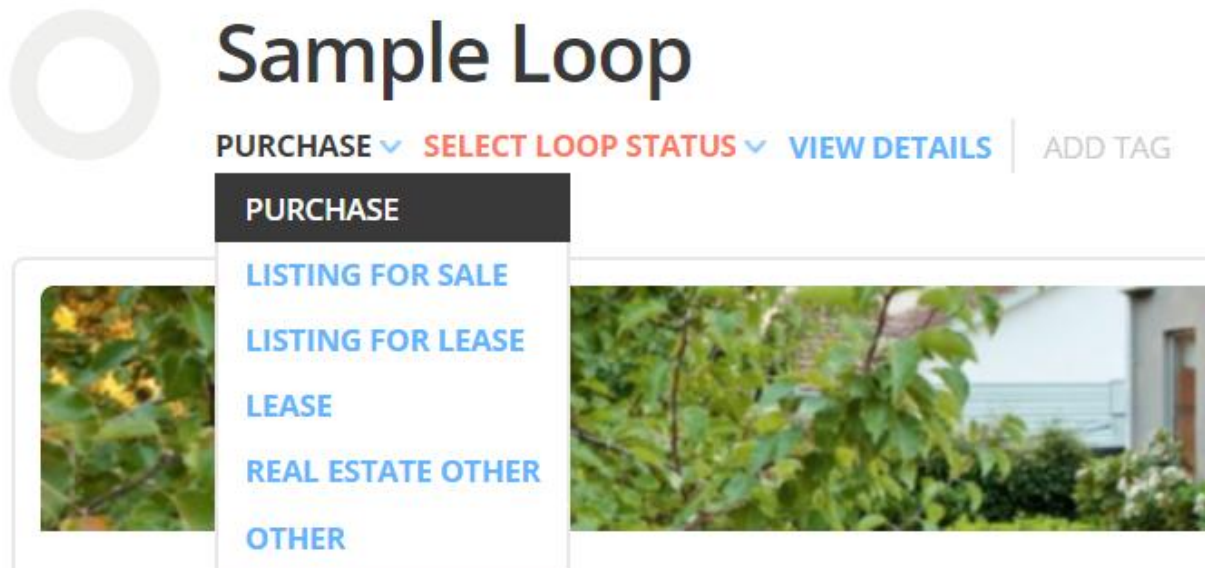


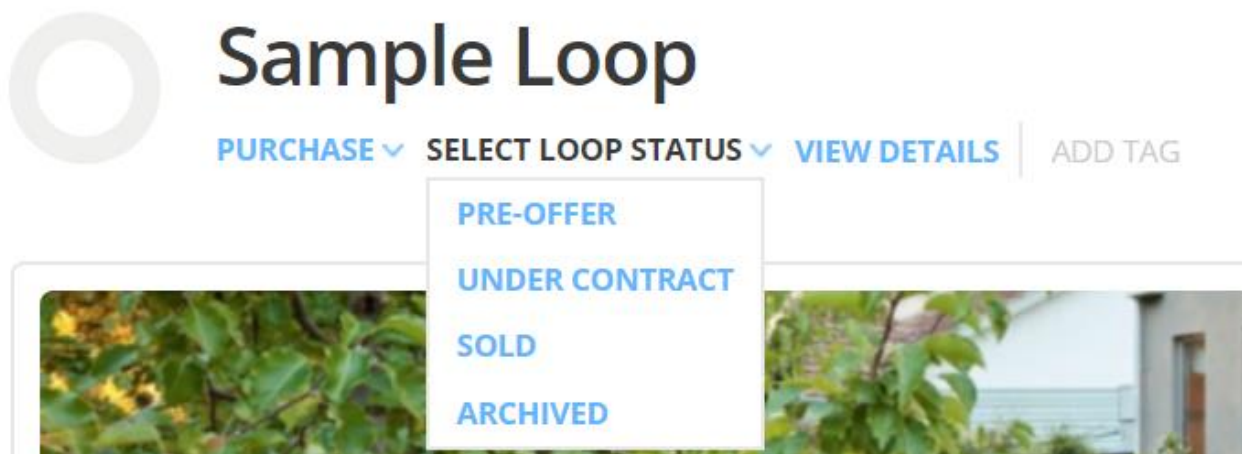
Loop Life & Paperless Process Workflow

Creating A Loop

1. Click on the +, or “+Create a Loop” pending which view you are in (Grid vs List)
2. Name the loop with the address of the subject property
3. Select the proper type of Transaction Template that applies to your loop
4. Using the Crumb Trail under the title of the loop, classify your loop



Throughout the life of the loop, you will need to keep this area updated for Dashboard and reporting purposes, specifically the “Loop Status”.



Next, Click on “VIEW DETAILS”, and fill out as much information as you can. This area will also be updated multiple times throughout the life your “Loop”/Transaction.



NOTE: If done correctly, this area is called the “Engine of the Loop”. Filling out this area will populate certain field throughout all documents for you, saving time and reducing mistakes throughout your contracts. THIS SHOULD BE THE VERY FIRST THING YOU DO BEFORE STARTING YOUR CONTRACTS!

The screenshot displays the 'Engine of the Loop' configuration page. At the top, there is a header image of a house. Below it, a form is divided into three sections: 'TRANSACTION TYPE' with a dropdown menu set to 'PURCHASE' (marked with a red '1'), 'LOOP STATUS' with a dropdown menu set to 'SELECT LOOP STATUS', and 'LOOP NAME' with radio buttons for 'USE PROPERTY ADDRESS' and 'USE CUSTOM NAME: Sample Loop'. Below this is the 'AUTOFILL SETTINGS' section, which includes a dropdown for 'CONTRACT DATA SHOULD AUTO FILL TO AND FROM'. The main section is 'PEOPLE', which lists several individuals with their names, email addresses, and roles. A red box highlights the 'ADD PERSON' button (marked with a red '2'). Another red box highlights the 'LISTING AGENT' dropdown menu for the 'Cindy Co-op' entry, which is set to 'ADMIN' (marked with a red '3'). A 'NOTE' is present at the bottom right of the screenshot, stating: 'NOTE: Your office admin is already added to your loops. There is NO NEED TO ADD YOUR OFFICE ADMIN! Doing so can affect the overall process.'

- 1- You can make corrections and rename the loop at the very top of the view details page
- 2- This is where you add all individuals that are involved in the loop/transaction
- 3- Select the proper “Role” for the person you added, this helps place assign that person to certain fields within the documents.



PROPERTY ADDRESS

PROPERTY

1

We'll suggest addresses or listings that match.

USA	261 5	Hudson Ave
UNIT NUMBER	CITY	STATE/PROV
ADD UNIT NUMBER	Pasadena 2	CA
ZIP/POSTAL CODE	COUNTY	MLS NUMBER
91101	ADD COUNTY	ADD MLS NUMBER
PARCEL/TAX ID		
ADD PARCEL/TAX ID		

1-You can search for the address in the top field. For example, type “7009 Beach Dr, Panama City” and DotLoop will search Google Maps for that address and present options to pick from. Selecting one of these addresses will fill out the fields for you in section 2.

2-Ensure that the address that is use is correct and everything matches up to your subject property.

FINANCIALS

PURCHASE/SALE PRICE	SALE COMMISSION RATE	SALE COMMISSION SPLIT % - BUY SIDE
550,000	ADD SALE COMMISSION RATE	ADD SALE COMMISSION SPLIT % - BUY SIDE
SALE COMMISSION SPLIT % - SELL SIDE	SALE COMMISSION TOTAL	EARNEST MONEY AMOUNT
ADD SALE COMMISSION SPLIT % - SELL SIDE	ADD SALE COMMISSION TOTAL	ADD EARNEST MONEY AMOUNT
EARNEST MONEY HELD BY	SALE COMMISSION SPLIT \$ - BUY SIDE	SALE COMMISSION SPLIT \$ - SELL SIDE
ADD EARNEST MONEY HELD BY	ADD SALE COMMISSION SPLIT \$ - BUY SIDE	ADD SALE COMMISSION SPLIT \$ - SELL SIDE

The FINANCIALS area needs to be filled out properly to help ensure proper dispersal of funds after the transaction is complete.



CONTRACT DATES

CONTRACT AGREEMENT DATE

[ADD CONTRACT AGREEMENT DATE](#)

CLOSING DATE

[ADD CLOSING DATE](#)

OFFER DATES

INSPECTION DATE

[ADD INSPECTION DATE](#)

OFFER DATE

[ADD OFFER DATE](#)

OFFER EXPIRATION DATE

[ADD OFFER EXPIRATION DATE](#)

OCCUPANCY DATE

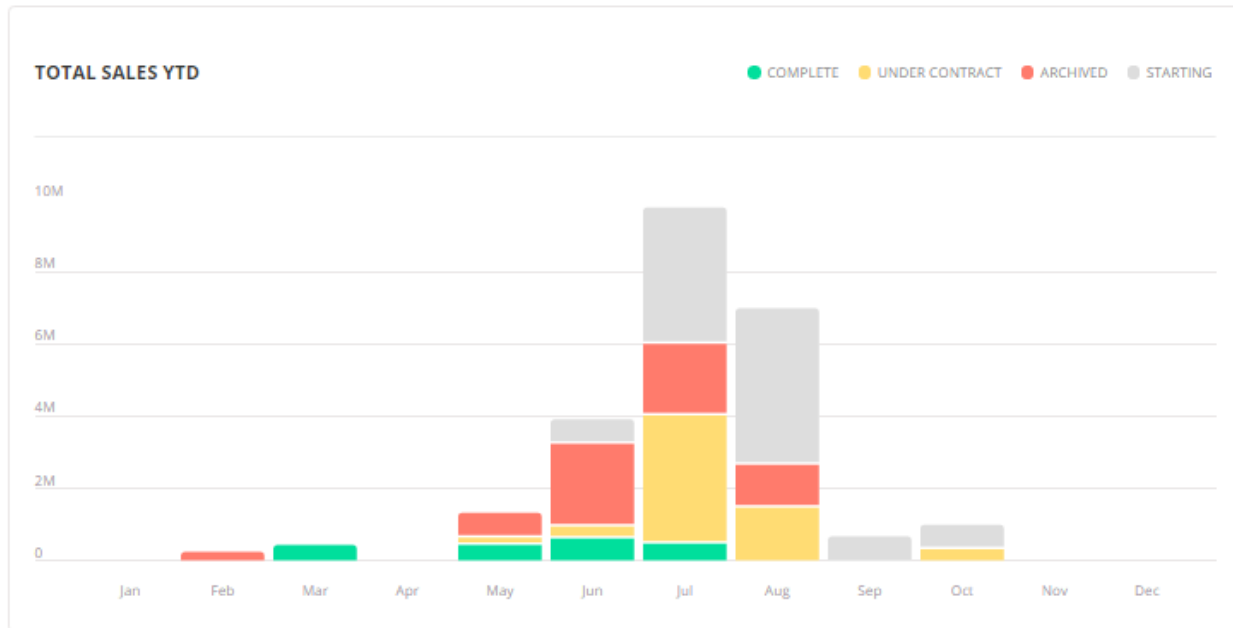
[ADD OCCUPANCY DATE](#)


Filling out the CONTRACT DATES & OFFER DATES sections helps in the following areas:

- 1- Fills out certain areas within certain documents that the information applies to.
- 2- Builds your “Business Dashboard” and helps you plan and track your performance when viewing the “Dashboard”.

Dashboard

Know your business, grow your business.



*Accessed by clicking on the  located as the first option in the menu bar in the upper right hand corner next to your profile icon.



CONTRACT INFO

TRANSACTION NUMBER	CLASS	TYPE
ADD TRANSACTION NUMBER	ADD CLASS	ADD TYPE

This portion will be filled out by your office admin.

Office Admin: Use Lucero number in this field.

Further fields may change as we adapt this area to become the new pending sheet in the near future!

Visit The DOTLOOP Section of your Agent Office for Further Training and WalkTrough Videos!

