Dotloop Training | BEGINNER OUTLINE/RESOURCES

: : : : : : : : : : : :

SUPPORT

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

- Website: support.dotloop.com

- Email: support@dotloop.com

- Phone: 888-Dotloop

TRAINING OPTIONS

Email 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

LOGIN

Outline

- Signing up through your office's invite email vs. signing up as an individual agent

- Logging in at dotloop.com

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)

NAVIGATION

Outline

- Homepage/Global Navigation Bar
- Completing your 'My Account' section and adding your association

Resources

General Navigation CLICK HERE (video)

Trusted Service Providers CLICK HERE (video)

LOOP CREATION (LISTING)

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

Add/remove/edit people CLICK HERE (video)

DOCUMENT TEMPLATES

Outline

- Auto-filling/editing document templates

Resources

Adding/auto-filling document templates CLICK HERE (video)

: : : : : : : : : : : :

SHARING DOCUMENTS

Outline

- Sharing permissions

- Client Esigning Experience

- Submit 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 OFFERS

Outline

- Using multiple folders to keep offers organized

- Adding/editing PDFs, splitting PDFs, rotating PDFs

Resources

Adding/editing PDFs, splitting PDFs, rotating PDFs CLICK HERE (video)

MANAGING HOME PAGE

Resources

Filtering loops on your homepage CLICK HERE (video)

NEXT STEPS

- Register for our Advanced training webinar <u>CLICK HERE</u>

- Consider our online CE course. For state availability <u>CLICK HERE</u>

- Consider our Certification Programs <u>CLICK HERE</u>

- On a Team? Ask us about dotloop for Teams: training@dotloop.com