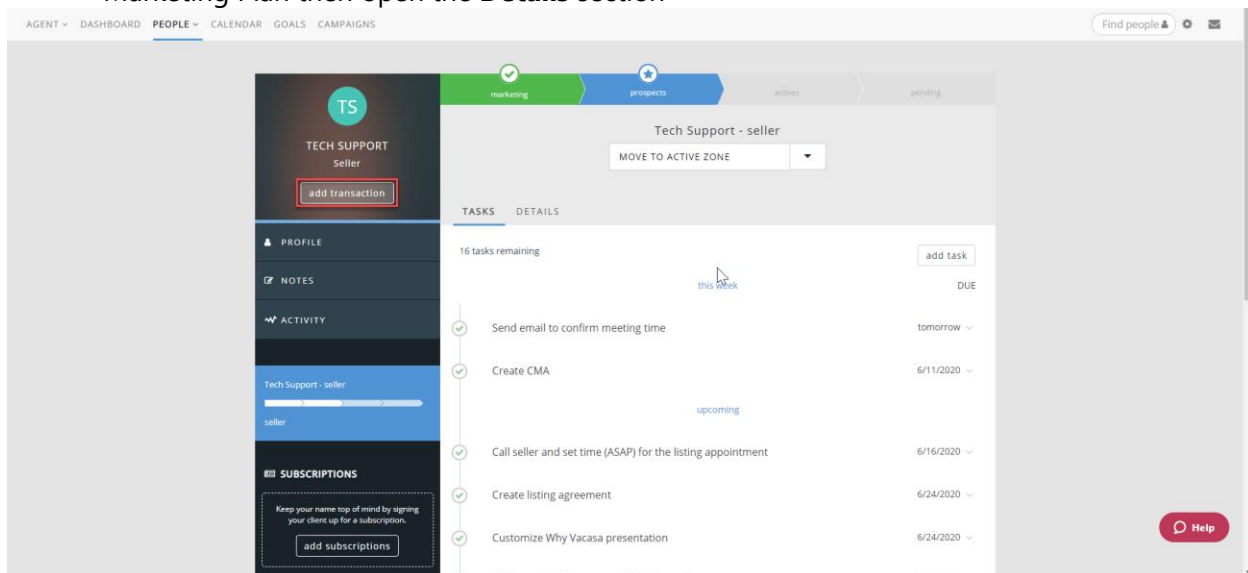


How Dotloop works in the Sales Flow

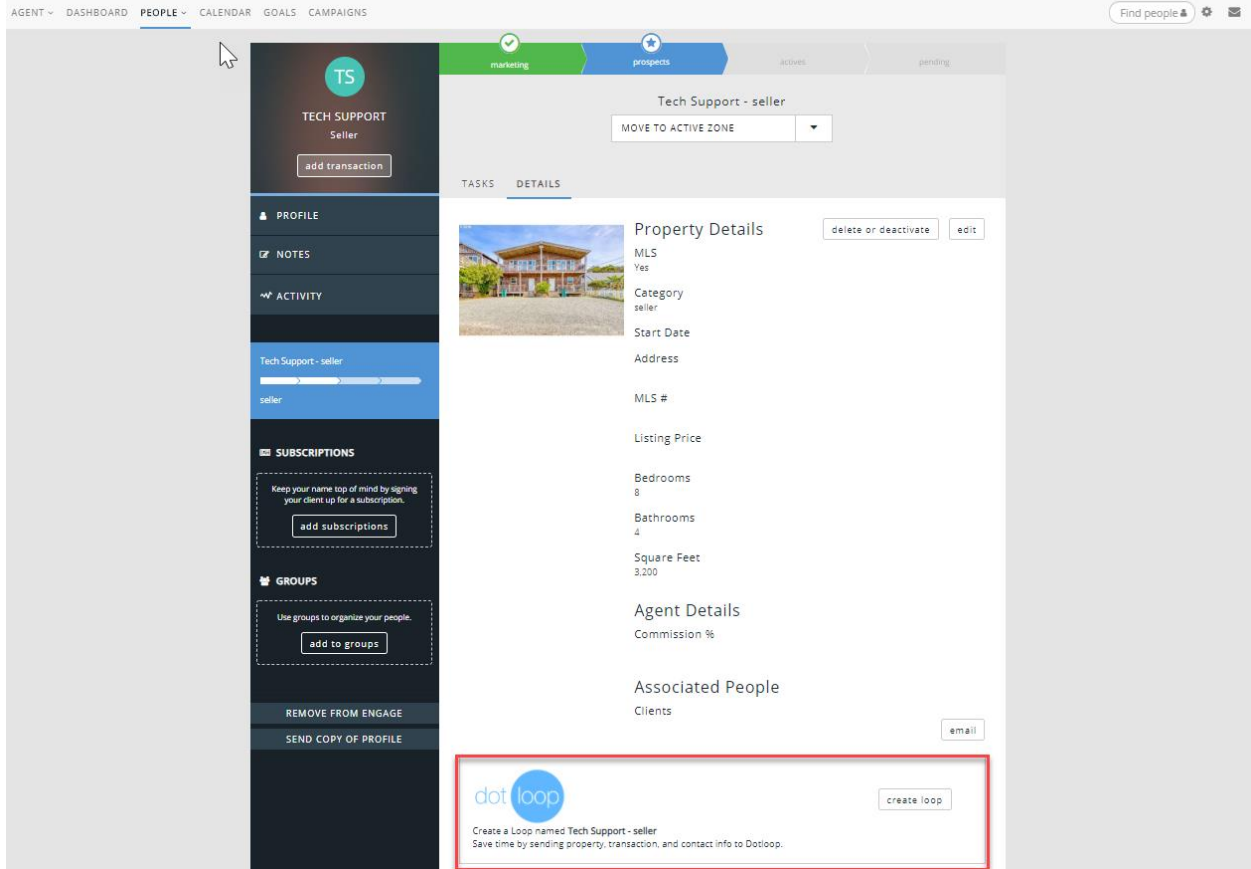
Dotloop is a partner of Moxi, directly integrated into our program so you can create a Loop from your Engage sales flow task list.

To create a Dotloop loop, follow the steps below:

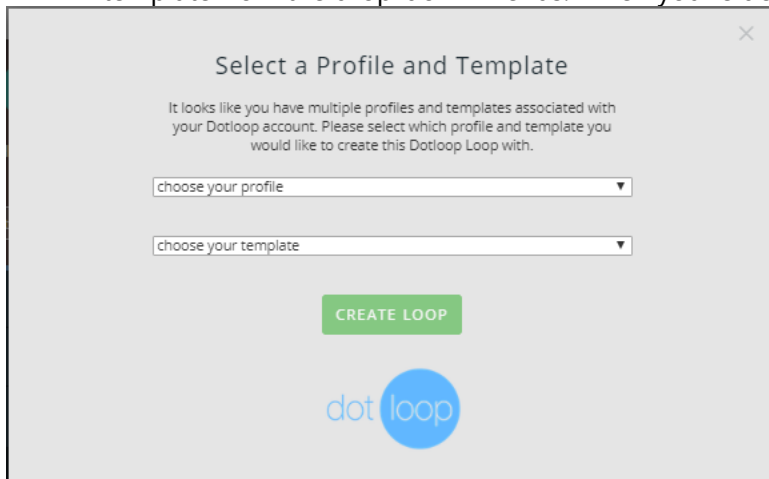
1. Select the person you would like to create a Loop with.
2. Select **Add Transaction**. *If you already have a transaction created with your client, go to the Marketing Plan then open the **Details** section



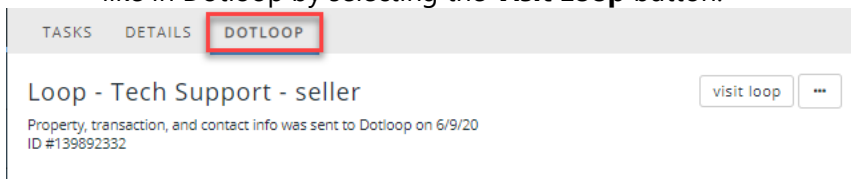
3. Input your listing details or MLS # for the property then scroll down to see '**Create a Loop**' section at the bottom. *If you went directly to the Details section of your sale to create your Loop, this can be located below the Property Details as well. Select the Create Loop button.



4. A pop-up dialog box should appear on your screen for you to choose your profile and template from the drop-down menus. When you're done, select **Create Loop**.



5. Now, you should see Dotloop as a tab on your contact's sales flow. You can see what it looks like in Dotloop by selecting the **Visit Loop** button.



For select brokerages, you can create a Dotloop Loop and add documents to your Loop from the Sales Flow.

Buyer Transactions

If you are creating a transaction where you are representing the buyer, you should be on the Buyer Plan. You can find your Dotloop integrated tasks when your Buyer is in the Prospects phase.

The screenshot shows a CRM interface with a sidebar on the left and a main content area. The sidebar includes sections for 'PROFILE', 'NOTES', 'ACTIVITY', 'SUBSCRIPTIONS', and 'GROUPS'. The main content area displays a task list for 'Tech Support - buyer'. The task list includes the following items:

Task	Due Date
Schedule Meet-and-Greet	6/15/2020
Questions Buyers Should Ask	6/16/2020
Create RealScout home search	6/16/2020
Buyer Letter 1: I'm Looking Forward to Working with You.	6/17/2020
Conduct Meet-and-Greet	6/23/2020
Buyer Letter 2: Pleasure to Meet with You	6/25/2020
Mail Thank You Note	6/30/2020
Create Dotloop Loop	7/4/2020
Complete Buyer's Agreement Documents	7/5/2020
Submit Buyer Agreement Docs to DotLoop	7/9/2020

The task 'Create Dotloop Loop' is highlighted with a red box. A small drop-down arrow is visible next to the date '7/4/2020'.

1. Select the small drop-down arrow next to the task date to expand this item. Select **Create Loop** to send the listing's information to Dotloop.

TASKS DETAILS

11 tasks remaining add task

upcoming DUE

- ✓ Schedule Meet-and-Greet 6/15/2020 ▾
- ✓ Questions Buyers Should Ask 6/16/2020 ▾
- ✓ Create RealScout home search 6/16/2020 ▾
- ✓ Buyer Letter 1: I'm Looking Forward to Working with You. 6/17/2020 ▾
- ✓ Conduct Meet-and-Greet 6/23/2020 ▾
- ✓ Buyer Letter 2: Pleasure to Meet with You 6/25/2020 ▾
- ✓ Mail Thank You Note 6/30/2020 ▾
- ✓ Create Dotloop Loop 7/4/2020 ▲

Save time by sending property, transaction, and contact info to Dotloop.

CREATE LOOP
←

done edit more

2. Next, you can submit your Buyer Agreement Documents to your Loop by selecting the drop-down arrow for the next Dotloop task (see below).

AGENT ▾ DASHBOARD PEOPLE ▾ CALENDAR GOALS CAMPAIGNS Find people

TS

TECH SUPPORT
Buyer

add transaction

PROFILE

NOTES

ACTIVITY

Tech Support - buyer

buyer

SUBSCRIPTIONS

Keep your name top of mind by signing your client up for a subscription.

add subscriptions

GROUPS

Use groups to organize your people.

add to groups

REMOVE FROM ENGAGE

Tech Support - buyer

MOVE TO ACTIVE ZONE ▾

TASKS DETAILS

11 tasks remaining add task

upcoming DUE

- ✓ Schedule Meet-and-Greet 6/15/2020 ▾
- ✓ Questions Buyers Should Ask 6/16/2020 ▾
- ✓ Create RealScout home search 6/16/2020 ▾
- ✓ Buyer Letter 1: I'm Looking Forward to Working with You. 6/17/2020 ▾
- ✓ Conduct Meet-and-Greet 6/23/2020 ▾
- ✓ Buyer Letter 2: Pleasure to Meet with You 6/25/2020 ▾
- ✓ Mail Thank You Note 6/30/2020 ▾
- ✓ Create Dotloop Loop 7/4/2020 ▾

Complete Buyer's Agreement Documents 7/5/2020 ▾

Submit Buyer Agreement Docs to DotLoop 7/9/2020 ▾

3. Select on the green Dotloop button to redirect to your Dotloop account and you can submit your documents there.

The screenshot shows a task management interface with a list of tasks. The task 'Submit Buyer Agreement Docs to DotLoop' is highlighted with a red box. A red arrow points to the 'DOTLOOP' button within this task's details. Another red arrow points to the due date '7/9/2020' of the same task.

	upcoming	DUE
✓ Schedule Meet-and-Greet		6/15/2020
✓ Questions Buyers Should Ask		6/16/2020
✓ Create RealScout home search		6/16/2020
✓ Buyer Letter 1: I'm Looking Forward to Working with You.		6/17/2020
✓ Conduct Meet-and-Greet		6/23/2020
✓ Buyer Letter 2: Pleasure to Meet with You		6/25/2020
✓ Mail Thank You Note		6/30/2020
✓ Create Dotloop Loop		7/4/2020
✓ Complete Buyer's Agreement Documents		7/5/2020
✓ Submit Buyer Agreement Docs to DotLoop		7/9/2020

Receive and Submit the signed Buyer's Agreement to Compliance.

DOTLOOP done edit more

Seller Transactions

If you are creating a transaction where you are representing the seller, you should be on the Seller Plan. You can find your Dotloop integrated tasks when your seller is in the Active phase.

The screenshot shows a CRM interface with a navigation bar at the top containing 'AGENT', 'DASHBOARD', 'PEOPLE', 'CALENDAR', 'GOALS', and 'CAMPAIGNS'. On the right, there is a search bar labeled 'Find people' and a notification icon. The main content area is divided into a left sidebar and a right main panel. The sidebar includes sections for 'TECH SUPPORT Buyer & Seller' with an 'add transaction' button, 'PROFILE', 'NOTES', 'ACTIVITY', 'Tech Support - seller' (with a progress bar), 'Tech Support - buyer' (with a progress bar), 'SUBSCRIPTIONS' (with an 'add subscriptions' button), and 'GROUPS' (with a 'Use groups to organize your people.' button). The main panel shows a 'Tech Support - seller' header with a 'MOVE TO PENDING ZONE' dropdown. Below this is a 'TASKS' tab and a 'DETAILS' section. The 'TASKS' section displays '35 tasks remaining' and an 'add task' button. A list of tasks follows, with columns for 'upcoming' and 'DUE'. The first task, 'Submit Listing Paperwork to Dotloop for Review', is highlighted with a red box. Other tasks include 'Send Gift, Optional', 'Seller Letter 4: Thank you for hiring us', 'Create Property Prep-List', 'Complete Recommended Seller Docs in Dotloop', 'OrderTitle V (septic inspection)', 'Obtain Condo Docs', 'Schedule Staging', 'Arrange Access/Key', and 'Input Listing in MLS'. Each task has a green checkmark and a due date.

1. To submit your listing paperwork to your Loop, find the first task in the list titled **“Submit Listing Paperwork to Dotloop for Review”**.

This screenshot is identical to the one above, but the first task, 'Submit Listing Paperwork to Dotloop for Review', is highlighted with a red rectangular box. The task's due date, '6/14/2020', is also visible. The rest of the interface, including the sidebar and navigation bar, remains the same.

2. Select the small drop-down arrow next to the task date to expand this item. Select the green **Dotloop** button to connect directly to your Dotloop account to complete the document submission.

TASKS DETAILS

35 tasks remaining add task

upcoming DUE

✓ Submit Listing Paperwork to Dotloop for Review 6/14/2020 ^

Make sure to submit and process all applicable paperwork to your office in a timely fashion.

DOTLOOP ← done edit more

✓ Send Gift, Optional 6/14/2020 ^

✓ Seller Letter 4: Thank you for hiring us 6/14/2020 ^

✓ Create Property Prep-List 6/16/2020 ^

✓ Complete Recommended Seller Docs in Dotloop 6/16/2020 ^

✓ OrderTitle V (septic inspection) 6/16/2020 ^

✓ Obtain Condo Docs 6/17/2020 ^

3. Next, you can select the item titled **“Complete Recommended Seller Docs in Dotloop”** to find other documents suggestions for submission.

TASKS DETAILS

35 tasks remaining add task

upcoming DUE

✓ Submit Listing Paperwork to Dotloop for Review 6/14/2020 ^

✓ Send Gift, Optional 6/14/2020 ^

✓ Seller Letter 4: Thank you for hiring us 6/14/2020 ^

✓ Create Property Prep-List 6/16/2020 ^

✓ Complete Recommended Seller Docs in Dotloop 6/16/2020 ^

What's Next? Client Info Form, Lead Paint Acknowledgement, LE Inclusion/Exclusion Form, LE Insurance Disclosure, LE Mortgage Authorization Form, LE Consent to Open House, LE Utility Costs, and Sellers' Statement of Property Condition.

done edit more