DotLoop Workflow

1.) Click "**Add Loop**" at top right

2.) Name your Loop- Enter **Property Address and Unit #** (do not let it auto-populate, unless still active MLS listing)

3.) Select "**Leasing template**" (or another template when applicable, this cannot be undone, you must redo if you do not click the proper template)

4.) Optional to upload photo, or click "Done"

5.) Click view Loop

6.) At the top bar of Loop select status, *in order to submit any Loop for review it must be either "Under Contract" status*. **START AT THE TOP - where red is,** add rent and occupancy date.

7.) Click view details (next to status at top) to enter all details

8.) **Details** you must include:

-People:
- Add real estate company/property management company you are working with along with email (*do not add to team*) example : Compass Real Estate, email: caroline@compass.com

-Property Address:
- **Unique MLS #** (if professionally managed building create your own unique #, example for our office: 60611444)

-Financials:
- Buyers side commission if you are representing buyer

-Listing Information:
- Under REMARKS: indicate lead source: ie, Hubspot, Ryan, Viktoria, Personal, etc.

9.) Hit "**SAVE**" at bottom right

10.) Click "Go back to loop" at top of page

11.) **Click and fill out Invoice Template, under documents, START AT THE TOP (invoice # will be modified later, once reviewed)**
- Hit Save, click back button at top left to go back to the loop (**do not share!**)
   - 10.) Click "**Submit for Review**" at top right of your loop

(if you are missing anything you will be prompted to fill out missing info)

11.) Once you submit, I will review and approve your invoice. (**do not share**)

12.) You will receive a notification that the invoice has been approved (in notes). From there, please go to the Invoice and click **File, download.**

13.) **Email** invoice attachment to the agent/management company you have been working with directly.

-Look into HB Email templates to find the invoice template email-

And be sure to cc "billing@hudsonburnham.com"

Thank you and do not hesitate to reach out with any questions!

(An easy way to reach out is to hit the Note bubble at the top right corner of your Dotloop)