

Dotloop Training | **BEGINNER OUTLINE/RESOURCES**

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SUPPORT

For product help, please visit our support website or contact our support department:

- Website: support.dotloop.com
- Chat with an expert on our support site
- Email: support@dotloop.com
- Phone: 888-Dotloop

TRAINING OPTIONS

Email training@dotloop.com if you have questions about our additional training options:

- Dotloop Certified Looper Program [CLICK HERE](#)
- Online Continuing Education - [CLICK HERE](#)
- Custom webinar consultations
- Onsite training

LOGIN

Outline

- Signing up through your office's invite email vs. signing up as an individual agent
- Logging in at dotloop.com
- How to retrieve passwords

Resources

Accepting an invite to join a Business+ or Teams account [CLICK HERE \(video\)](#)

Account setup [CLICK HERE \(support article\)](#)

Recovering agent or client passwords [CLICK HERE \(support article\)](#)



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NAVIGATION

Outline

- Global Navigation Bar
- Inside of an existing loop

Resources

General Navigation [CLICK HERE \(video\)](#)

Trusted Service Providers [CLICK HERE \(video\)](#)

LOOP CREATION (MAKING AN OFFER)

Outline

- Creating a loop with a loop template vs. creating a loop without a loop template
- Adding/removing documents, people, and task lists

Resources

Creating a loop [CLICK HERE \(video\)](#)

Add/remove/edit people [CLICK HERE \(video\)](#)

DOCUMENTS

Outline

- Auto-filling/editing document templates
- Editing uploaded PDFs

Resources

Adding/auto-filling document templates [CLICK HERE \(video\)](#)

Adding/editing PDFs, splitting PDFs, rotating PDFs [CLICK HERE \(video\)](#)



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SHARING DOCUMENTS

Outline

- Sharing permissions
- Client Esigning Experience
- Submit for Review (submitting files to your office staff/broker for review)

Resources

Sharing documents and document sharing permissions [CLICK HERE \(video\)](#)

The client signing experience [CLICK HERE \(video\)](#)

Client signing as a company or power of attorney [CLICK HERE \(video\)](#)

Submit for Review [CLICK HERE \(video\)](#)

Esignature verification certificate [CLICK HERE \(video\)](#)

MANAGING LISTINGS

Outline

- Using multiple folders to keep offers organized
- Merging loops

Resources

Create a listing loop [CLICK HERE \(video\)](#)

Merging Loops [CLICK HERE \(video\)](#)

Easy Offer [CLICK HERE \(video\)](#)

Managing Homepage

Resources

Filtering loops on your homepage [CLICK HERE \(video\)](#)



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NEXT STEPS

- Register for our Advanced training webinar [CLICK HERE](#)
- Consider our online CE course. For state availability [CLICK HERE](#)
- Consider our Certified Looper Program [CLICK HERE](#)
- On a Team? Ask us about dotloop for Teams: training@dotloop.com

