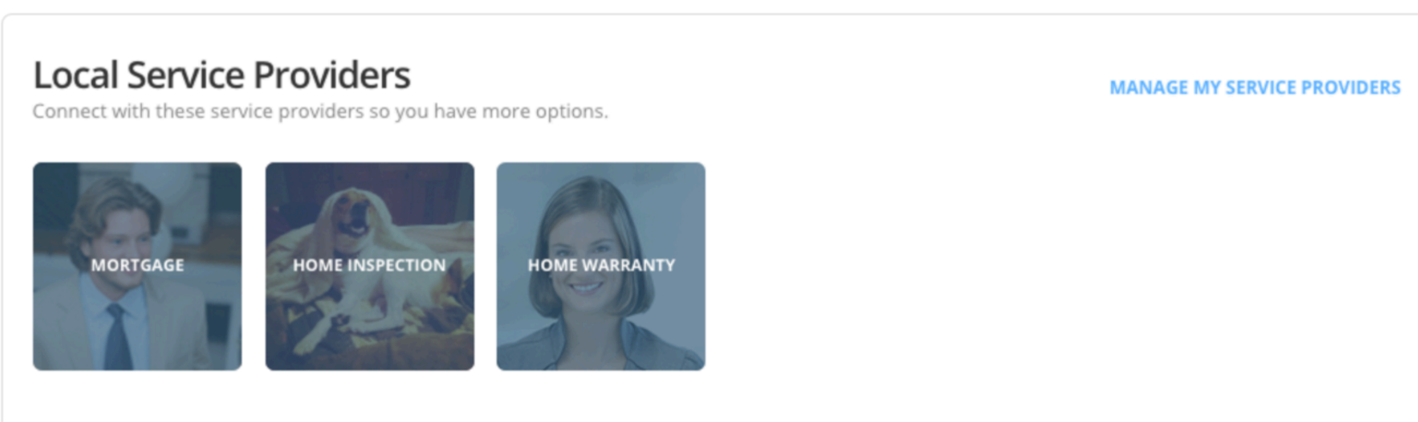
TSPs

dotloop has a built-in section within your account where you can keep a rolodex of service providers you work with on a regular basis. Adding your Trusted Service Providers means connecting your home buyers and sellers with the service providers you trust and recommend. It's like the list of service providers you already provide to clients without the paper and hassle.

With your business+ admin profile you can create brokerage level Trusted Service Providers that will appear in all of your agent's loops. If any of your agents would also like to add service providers, they commonly collaborate with they have the ability to do so as well.

how do Trusted Service Providers work?

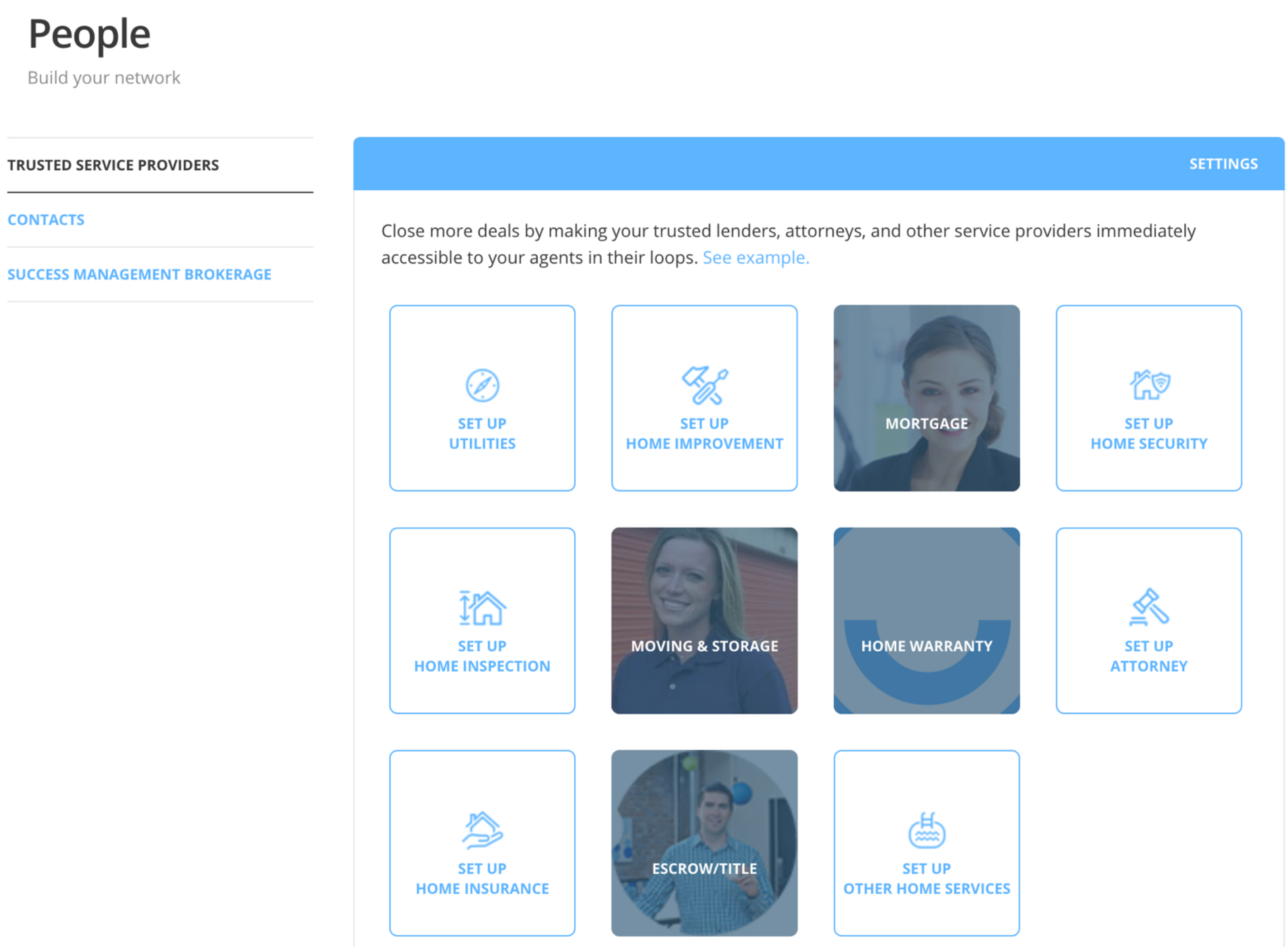
Trusted Service Providers are people in your industry who can provide services to your clients, such as lender or moving services for real estate. When you connect with a Trusted Service Provider, they appear in all of your loops with convenient icons that display their provided service.



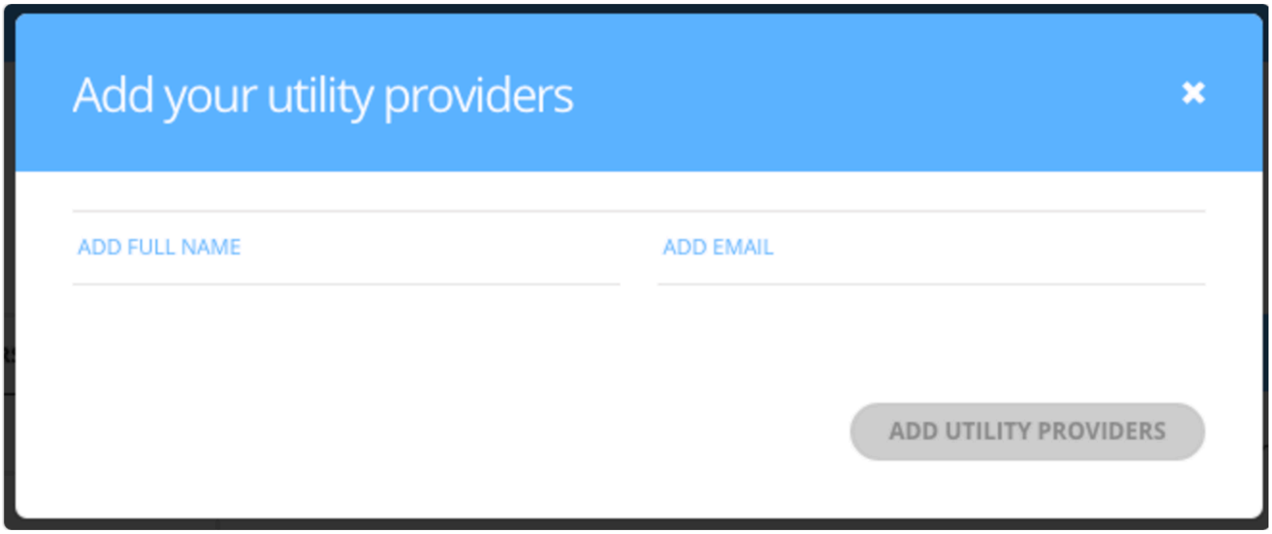
Before you click on an icon, only you will see the Trusted Service Providers in your loop. Clicking on the service icon and selecting a service provider will pull them into your loop with your clients, and you'll actually see the connected Trusted Service Provider added to the People section of your loop. The service provider will receive an email stating you want to connect with them, and that's it! Once they are added to the loop, you can begin sharing documents between you, your clients, and the Trusted Service Provider.

adding your Trusted Service Providers:

Navigate to the People Section of your account, the icon is a little head and shoulders in the middle of the six icons to the top right of any page in dotloop. From here you will immediately be placed in the Trusted Service Providers portion of your People Section.



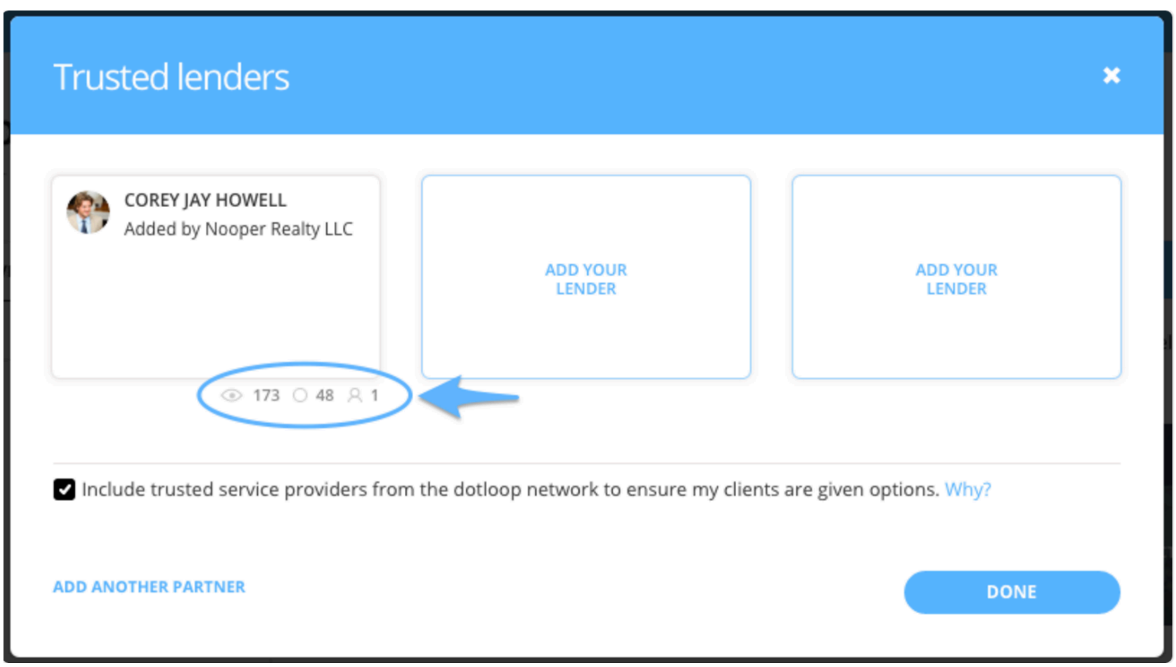
Choose the proper industry for your new Trusted Service Provider and simply click the Add button. You will be prompted to enter their information.



Click Add Provider (this text will also display the type of provider selected) once you have completed filling out the necessary information.

Your service providers' loops and connections:

Within the People Section of your account, when viewing your Trusted Service Providers, you can view how many loops they've been included in and how many connections have been made in the past 30 days.

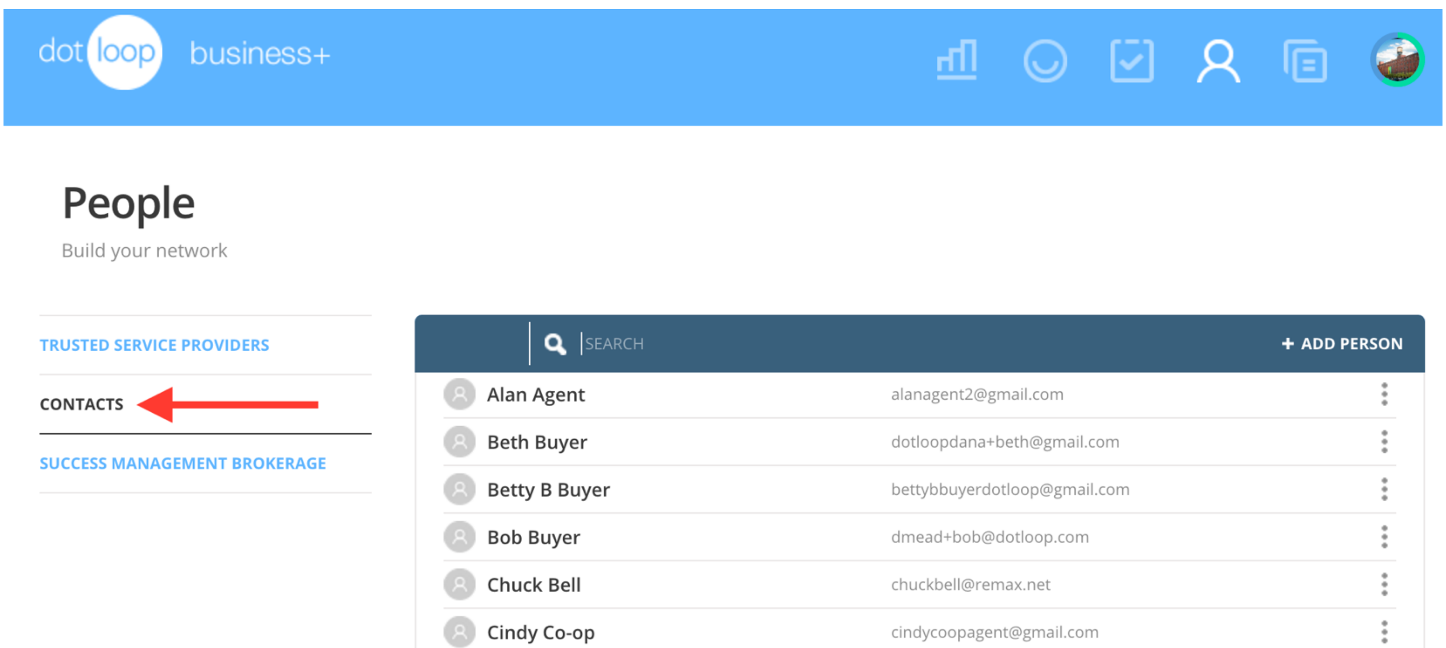


contacts:

The Contacts Section of your dotloop Business+ account is a powerful tool that remembers every contact you've added to a loop, it also has the ability to autofill any previously added contact's information to documents within your loop.

Whenever we add anyone to a loop we will enter their first and last name, typically their email address, and their role. dotloop takes this information and uses it to autofill your documents for you, but it also adds this person to your Contacts. This is important because any time you add that same individual to a loop in the future, dotloop will predict their information after you key in a few characters of their name or email.

You can always view your contacts by clicking the the People icon at the top right of any page in dotloop. Once in your Contacts, you have the ability to edit their information or delete them, by clicking the dropdown to the far right of their name.

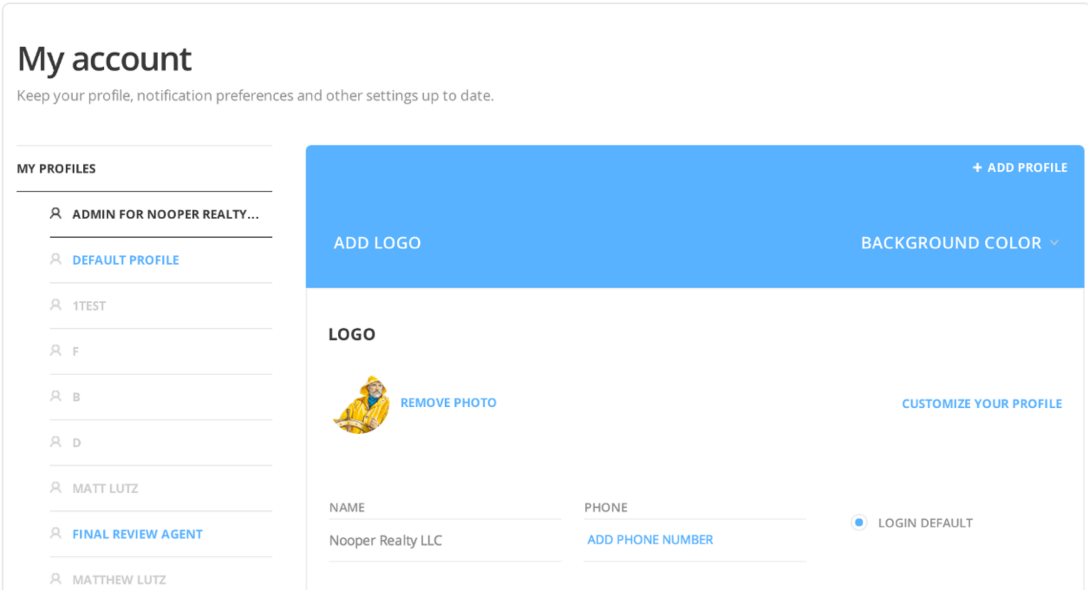


You can also add a Contact here to keep a record of their information or to use in a loop later by clicking on +Add Person.

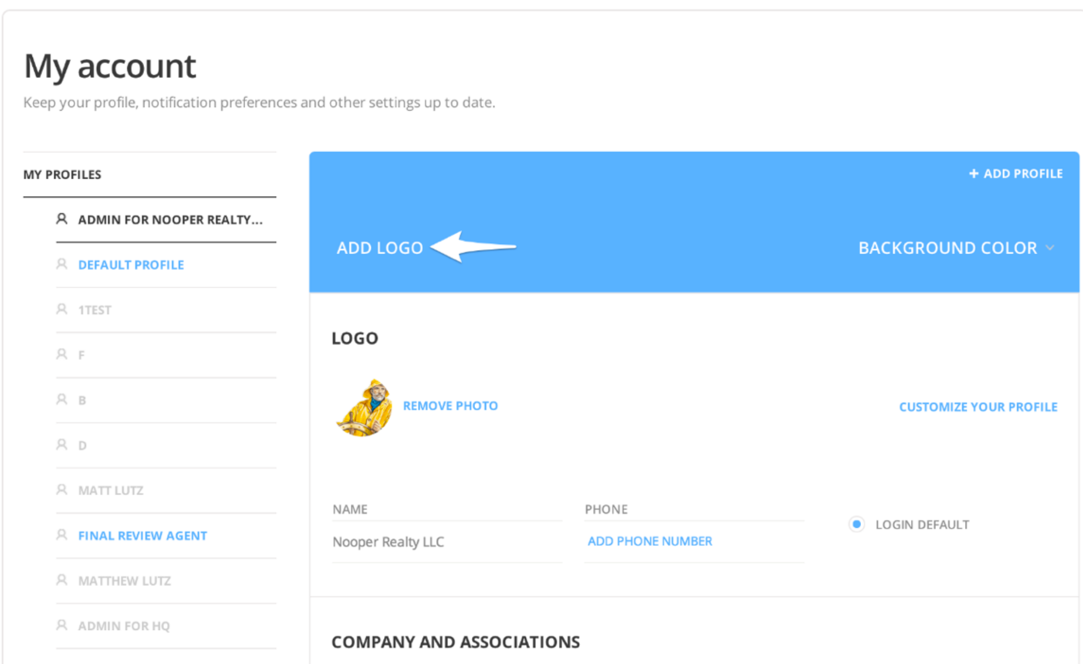
dashboard customization:

branding:

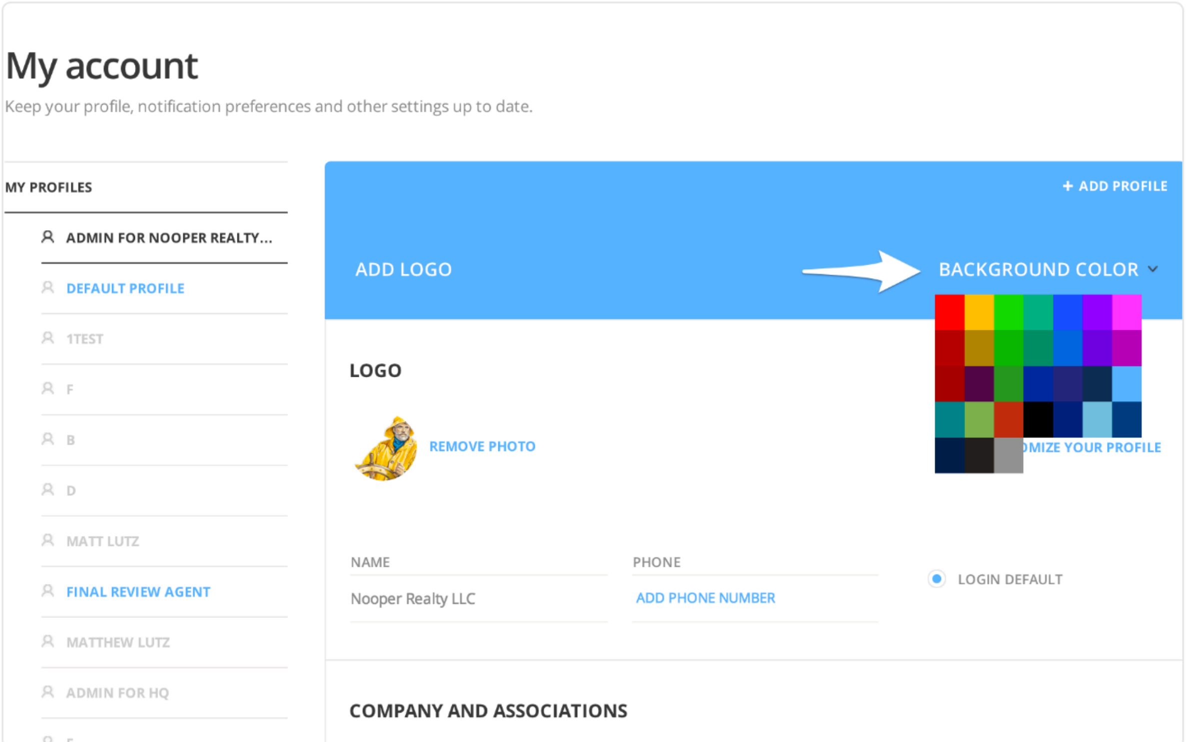
Branding your business + account allows you to change the color of the banner across the top of the page as well as the logo that appears in the top left. To make these changes navigate to your *My Account* page on your admin profile.



By default we are on the *My Profile* page where we can upload a logo for our company by clicking *Add Logo* on the left.



To change your color scheme simply click *Background Color* and grid of available colors will be presented. Make your selection and the changes will be viewable immediately on your account as well as all other members of your business + account.



API:

dotloop's api allows you the ability to push data generated in dotloop into another system. This feature must first be activated by your success manager at dotloop so make sure to reach out to your contact if you wish to integrate this feature into your account.

You can access the api key from the My Account sections on your business + profile, this key can be used by the other system's development team to pull data out of dotloop and put it into their system. Other systems cannot push data into dotloop via our api.

SSO (Single Sign On):

Another great tool to make life on you and your agents much easier is our *Single Sign On* or *SSO.* This feature only available for business+ allows you to create a link from your company's intranet to be able to be directly taken into your dotloop account and already be logged in. *SSO* will allow you to streamline your company's operations and actions. Please talk to your Success Manager for more information.

success planning:

It goes without saying that a strong understanding of how the dashboard works is important to your success. However, individual system knowledge doesn't guarantee success alone. Preparing your office staff and agents does require proper planning and messaging. Don't panic! We've launched thousands of offices just like yours and have identified key steps and considerations for you to follow.

In this section we will list out these steps and summarize them into a general timeline, providing you with solid guidelines to rework for your specific needs.

aligning on goals:

The first step is to clarify your goals with the rest of the office staff. dotloop's dashboard is a stand-alone product. In other words, agents do not have to use esignatures, tasks, collaboration, etc. for you to require completed files to be submitted via dotloop.

So there is one key question with regards to how the office as a whole will use dotloop – **will dotloop be the one place for file submission, review, and storage?** As long as the answer is yes, then you are on your way to 100% adoption!

setting a date:

As soon as you can log in to your dashboard, you can start using dotloop to review, track, and store all office transactions. However, you will want to set realistic expectations with your admins and agents as to when everyone will be onboard. Here are the primary considerations when setting an office-wide 'go live' date.

interactive document templates – If you are planning to upload documents to be made available to your agents as interactive templates and you would like these templates to be available by your 'go live' date, then you will want to upload them to docspot (Templates>Documents) as soon as possible. There is a 3-5 business day window for your documents to be accessible after upload.

training – At a minimum, your agents will need to be trained on the basics in order to understand the new submission process. We offer live online webinars multiple times per week and some options for onsite training through our own Training Department or dotCertified Consultants (options will very based on size and location of offices). Following agent training, we recommend a 2-4 week grace period for agents to grasp the new submission process while they transition.

other technologies – If you plan on discontinuing a current service that will be replaced by dotloop, you will want message this clearly to the agents, and include some time for transition. If current technologies will still be available, remind the agents that dotloop is still the final submission portal, regardless of where they fill out, sign, or store documents personally.

organizing your office:

You understand the value of dotloop and have established your goals and timeline, now it's time to assemble the key players. All admins and broker/managers involved in reviewing transactions will need to understand their part on dotloop so that you are ready for agent file submissions. The best way to ensure that the office staff is ready is to schedule group training and practice sessions. Create fake listing and buying folders, submit them for review, and move them through the online review process.

You may also consider bringing a few key agents into these early practice sessions. They will have a different perspective and will be able to ask key questions about how you will notify them, what the expectations are, etc. Document these questions and answers so that you can include them into your messaging to the rest of the agents.

messaging:

Your 'go live' date, training options, and other specifics that were documented while practicing with your office should be messaged clearly and often. While messaging your agents, don't forget to include the 'why'. It's important that the agents and your staff understand the end goal and overall value of having everyone on dotloop. Messaging can be easily overlooked and you may not know where to start, which is why we have email templates for you to use if you need a little help.

sample plan:

Now that we've laid out the key planning considerations, let's put them all together and back ourselves into a 'go live' date. In this example, Mary is one of two admins at ABC Realty. Mary's broker (Bob) wants flexibility and recognizes that agents do too. Bob has signed up for dotloop so that he can review files from anywhere and he also likes the time saving benefits that it provides his agents. He plans on using dotloop as a new recruiting tool to attract progressive, top-producing agents and he trusts Mary to take the lead on transitional matters. So far, Mary has reviewed this manual and came up with the following 4-week plan:

week 1:

- Meet with John (second admin) to establish who will be in charge of uploading documents

into docspot and ensure documents are uploaded by the end of the week. Also decide who will be creating any document sets and task templates.
- Attend the online Admin training webinars with John, create a few practice loops together, and run both buying and listing folder types through the online review process, documenting questions along the way. Reach out to Success Manager with any questions!
- Send an email to all agents notifying them that we will be using dotloop as our one place to submit transactions for review, starting 4 weeks from today on mm/dd/yyyy. The email will provide links to upcoming training webinars and will serve to excite the agents, letting them know that further messaging and instructions are on the way.
- Invite 2-3 tech-friendly agents to a training meeting in week 2 in order to show them how to submit for review and to see what questions they may have about the new processes.

week 2:
- Ensure that task templates (admin checklists) have been created.
- Meet with the 2-3 selected agents, teach them how to submit for review, and have them run a few folders through the online review process. Make sure they are helping to get the rest of the office excited about dotloop. Document questions and best practices along the way and reach out to your Success Manager with any questions.
- Send an email early in the week to all of the agents notifying them that office training will be held on mm/dd/yyyy (one week from the date of the email) to show them how to submit files for review and to let them know about all of the agent features that are also available.

week 3:
- Ensure that all documents are available. Create a listing and sale folders (document sets) and Loop Templates for the agents by the end of the week, as well as any Task Templates they might need.
- Ask the agents that we trained earlier how they are coming along and refine/document any processes as necessary.
- Send reminder email to agents about training and attach specific instructions about the basics of our online submission requirements and any specifics that we have documented along the way.
- Hold the scheduled training for all agents.

week 4:
- Post helpful documents above the office scanner and on community boards reminding agents that they can scan documents directly into their dotloop accounts. Also remind them that they can split the PDFs after they add them to a loop.
- Send an email reminding agents where they can find additional training videos and provide dotloop’s support number again. Also remind agents of the ‘why’ (value of dotloop) and remind them of the ‘go live’ date (end of the week).
- Continue sending ongoing emails to clarify common questions, share new dotloop feature

releases, and share agent success stories.

Always remember, your Success Manager is here to help with any customization, review processes and general admin questions!

Don't forget to visit support.dotloop.com for instructional videos, additional content and further training resources!

Happy Looping!