

# AGENT ONBOARDING CHECKLIST

We'll guide you through on-boarding through a series of emails, but also ask that you print and track your progress on this checklist to ensure we get you fully on board without missing any steps!

*Mentees to go over this form with the Mentor.*

## **To start:**

- 1) Complete the **online application**
- 2) Receive the Better Homes and Garden Real Estate Palmetto **Contract** to sign via Dotloop.
- 3) Move your license over to Better Homes and Garden Real Estate Palmetto
- 4) We'll get you added to and trained on all brokerage systems

## **Information you should know or have available while on-boarding...**

### **1) SC REAL ESTATE LICENSE**

*All agents must have an active license in good standing with the SC LLR.*

- ☐ I am not a SC licensed real estate agent, but am actively working to obtain my license.
- ☐ I am a SC licensed real estate agent. My license number is: \_\_\_\_\_
  - ☐ My license is Active and in good standing with LLR with no Board Public Action history against my license.  
My license renewal date is: \_\_\_\_\_
  - ☐ My license is Inactive and in good standing with LLR with no Board Public Action history against my license. I will take the actions necessary to bring my license back into Active status with the LLR before practicing real estate.

### **2) LOCAL REALTOR ASSOCIATION**

*All active agents must have a current membership with CTAR.*

- ☐ I am not a member of the CTAR yet. I will contact CTAR to begin the process immediately. ( [www.CharlestonRealtors.com](http://www.CharlestonRealtors.com) )
- ☐ I am a member of the Charleston Trident Association of Realtors (CTAR).  
My NRDS ID is: \_\_\_\_\_  
To look-up your NRDS ID: <https://login.connect.realtor/#!/forgotmember>

Note that CTAR charges brokerages a penalty for having active agents on-board who are not a member of CTAR. This fee will be passed on to the agent if the agent does not complete the process within their first two weeks of joining the brokerage..

### **3) MLS ACCESS**

*All agents must have their own access to Charleston MLS.*

- ☐ I already have access to the residential Charleston MLS. My MLS ID is: \_\_\_\_\_  
- I already know how to search, set up saved search, access CRS tax data, set up a listing, print the public and private MLS **Yes or No**
- ☐ I do not have access to the Charleston MLS. I will begin the process through CTAR.

*\*Reference to Better Homes and Garden Real Estate Palmetto Policy Manual Section.*

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*Training videos and additional content can also be found at [bhgpalmetto.com/agent-resources](http://bhgpalmetto.com/agent-resources)*

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- ☐ I have reviewed the MLS Rules/Regulations/Fines Video via TeamApp

## 4) SENTRILOCK ACCESS

- ☐ I already have an active Sentrilock account and the SentriKey Real Estate app.
  - I already know how to use SentriKey App, Open a lock Box Yes or No
- ☐ I do not have a Sentrilock account or the app, and will begin the process through CTAR.

## 5) ShowingTime ACCESS

- ☐ I already have an active ShowingTime app.
  - I already know how to use schedule a showing/inspection, give feedback, set-up a listing, set-up Profile Yes or No
- ☐ I do not have a ShowingTime account or the app, and will begin the process through CTAR.

## 6) Mentee Only

- ☐ I have reviewed the Mentor Contract.
- ☐ I selected a Mentor.

## Office Systems Onboarding Checklist

You'll receive an email invite to these brokerage systems:

- ☐ **TeamApp Access** - Our mobile brokerage office (<https://bhgpalmetto.teamapp.com>)
  - ☐ Desktop and App to be set up
  - ☐ I have reviewed "What to expect from Team App 101 and 102" **Video**
- ☐ **Dotloop Access** - For eSigning and document management. (<https://www.dotloop.com>)
  - ☐ Set up Dotloop Profile
  - ☐ I have reviewed "Set up Your Dotloop Profile" **Video**
  - ☐ **Dotloop Training Video and In person**
  - ☐ Sample Contract in Templates
- ☐ **CINC Set-up & Training**
  - ☐ **Intro to CINC Video** Training
  - ☐ Successfully log you into CINC and the CINCagent App
  - ☐ Set-up my CINC account profile
  - ☐ I have reviewed "Set-up my CINC account profile" **Video**
  - ☐ **CINC Training**
    - ☐ CINC 101 / Intro to CINC
- ☐ **Moxi Set-up & Training**
  - ☐ **Intro to Moxi Video** Training (presentation and websites)
  - ☐ Successfully logged yourself into Moxi
  - ☐ Set-up my Moxi website
  - ☐ **Moxi Training**
    - ☐ Moxi 101 / Intro

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- ☐ **GreenHouse**
  - ☐ **Received emails with log on information**
  - ☐ Successfully logged yourself into Greenhouse

Check out [bhgpalmetto.com/agent-resources](https://bhgpalmetto.com/agent-resources) for all the resources we offer.

- ☐ I have reviewed this website and reviewed the videos with-in

## Trainings Available for New & Existing Agent Training

Check off on all the Videos or In-Person Meetings you have completed

- ☐ Branding / Social Media Review **in Person**
- ☐ Update Voicemail and/or Set up a Free Google Voice Number
- ☐ Real Estate 101 **Video** - Required for all Agents (Located in TeamApp)
- ☐ Contract Training **Video and In Person** (Located in TeamApp)
- ☐ Moxi Listing Presentation **Video** (Located in TeamApp)
- ☐ Buyer Contract Explained **Video** (Located in TeamApp)
- ☐ Meet with Recommended Vendors
- ☐ Canva Training **Video and In Person**
- ☐ Canva How to use office Templates **Video**
- ☐ ShowingTime - How to Set-Up a Showing in ShowingTime App **Video**
- ☐ Practice Opening a Lockbox with Sentrilock at the Office
- ☐ How to Hold a 5 Star Open House **Video**
- ☐ Open House Visits & CoHosted Open House
- ☐ Visit at least 2 New Construction Neighborhoods
- ☐ Attend/Shadow at least 1 Closing/Inspection/Listing Photos
- ☐ Converting Customers to Clients Training with Mentor
- ☐ The Perfect Net Sheet **Video** Training
- ☐ Mail Farming a Neighborhood **Video** Training
- ☐ Update VoiceMail

## Social Media Set Up/Update if Established Agent

Check off all created or updated

- ☐ Joined BHG Palmetto Agents-Charleston (private Facebook group)
- ☐ Custom Web Domain (vanity website name) - Discuss with Brokerage
  - Can not include Real Estate, Realty, Brokerage, Better Homes...
- ☐ Set up/update a work gmail or redirected vanity email

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- ☐ Set up Email Signature (with SC Brokerage Disclosure) [bhgpalmetto.com/agent-resources](https://bhgpalmetto.com/agent-resources)
- ☐ Set up/updated FaceBook Business Profile / add Aimee Peterson as Admin
- ☐ Set up/updated Zillow.com Agent Finder Account/Watched **Video** how to set up
- ☐ Set up/updated Realtor.com Agent Finder Account
- ☐ Set up/updated Google My Business/Watched **Video** how to set up
- ☐ Set up/updated Linktr.ee/Watched **Video** how to set up
- ☐ Create a QR code in Canva/Watched **Video** how to set up
- ☐ Update Instagram/Twitter/LinkedIn if you use these accounts
- ☐ Apps needed:
  - ☐ Dotloop / Stack TeamApp / ShowingTime / SentiKey Real Estate / Flexmls Pro / Loom / Zoom / Canva / Adobe Scan
  - ☐ Agents that accept Brokerage Referrals: CincAgent / Opcity
  - ☐ Additional Suggested: MileIQ / Smart Receipts

**Please use 843-584-8326 (txt or call) or [office@bhgpalmetto.com](mailto:office@bhgpalmetto.com) for all real estate related communication with the brokerage.**

These go to all office staff and provide you with the quickest response. Since many work remotely the office is not always staffed, but we're always glad to meet you there. Just be sure to let us know ahead of time.