2017
New Agent Onboarding Checklist
New Agent - Director of Agent Services Checklist

☐ Obtain new Agent headshot and biography
☐ Order Business Cards (with photo if provided)
☐ Setup Reppert Factor login/Reppert Factor Handout
☐ Setup Agent Dotloop Account
☐ Add new agent to KW Bernardsville group in Dotloop
☐ Inform new agent of their ALC Ambassador
☐ Add agent name to Office Blast Email list via MC Intranet Groups
☐ Order signs (yard signs, riders, open house, etc.)
☐ Inform new agent of next Sales Rally - must attend
☐ Join NCJAR within 3 days of joining KW
☐ Schedule business Planning & Coaching with Productivity Coach
☐ Sign agent up for required Ignite class.
☐ Teach phone systems/Set up message on voice mail and test the system
☐ Create Mail Folder and show agent location.
☐ Add to Toolkit CMA
☐ Add to copier
☐ Schedule Orientation with Technology Coordinator & Managing Broker
☐ Give copy of written goals to Deb for Managing broker to  enter into CGI
☐ Introduce Training modules on KW Connect in mykw.com
These are required within the first 60 days of joining KWTS

New Agent - Office Coordinator Checklist

☐ Obtain key access card.
☐ Add name to company roster and email to new agent.
☐ Set up shadowing opportunities for open houses.
☐ Send out office e-mail/schedule.
New Agent - Technology Coordinator Checklist

☐ Mailchimp announcement for new agent
☐ Add MLS ID to White Pages Profile
☐ Obtain new Agent headshot and biography
☐ Dotloop Activated and Linked to Market Center
☐IDX Paperwork sent off – Takes 2-3 Days for approval and activation
☐ Scott LeRoy Marketing Questionnaire – Completed within 3 hours.
☐ Activate eEdge; eEdge Website/Placester Website;
☐ eEdge Email
☐ Submit KW.com Email for Approval;
☐ Check List Hub Box in KWLS;
☐ Profile to 100%
☐ Headshots Updated in all 4 Locations;
☐ ADMIN – MY ACCOUNT Section Updated with Phone Number, Email and Website;
☐ Logo Added to ADMIN – MY ACCOUNT Section
☐ Time Zone Changed To Correct MC Time Zone
☐ eEdge Website Template Update;
☐ Site Banner and Logo Updated;
☐ Communities Served Set Up
☐ eAgentc 1.2 Section Set Up
☐ 2.4 Hosting Section Fixed
☐ 2.4 Location Updated
☐ 2.4 Broker/ Team Information Updated
☐ 4.1 IDX Button Checked (IF Applicable)
☐ 4.5 Section Activated;
☐ KW APP Setup and Mobile Button Checked
☐ Add agent to Office Groups in KWTS intranet.
☐ Show Document Folder in KWTS intranet
☐ Show how to send backagent emails and posts.
☐ GSMLS Banner and Signature training
☐ Load KW Mobile App on Agent Phone
☐ Set up email forwarding from gmail
☐ Show agent www.TowneSquareGuide.com
☐ Set up Wifi and printers for laptop/cell phone through Reppert
☐ Download Mobile App
New Agent - Technology Coordinator Checklist contd

☐ MyKW.com training. Review tabs: Home, Technology, Resources etc. (KWLS, KW Connect, change password etc...)

☐ Intranet Training (How to send post, find documents etc)

☐ eEdge Database and Campaign overview/initial training

☐ Initial personal marketing guidance and options

☐ Michael Lewis Marketing sign in and review

☐ Dotloop overview/initial training

☐ Reppert help ticket training for printer driver set up.

☐ Give copy of Agent Resource Guide

☐ New Agent Training Date

☐ Sales Rally Date

☐ Schedule eEdge Website class

☐ Dotloop/Greensheet Training Date

☐ GSMLS Training Date

☐ Give Scott LeRoy Webinar Schedule to agent
# Logins and Phone Numbers

<table>
<thead>
<tr>
<th>Login Type</th>
<th>User Name</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mykw Login:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GSMLS Login:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reppert Factor/Office Computer Login:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copier Access</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KW Email Address:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gmail User Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dotloop Login</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALC Ambassador:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell Phone:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Keller Williams Towne Square Phone Extension:** __________

- Main office phone number: 908.766.0085 - Main office fax number: 908.766.2254
- Main office email: kw825@kw.com
- KWTS License (New Jersey Real Estate Commission) is: 0999108
- KWTS GSMLS office ID: 3789
- Our Firm's Federal Tax ID is: 26-3143342
- Our Referral Firm's Federal Tax ID is: 26-4727620
- The website of Keller Williams International is: www.kw.com
- Our Keller Williams Market Center ID number is 825
- North Jersey Association of Realtors is: 973.425.0110
- Hunterdon Somerset Association of Realtors is: 908.725.3117
- Garden State MLS is: 973.898.1900
- New Jersey Real Estate Commission is: 609.292.7272
- New Jersey Association of Realtors website is www.NJAR.com
- KWTS WiFi Access - Network: PUBLIC-KWBERNARDSVILLE Password: 9087660085