

Creating a Loop (Dotloop)

Basics: 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.

Connecting your Dotloop account:

If you have not done this yet, visit: **User Setup 03: Dotloop Integration** for information on setting up your Dotloop integration.

How does the integration work?

Click on the Dotloop icon in the upper right corner of the property record. ([SEE VIDEO](#))

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]

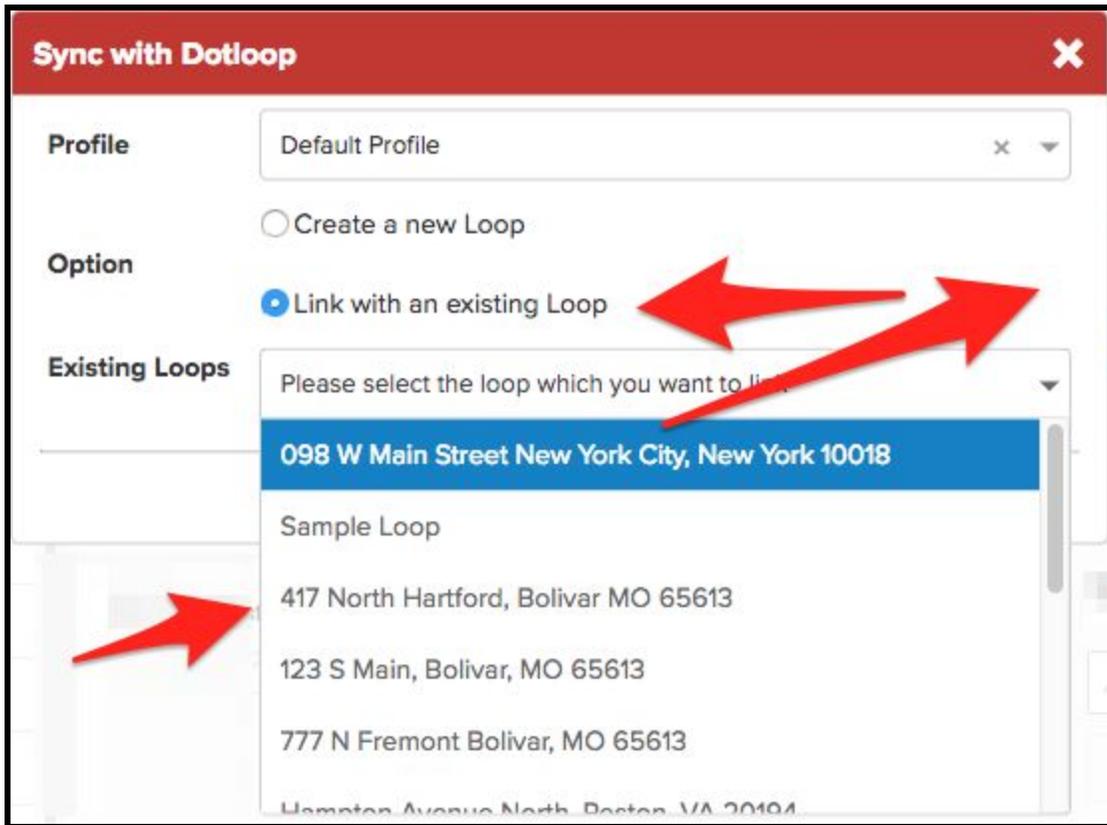
Profile: Default Profile [x] [v]

Option: Create a new Loop [Arrow] Link with an existing Loop

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

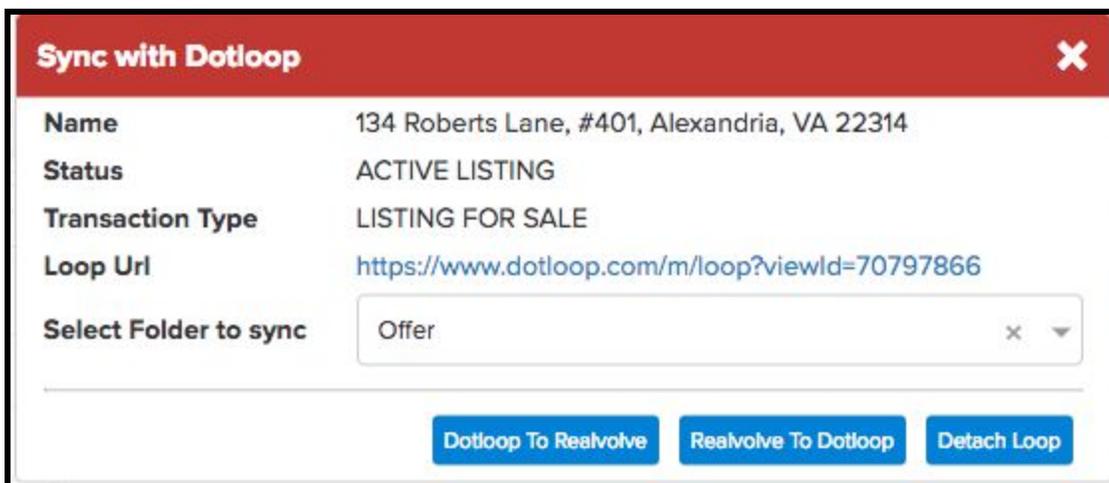
[Cancel] [Submit]

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.*

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.



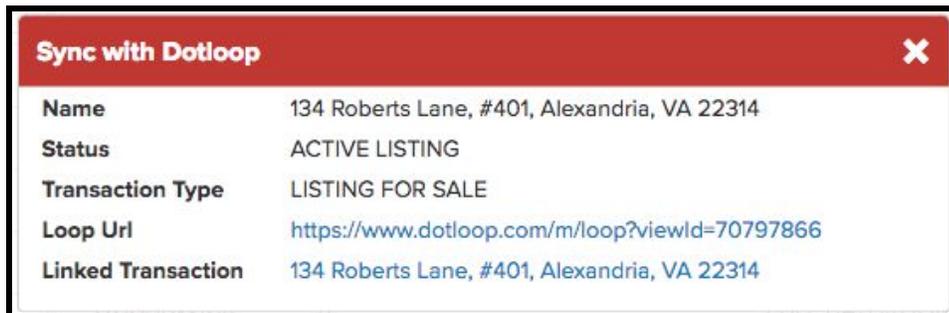
Click on the Loop URL link to open a new tab with this loop

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

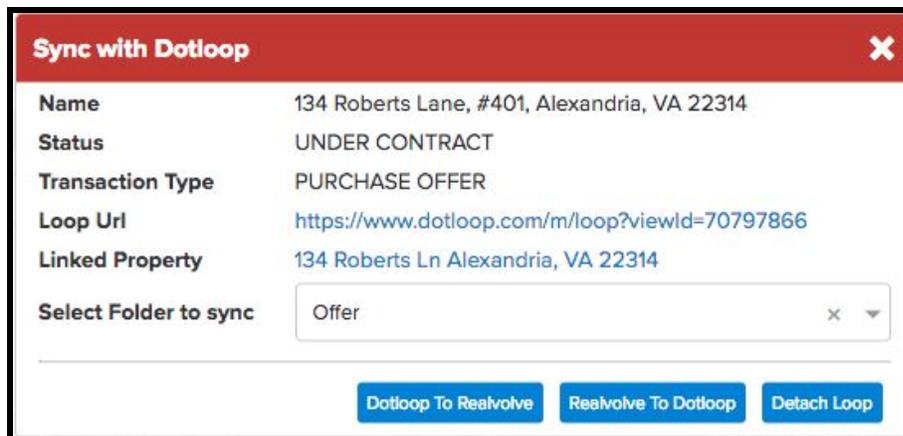
Decide which direction you want to sync the data. **Dotloop to Realvolve** will sync all data in Dotloop into Realvolve. **Realvolve to Dotloop** will sync all data in Realvolve into Dotloop.

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.



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 synced back to the linked property of the Realvolve transaction.



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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