# LISTING Loop Rules / Best Practices (for linking, making it searchable for offers)

LISTING AGENT ...

1. Create your loop
    - From dotloop, Name loop the property address as listed in the MLS
        - If listing already active in MLS, select property from drop down with SOURCE: your MLS and import data
2. Click 'VIEW DETAILS'
    - Work your way down the page – this data autofills to your forms.
        - Add photo
        - Loop type and status
        - Add people and assign their roles (don't forget yourself)
            - Email address required to eSign/Cell Phone required to text from app
            - Don't add to team!
            - Send intro with message only to test email address
        - Property Address, MLS # etc. if not already imported from MLS.
        - Click 'SAVE', then click 'BACK TO LOOP' when done with this page

    **Be sure you have completed the following as the listing agent:**

    1. Loop type = listing
    2. Loop Status = active
    3. Your Role = Listing Agent
    4. Complete property address section including MLS #
3. Add documents
    a. Rename folder, select documents to add to loop
    b. Click check box to select documents to Open & Prepare
    c. Review Autofill fields for accuracy and continue
    d. Complete remaining fields, review documents for accuracy, review signature fields for proper assignment, Save when done.
4. Click Share
    a. Choose who to send to, set permissions, enter a message, PDF attachment if applicable
5. Add new folder, name 'PUBLIC '
    a. Add a copy of MLS supplemental documents to folder
    b. Activate Set Up Easy Offer
6. Once listing is active in MLS, go to view details screen, scroll to Property Address section and enter address or MLS # in search field. Select property from drop down with SOURCE: your MLS and import data

Merging ...

- Sorry, you really can only merge if both loops have all the same people or nothing has been shared.
- If you have more than one loop, copy documents over to the linked loop and archive the other loop you do not want to use. Be sure you set your filters to hide archive.

# OFFER Loop Rules / Best Practices
# (for linking, and avoiding 2 loops)

BUYING AGENT ...

1. Create a loop
   A. **If you have not created a loop**
      1. Click on the dotloop icon from the MLS listing, enter your dotloop login when prompted and proceed with creating a loop. (LOOPIT)
         - This will autofill data to the view details for you and link to the listing agents loop for easy offer.
      2. Log into your dotloop account and click create loop, enter property address and select property from drop down menu options that says DOTLOOP and import data from listing agent's loop.
         - This will autofill data to the view details for you and link to the listing agents loop for easy offer.

   B. **If you have already created a loop**
      1. Go to view details of your loop and under the property address section, enter property address or MLS # in search field, the select property from drop down menu options that says DOTLOOP and import data from listing agents loop.
         - This will autofill data to the view details for you and link to the listing agents loop for easy offer.

   - ***Once you have linked to the listing agents loop, when you share documents, your documents will be added to a new folder in their loop instead of creating a second loop.***
   - ***Once you have linked to the listing agents loop, if the listing agent has created a public folder, your loop will receive a folder with documents shared by the listing agent.***
2. Click 'VIEW DETAILS'
   - Work your way down the page – this data autofills to your forms.
     - Add photo
     - Loop type and status
     - Add people and assign their roles (don't forget yourself)
       - Email address required to eSign/Cell Phone required to text from app
       - Don't add to team!
       - Send intro with message only to test email address
     - Property Address, MLS # etc. if not already imported from MLS or Listing Agent Data.
     - Click 'SAVE', then click 'BACK TO LOOP' when done with this page
3. Add documents
   a. Rename folder, select documents to add to loop
   b. Click check box to select documents to Open & Prepare
   c. Review Autofill fields for accuracy and continue
   d. Complete remaining fields, review documents for accuracy, review signature fields for proper assignment, Save when done.
4. Click Share
   a. Choose who to send to, set permissions, enter a message, PDF attachment if applicable

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