

# Dotloop Training | **ADVANCED OUTLINE/RESOURCES**

.....

## **SUPPORT**

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

- Website: [support.dotloop.com](https://support.dotloop.com)
- Email: [support@dotloop.com](mailto:support@dotloop.com)
- Phone: 888-Dotloop

## **TRAINING OPTIONS**

Email [training@dotloop.com](mailto:training@dotloop.com) if you have questions about our additional training options:

- Weekly Webinars [CLICK HERE](#)
- Dotloop Certification Programs [CLICK HERE](#)
- Custom webinar consultations [CLICK HERE](#)
- Dotloop Pro [CLICK HERE](#)

## **ACCOUNT CUSTOMIZATION**

### Outline

- Adding Service Providers
- Creating document sets and custom document templates (includes hot key tips)
- Creating task templates and adding clauses

### Resources

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

Creating document folders [CLICK HERE \(video\)](#)

Saving default information into document templates [CLICK HERE \(video\)](#)

Creating task templates [CLICK HERE \(video\)](#)

Creating clauses [CLICK HERE \(video\)](#)



# Dotloop Training | **ADVANCED OUTLINE/RESOURCES**

.....

## **LISTINGS**

### Outline

- Making your listing searchable
- Setting up an 'Easy Offer' folder

### Resources

Making your listings searchable [CLICK HERE \(video\)](#)

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

## **LISTINGS CONT. - MANAGING OFFERS**

### Outline

- Scenario 1: The buyer's agent uses dotloop and successfully connects to your listing
- Scenario 2: The buyer's agent uses dotloop but you need to merge their loop into your listing
- Scenario 3: The buyer's agent does NOT use dotloop and sends you offers via email
- Scenario 4: Dual Agency

### Resources

How a buyer agent connects to your searchable listing [CLICK HERE \(video\)](#)

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

Uploading PDF offers using the email-in feature [CLICK HERE \(video\)](#)

Dual Agency [CLICK HERE \(video\)](#)



## **MAKE A COPY**

### Outline

- Examples of when to copy documents as 'dotloop templates'
- Examples of when to copy documents as a 'flat PDF'

### Resources

Make a Copy [CLICK HERE \(support article\)](#)

## **HOST IN PERSON SIGNING**

### Outline

- Opening multiple documents
- Signing back in after the client esigns

### Resources

Host In Person Signing on your computer [CLICK HERE \(video\)](#)

Host In Person Signing on iOS [CLICK HERE \(video\)](#)

Host In Person Signing on Android [CLICK HERE \(video\)](#)

## **INTEGRATIONS**

### Outline

- Directory
- Google drive and Google contacts
- Premier Agent Integration

### Resources

Premier Agent integration [CLICK HERE \(support article\)](#)

Integration directory [CLICK HERE](#)



## **NEXT STEPS**

- Consider taking our online CE course. For state availability [CLICK HERE](#)
- Consider our Certification Programs [CLICK HERE](#)
- On a Team? Ask us about dotloop for Teams. Email [training@dotloop.com](mailto:training@dotloop.com)

