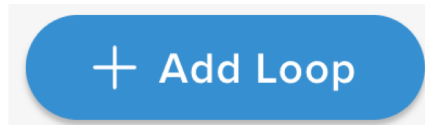


# creating a loop

Click on + Add Loop to begin creating a loop



Name your loop

- If it's a listing name it the property address
- If you're representing buyers you can name the loop their name and rename it the address later so that all of your loops have the same naming convention

Select a loop template

- Your office has created loop templates to make you more efficient, make sure you apply one when you're creating a loop

Now let's add some documents!

# template auto-population

1. In your loop's document section, click 'Add From' and choose 'Templates'
2. Open the templates and add people/assign their role in the autofill window
3. Fill-in the other sections of the autofill window and click 'Autofill'
4. Review/complete your documents and assign or unassign esignatures as needed
5. Click 'Save' or 'Save and Share' in the upper right hand corner

# editing PDFs

1. In your loop's document section, click 'Add From' and choose 'Computer'
2. Open your PDF/s in Dotloop and click 'Add' at the top of the page
3. Choose either signature, initial, text, etc. and click to place it onto the PDF
4. Click in a signature or initial field and go up to the top left of your screen to assign it to the correct client/person

# sharing documents

View Only -> Can view document

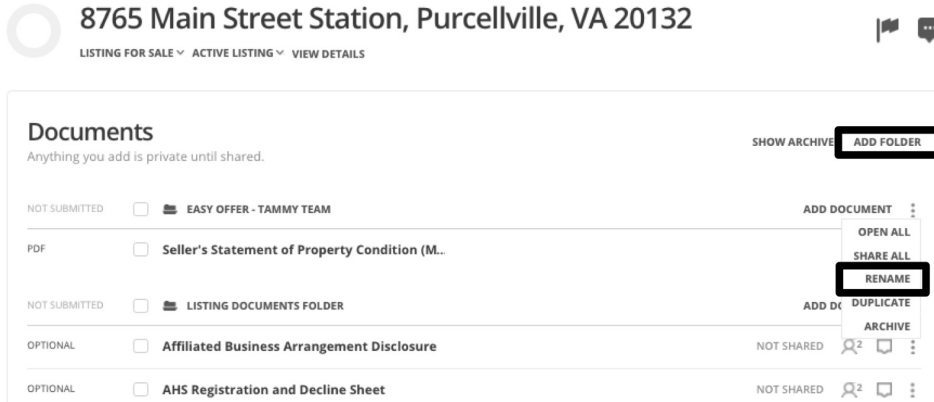
Can Sign -> Can view document and sign/complete assigned fields only (clients)

Can Fill & Sign -> Can view, sign, and fill out a document (clients)

Can Edit In Private -> Can view, sign, fill out, and assign remaining signature fields

Visit [support.dotloop.com](https://support.dotloop.com) for more training and videos.

# adding and renaming folders



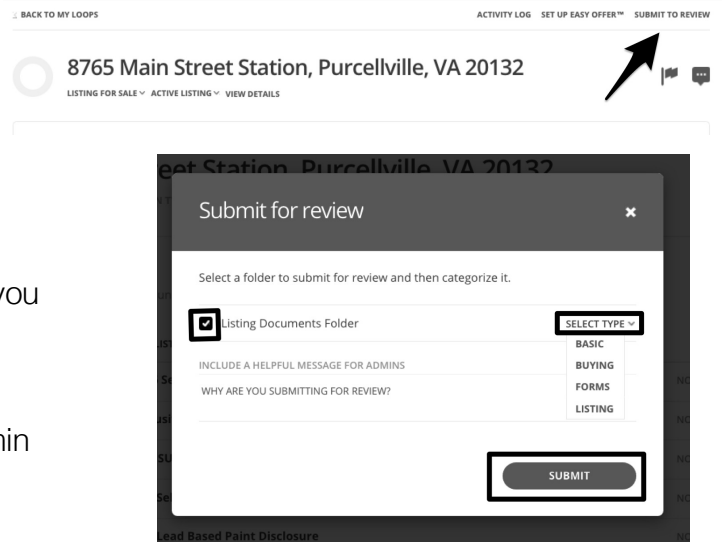
1. In the top right of your documents section you will have the ability to 'Add Folder'
2. Once a folder is in the loop, click on the 3 vertical dots to the right of the folder and choose 'Rename'
3. Folder name will become editable. Rename and hit 'Enter' on your keyboard/tablet

\* Folders can help you eliminate creating multiple loops. Have one loop for your buyers and create a new folder for every offer you submit. Working a listing? Have a folder of listing documents and create a folder for each offer you receive.

# submit to review

Since you can't share documents to your broker or admin you need to 'Submit to Review'. This sends a notification compliance to have your loop reviewed.

1. In the top right of your loop click 'Submit to Review'
2. If your loop contains multiple folders, select the ones you would like to submit by checking the box to the left
3. 'Select Type' to indicate whether the folder contains buying or selling information
4. If necessary, you may supply more detail for your admin with a custom message.



# editing a person

1. Towards the bottom of your loop you will find your 'People' section. You can add, remove, and edit your contacts here
2. To edit, you can click on the name of the person and that will open a edit window or you can click the 3 vertical dots to the right of the contact and choose 'Edit'
3. Update the information and save

\*Only add someone to your team if they are working with you on the same side of the transaction



With dotloop for mobile, access your transactions on any device, anytime, anywhere. Download the app today!

