Agent Orientation Check List

***To be completed by Office Administrator, put into the Agent's personnel file, and turned into the Broker for review within 1 BUSINESS DAY after Orientation Meeting.**

***Any steps not completed should have notes as to why it wasn't completed, and the plan of action to ensure that it does get completed.**

Agent's Name:_____________________ Agent's Signature: ____________________
Sign Upon Completion

Office Administrator: _______________________________ ________________
Sign Upon Completion Date of Completion

Broker: ____ ________________
Review Signature (don't sign unless complete) Date of Review

*Office Administrator to Initial Boxes When Complete.

1) At least 1 business day prior to the Orientation Meeting, review the Agent's personnel file to ensure receipt of the following:

- ☐ Broker Hiring Checklist completed by the Broker

- ☐ Agent Set-Up Checklist completed by the Office Administrator

- ☐ Completed "Action Transfer Plan" provided by the Agent.
  A. Verify that all documents required to be submitted with the Transfer Action Form have been received and are in the personnel file.

- ☐ Ensure that the file contains a list of all Active Listings, along with fully approved Listing Transfer Authorization Forms, as provided by Broker.
  A. Log into MLS and verify that each MLS listing shows RE/MAX Homes & Investments as the listing office.

☐ Ensure that the file contains a list of all Pending Purchase Transactions, with fully approved Transfer or Assignment documentation, as provided by Broker.

If ANY of the above documents have not been completed and filed, reschedule the orientation meeting for another 2-3 business days out and follow up to ensure that the documents are completed before that meeting.

2) Security Deposit

☐ IF the Independent Contractor Agreement shows a security deposit to be paid, but no check was previously received, then ensure that the agent has brought their security deposit check as instructed under the Agent's "Action Transfer Plan".

A. IF they forgot their checkbook, see if they can pay by credit using our Pay Pal instructions.
B. IF they have their security deposit check, then follow the steps below:
    - Log into Lone Wolf
    - From Main Menu, select <Accounts Receivable> then click <Cash Receipts> then click <Misc. Cash Receipt>
    - Enter check received from "Agent's Name"
    - Enter date deposited, amount, check number, etc.
    - Click button "Add" to select account to post to. Select the liability account called "Agent Security Deposits" and enter the agent's name in the note
    - Click Store to record
    - Prepare deposit to make to bank

3) Confirm that Agent's Membership Information has been changed with their Realtor Association Board (ie. SEVRAR, PAR, etc.)

☐ See if agent has a print off from the association's web showing they are now with RE/MAX Homes & Investments. Otherwise, see if they have a copy of the Member Change Form they faxed to the association (as instructed to the agent in their Transfer Action Form). Put a copy of this in their file.

4) RE/MAX Profile Sheet (N/A for RE/MAX Transfers)

☐ IF the agent already provided the $390 payment required to be paid with the RE/MAX Profile Sheet during the hire process, then write N/A and with your initials. Otherwise, ensure that this payment is collected from the agent during Orientation in the form of a check, or by filling out the credit card payment information on the form.

A. Mail the original to RE/MAX International immediately along with the payment.

5) Alarm set up testing and acknowledgement

☐ Locate the Agent's 4 digit alarm code found on the Amendment to the ICA, test the code with the agent, and have the Agent sign the Alarm Acknowledgement Form.

6) Verify Long Distance Access

☐ Locate the Agent's 4 digit long distance code found on the Amendment to the ICA and test the code with the agent by doing the following:

A. Find an available phone.
B. Dial 9-1-520-628-6470 and enter the 4 digit code during the tone, and hang up if it gives no error message.

7) Install Printer Driver Software onto Agent's Laptop

☐ The agent is instructed on the Transfer Action Plan to bring their lap top to the orientation meeting if they want the ability to print to our printer. If they bring their lap top, then follow the instructions below. Otherwise, write N/A and initial next to this step:

A. Method #1 (for Window XP or older operating systems):
   - First make sure that the computer can access the internet (click on internet to see home page). If they can't connect, ensure they have wireless capability or plus a network cord from the computer to a network jack. If using wireless, you want to make sure that they are connecting to the wireless connection called "REMAX". If it asks for a security code (or WEP code), the code is 4803551300.
   - Once the internet is working, pull the vendor file for Hughes-Callahan located in the file cabinet in the conference room. In the folder you will find an install disk for Lanier printer drivers. Insert disk into agent's computer. You should also find an instruction sheet inside the disk folder.
   - After installing the software and restarting the computer, put the disk back in the file.
   - Go to Start Menu, select Control Panel, select printer option, you will come to a window showing all printers. The one with the checkmark is the new Lanier default printer. If any

other Lanier printers are showing, delete them. Highlight the default printer and right click, select properties, select printing preferences button, change your color default to black and white only. Select the tab called 'statistics' or 'user code', enter the agent's 4 digit security code shown on the ICA amendment. Click OK and try a test print to ensure it's working properly.

B. Method #2 (For Windows Vista):
   - Help the agent go to www.lanier.com
   - Click 'Support' on the toolbar, then click 'Drivers'
   - Use pull down menu for 'Color MFP' to select driver 'LD232c'.
   - Click on the operating system used by that computer
   - Download the driver for PCL 5c Driver
   - Follow the directions.
   - A window should appear called 'Select Printer'. You should see 3 choices of printers to install. It displays the Model Name and Connect To name. Highlight the option that shows 192.168.2.100 as the Connect To option and click next. If this option isn't displayed, cancel out of installation and re-insert the disk and start over. Sometimes it takes 1 or 2 tries for this option to appear. If it still doesn't appear, then you probably are not connected to the internet using the RE/MAX network.
   - It will install and prompt you to finish and automatically restart.
   - After restarting, go to Start Menu, select Control Panel, select printer option, you will come to a window showing all printers. The one with the checkmark is the new Lanier default printer. If any other Lanier printers are showing, delete them. Highlight the default printer and right click, select properties, select printing preferences button, change your color default to black and white only. Select the tab called 'statistics' or 'user code', enter the agent's 4 digit security code from the agent's ICA amendment. Click OK and try a test print to ensure it's working properly.

8) Verify Zipform Access

☐ Verify that agent can access their new Zipform account set up by Office Administrator under the Agent Set-Up Checklist. Make sure that their forms display RE/MAX Homes & Investments at the bottom of a form.

9) Agent Acknowledgment

- [ ] Have the Agent review this Orientation checklist and indicate their agreement by signing at the top.

10) Broker Review

- [ ] Turn the agent’s personnel file into the Broker for review signature on this Orientation checklist and filing.