My Account (helps with auto-filling documents)

1. Navigate to your initials in the top right of your screen
2. Click on 'My Account' and complete all the details under 'Account Settings' and 'Profiles'
• By filling out this information, dotloop will be able to help you save time filling out documents

Using Statuses and Filters (keep your home page tidy)

Too keep your loops organized you will want to establish the loop's type and status. Then you can apply filters to your home page.

1. On your loops home page you will see 'Type' on each loop. Click on 'None' to establish loop type
2. Once your loop has a type you can set that status

Setting filters on your home page will only allow you to see loops that have the status you checked off. We recommend checking off all statuses except for sold, leased and archived

Adding Documents Via Email (great for on the go)

1. Within a loop click on 'Add Documents' then choose 'Email'.
2. Click 'Copy to Clipboard'
3. Navigate to the email you received and make sure the attachment is a PDF.
4. Forward the email and instead of typing out an email address to forward it to you will paste the email address that was copied to the clipboard. Click send.
5. Go back to your loop and refresh the page, the attached documents are now in your loop!

Renaming an Open Document

To rename an open document click on the name of the document in the top left. It will become editable. Once the new name is typed out just hit enter on your keyboard to save the change.

Hot Keys (place initials quickly by copying and pasting)

1. Open up the document that you need to add fields to
2. Toward the top right click on 'Add' then 'Add Initials' (or signature, text, anything!)
3. Assign the initials to the correct person, resize if necessary
4. Now we need to select the field(s). If it's just one field you will just click on that field. If you have multiple fields then hold down the shift key while clicking on the fields
5. To copy use COMMAND+SHIFT+C (Mac) or CTRL+SHIFT+C (PC)
6. Navigate to the next page or place you need the initials and use COMMAND+SHIFT+V (Mac) or CTRL+SHIFT+V (PC). The field(s) will be following your mouse around until you click and place them

Visit www.support.dotloop.com for even more!

Splitting Documents (less time at the scanner)

1. Open the document and click on 'File'
2. Choose 'Split Document' (notice that you can also rotate documents/pages)
3. That will open a smaller window where you will determine the number of documents to split into, the page numbers and document names.

After you click 'Split Document' you will be left with the individual documents and the original will be archived.

Merging Documents

1. Open the loop and navigate to the documents
2. Drag and drop the documents into the correct order
3. Check the boxes to the left of the document
4. Toward the top right of the documents click on 'Download'
5. This will download all selected documents to your computer as one that you upload into the loop

Document History (did the agent view my offer?)

1. Open the document and click on 'More' and choose 'Document History'
2. This will open a smaller window that gives a complete audit trail of the document. Date and time stamping anytime the document has been viewed, shared, signed, modified or exported.

Host in Person Signing (instead of email)

1. Open the document and click on 'More' and choose 'Host in Person Signing'
2. Choose who you want to sign the document(s)
3. Hand the device over to the client. They will now sign the document
4. Once signed you will need to sign back into your account to view the document

Best practice is to open multiple documents (if necessary) and then begin the Host in Person Signing process. You client will received a signed version of the document via email.

Make a Copy

1. Open the loop, scroll down to your documents, choose the document you need to copy and click the three dots to the right. Click on 'Make a Copy'
2. Choose 'Copy as Flat PDF' then 'To Loop'
3. Don't forget to use the search bar to find the loop you would like to copy the document into. Once you find the loop you can decide which folder needs to have the copy

Making a copy allows you to copy documents between loops and folders. By copying as a flat PDF you can make changes to a signed document without clearing all signatures and initials.