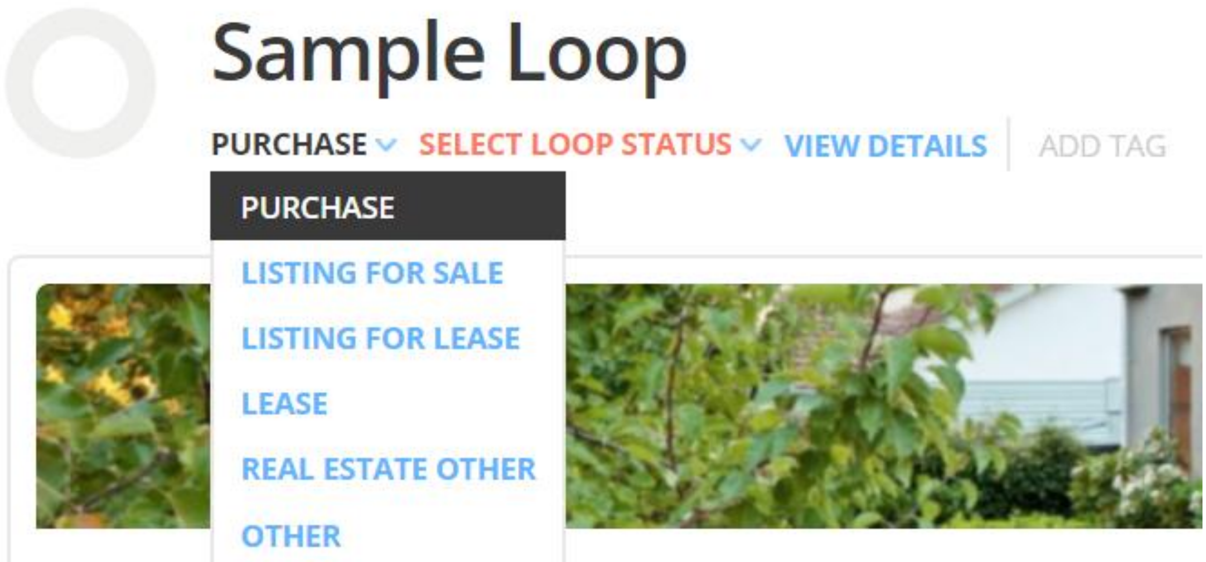
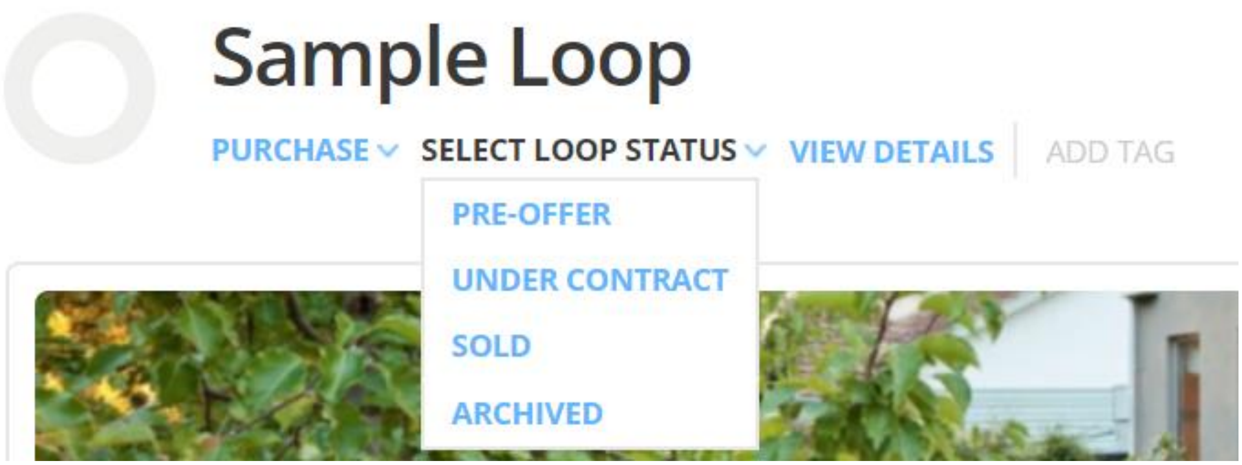
Loop Life & Paperless Process Workflow

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

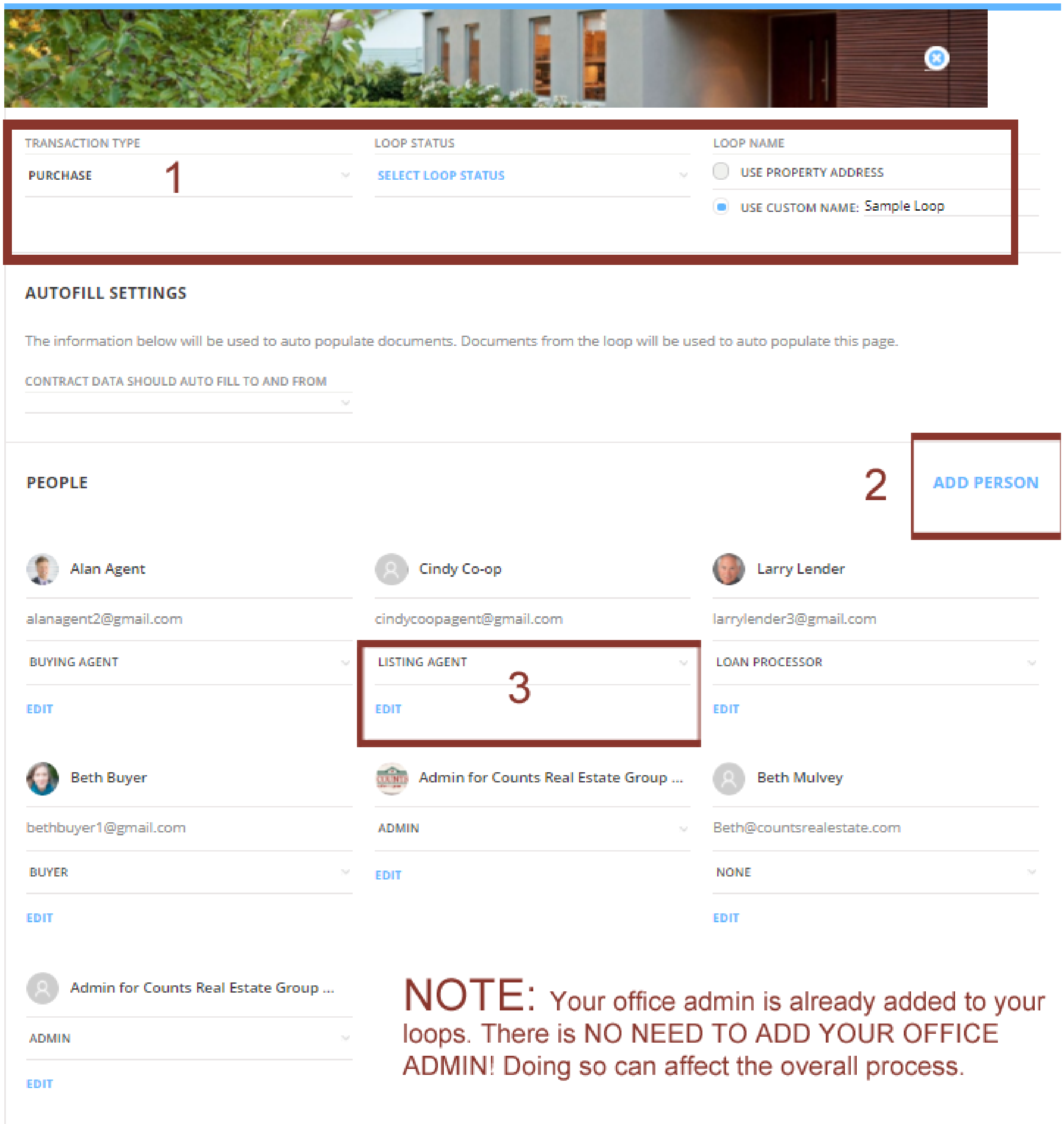


Throughout the life of the loop, you will need to keep this area updated for Dashboard and reporting purposes, specifically the "Loop Status".

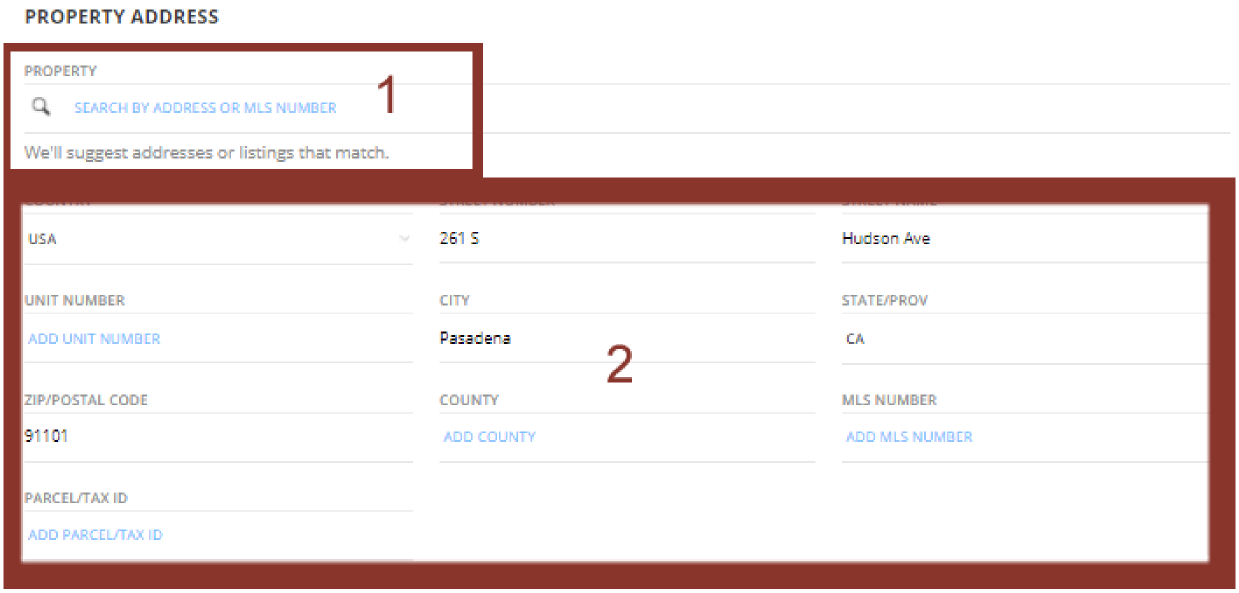


Next, Click on "VIEW DETAILS", and fill out as much information as you can. This area will also be updated multiple times throughout the life your "Loop"/Transaction.

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!**

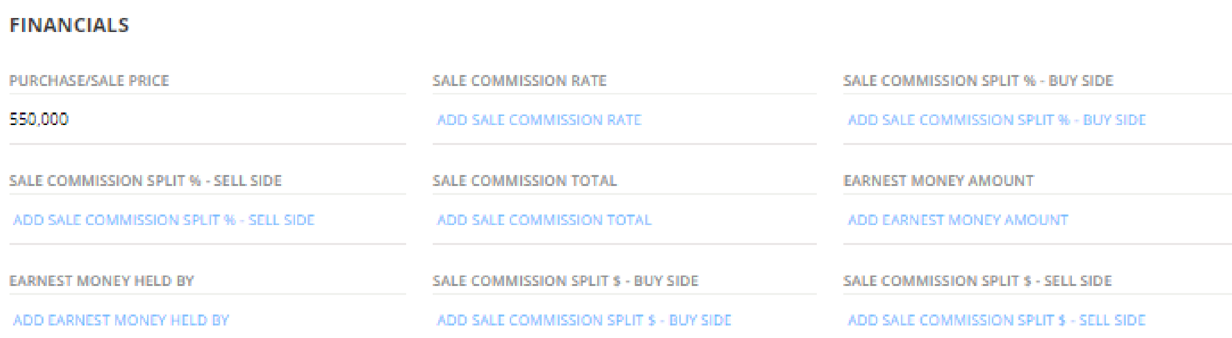


1- **You can make corrections and rename the loop at the very top of the view details page**
2- **This is where you add all individuals that are involved in the loop/transaction**
3- **Select the proper "Role" for the person you added, this helps place assign that person to certain fields within the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



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.



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	CLOSING DATE
ADD CONTRACT AGREEMENT DATE	ADD CLOSING DATE

OFFER DATES

INSPECTION DATE	OFFER DATE	OFFER EXPIRATION DATE
ADD INSPECTION DATE	ADD OFFER DATE	ADD OFFER EXPIRATION DATE

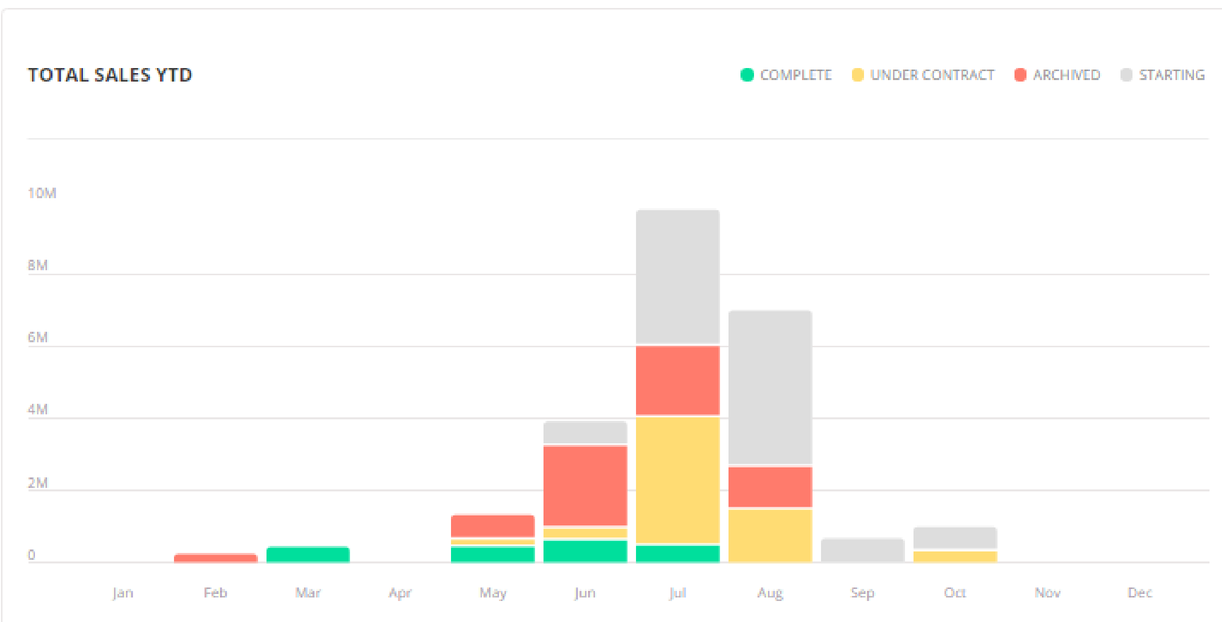
OCCUPANCY DATE
ADD OCCUPANCY DATE

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

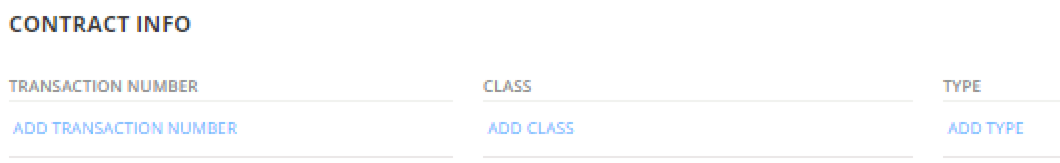
1- **Fills out certain areas within certain documents that the information applies to.**
2- **Builds your "Business Dashboard" and helps you plan and track your performance when viewing the "Dashboard".**

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.**



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!