

Dotloop Integration

User Setup: All Users

What is Dotloop?

Dotloop is an online workspace that connects everyone and everything needed to complete a real estate transaction in one place. Dotloop allows you and your agent to edit, complete, sign and share documents without ever needing to print, fax or email.

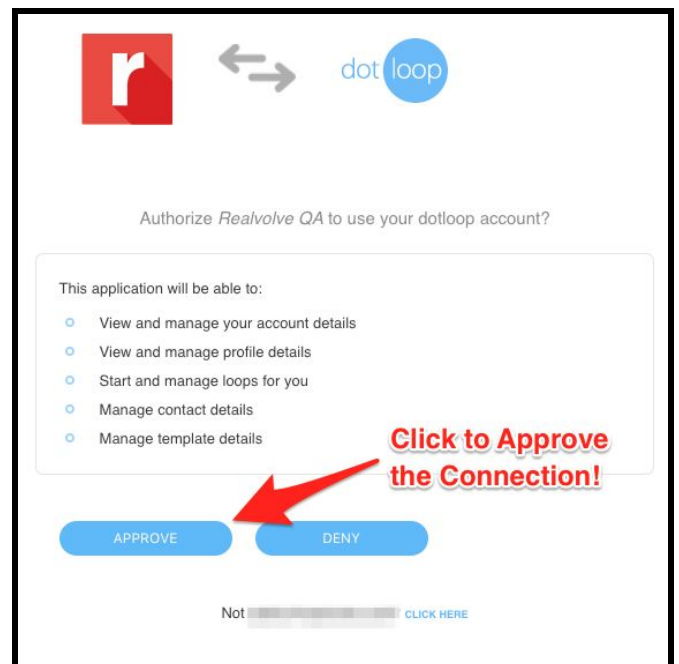
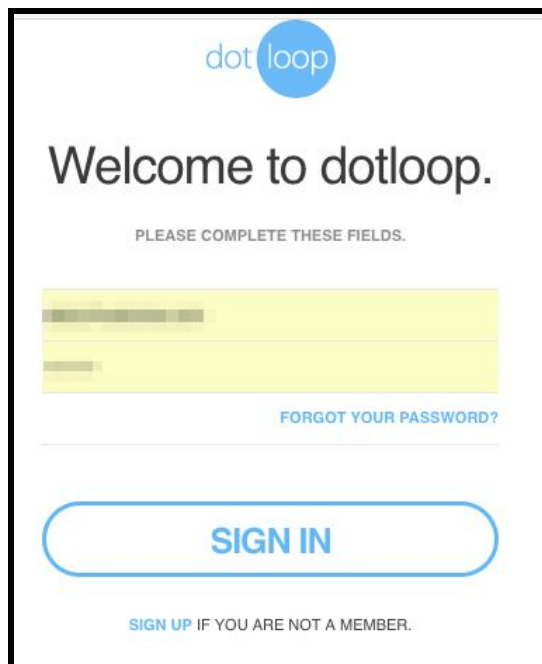
Benefits of Integrating Realvolve with Dotloop:

The Integration between Realvolve and Dotloop reduces data entry by creating loops from the realvolve property and transaction screens and transferring common fields as well as syncing party members from the people tab. The integration is capable of creating new loops or connecting properties and transactions to existing loops when needed. Users can also select loop templates during the loop creation process.

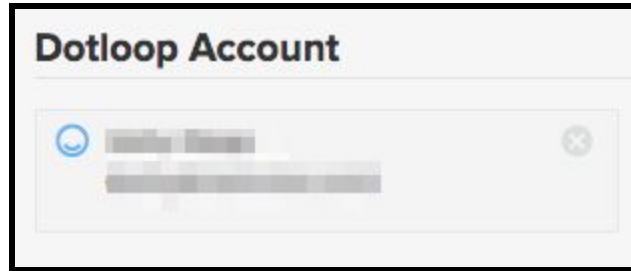
[Click Here to See Video](#)

How to connect your Dotloop Account:

To connect your Dotloop account go to SETTINGS > INTEGRATIONS, scroll down the list of available integrations to the section labeled "Dotloop Account". Click on the **[Add Dotloop Account]** button to display the welcome screen and sign in to your Dotloop account. Click the **[APPROVE]** button to approve the Dotloop integration.



Once approved the Dotloop account information will be displayed in the integrations area.



To disconnect the account click on the (x) button to the right of the Dotloop user name and email.

How does the integration work?

Click on the Dotloop icon in the upper right corner of the property record.

Realvolve will display a popup window to collect some basic information to proceed. Select the profile (if there are multiple profiles available) Remember that only one loop can be connected to a Realvolve property so choose the correct profile as needed. Then select **Create a new Loop** to start a new loop from the realvolve property and select a Loop Template when needed.



Sync with Dotloop [Close]

Profile Default Profile [x] [v]

Option

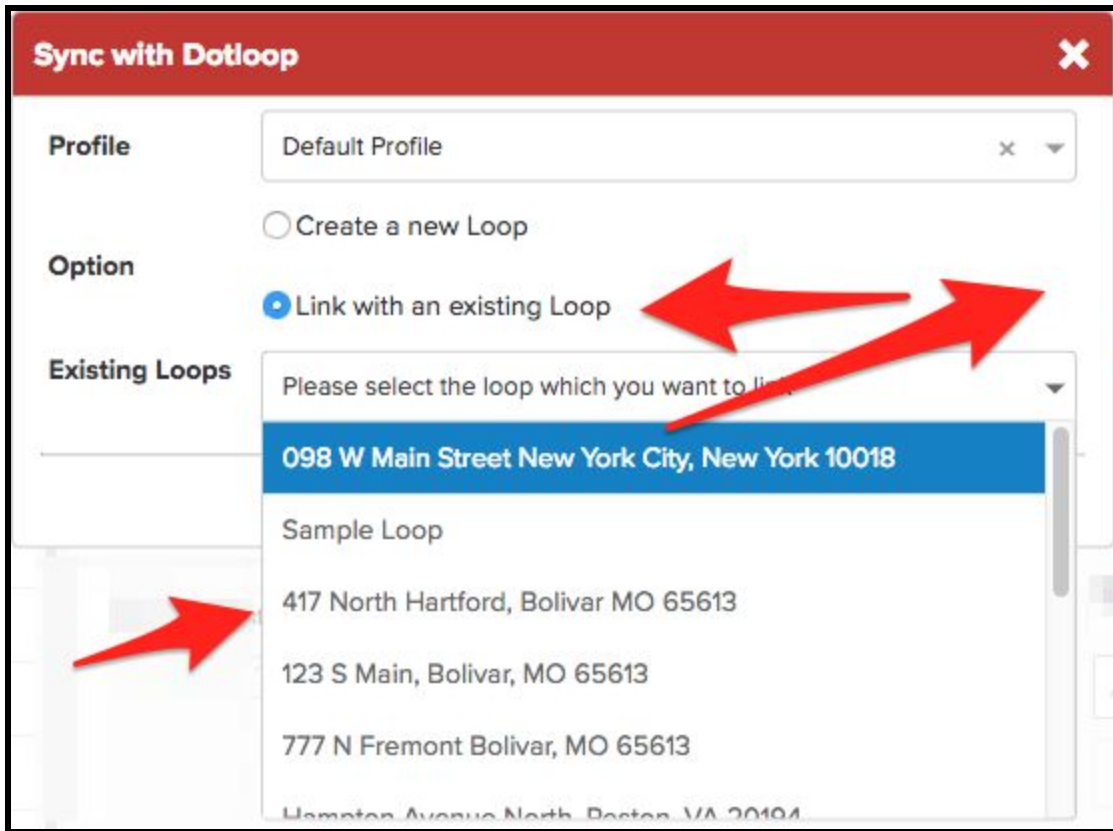
Create a new Loop [Red Arrow]

Link with an existing Loop

Loop Templates* Offer [x] [v] [Red Arrow]

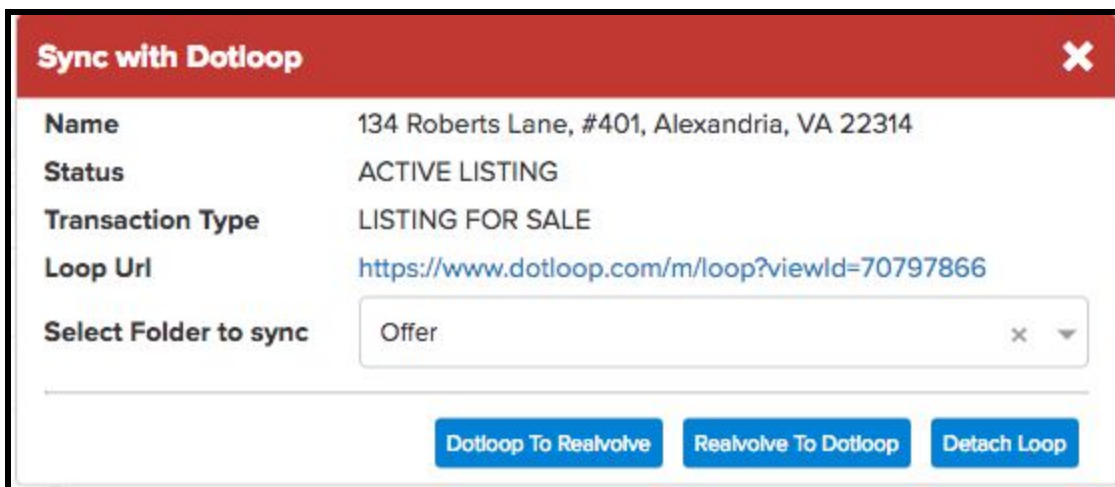
Cancel Submit

Select **Link with an existing Loop** if a loop for this property already exists and you want to connect to it.



After choosing **Create a new loop** or **Link to an existing loop**, realvolve will begin the process of making the integration connections. This process can take a few minutes so be patient.

After creating a loop from a Property (Listing) the system will show the following information when the Dotloop icon is pressed. The Name / Address, Status, Transaction Type as well as the loop URL and folder to sync.



Click on the Loop URL link to open a new tab with this loop

Choose the Dotloop folder to sync with the Realvolve files tab of the property.

Decide which direction you want to sync the data... **Dotloop to Realvolve** will sync all data in Dotloop into Realvolve. **Realvolve to Dotloop** will sync all data in Realvolve into Dotloop.

If you need to disconnect a loop from a property or transaction then click on [**Detach Loop**]

If a transaction is started from a property then the Dotloop link is transferred to the transaction and syncing can not be initiated from the property and must be done in the transaction. Clicking on the Dotloop icon from the property will show basic information but the buttons will not be available.

Sync with Dotloop ✕

Name	134 Roberts Lane, #401, Alexandria, VA 22314
Status	ACTIVE LISTING
Transaction Type	LISTING FOR SALE
Loop Url	https://www.dotloop.com/m/loop?viewId=70797866
Linked Transaction	134 Roberts Lane, #401, Alexandria, VA 22314

Clicking on the Dotloop icon from the transaction in this case will show the following popup with syncing buttons. When a property is connected to a realvolve transaction, the transaction is the authority and all syncing is done from the associated transaction and NOT the property. Any property information that is in Dotloop will be sync'd back to the linked property of the Realvolve transaction.

Sync with Dotloop ✕

Name	134 Roberts Lane, #401, Alexandria, VA 22314
Status	UNDER CONTRACT
Transaction Type	PURCHASE OFFER
Loop Url	https://www.dotloop.com/m/loop?viewId=70797866
Linked Property	134 Roberts Ln Alexandria, VA 22314
Select Folder to sync	<input type="text" value="Offer"/> ✕ ▼

[Dotloop To Realvolve](#) [Realvolve To Dotloop](#) [Detach Loop](#)

Known Limitations

- If an email address of a contact is removed from Realvolve, On running a **Realvolve to Dotloop** sync - it is not removed from Dotloop. If we now run a **Dotloop to Realvolve** sync the email address will be populated back into the home email field of Realvolve.
- The user is not allowed to connect a new Dotloop account if they have already tried connecting a Dotloop account which is connected by another user.
- In Realvolve, a party member must have a first and last name. Dotloop will not add the contact if they do not have a first and last name when the Realvolve to Dotloop sync is performed.
- When a synced Transaction is deleted and restored back in Realvolve, and the home email address of a party-member is updated. A duplicate participant in Dotloop is created for the role which was updated.

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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