



Columbia

R e a l E s t a t e

Agent On-Boarding Workbook

Getting Started

- ☐ **1.** Transfer or Activate License for Real Estate Salesperson
 - Costs \$50 paid to MREC when you turn it in
- ☐ **2.** Complete the Board of Realtors New Member Orientation
- ☐ **3.** Complete the Board of Realtors Joining Paperwork and pay dues
- ☐ **4.** Policy Manual
 - This is Columbia Real Estate's general policy manual. The last page has a section for you to sign acknowledging you received the manual.
- ☐ **5.** Independent Contract Agreement/ W9
 - This is an agreement between you and CRE acknowledging the general working protocol and agreements of our contractor relationships
- ☐ **6.** Agent Commission Form
 - This document describes in detail the commission plans and allows you to communicate which plan you'd like to choose

Back Office

- ☐ **1.** Brokermint
 - Brokermint is our file-keeping software where you can see what documents are needed for your transactions.
 - This is where you will submit your documents for review before closing. Once a document is uploaded, please submit it for review at that time.
 - There are a couple of ways to get your documents into Brokermint. You can email them into the transaction or upload them from your computer.
 - The "Library" in Brokermint is regularly updated with forms and templates.
 - Make sure to check your "Calendar" to see which tasks are due.
 - You will get a welcome email with login instructions.
- ☐ **2.** Website
 - You will have your own website through BoomTown. Your username will be your CRE e-mail address, and you will receive an e-mail to reset your password.

- If you have any personal domains, please request help getting those set up.
- ☐ **3.** Connect your computer/laptop to office printers
- ☐ **4.** Connect your laptop and phone to the WiFi networks in the office
- ☐ **5.** Visit and save the Agent Resources webpage as a shortcut:
www.columbiarealestate.com/agentresources

E-mail

- ☐ **1.** You will be assigned a secure CRE email address to use and provided a password
- ☐ **2.** Set up an auto response on your old email address that lets people know about your new address, and forward those emails to your new address
- ☐ **3.** Export your contacts to your new email
- ☐ **4.** Create your email signature, complete with your name, phone number, the name of the Brokerage, and our phone number

Social

- ☐ **1.** Update your personal and business pages with the brokerage change. Update your email address and website. Be sure you put your license number and your brokerage info in the About Me sections. Go through and delete any older posts you have of your old brokerage logo or info, if appropriate.
- ☐ **2.** Join the private Facebook group for Columbia Real Estate Agents
- ☐ **3.** Like Columbia Real Estate's Facebook page and invite your friends to like our page
- ☐ **4.** Follow Columbia Real Estate ([columbia.real.estate](https://www.instagram.com/columbia.real.estate)) on Instagram

CRM and Leads

- ☐ **1.** BoomTown is our Customer Relationship Management system (CRM). It's where all your contacts and leads will go to help you nurture those relationships. It allows you to set up some automation to help keep up with people well. BoomTown has a lot of drip campaigns and tools to help you succeed. Be sure to do your training modules through there.
- ☐ **2.** Import your client list and set them up for follow up

- ☐ **3.** Put your name on the Lead Rotation and express which types of leads you would like to receive
- ☐ **4.** Set your Lead Settings to receive notifications by text and email once a lead is assigned to you
- ☐ **5.** Ensure that you follow up on all leads immediately or let the managing broker know if you would like the lead reassigned to someone else

Agent Materials

- ☐ **1.** Headshots
 - Arrange with our photographer a day/time to get your headshots taken
- ☐ **2.** Business cards
 - You have a \$75 credit to order business cards. You can order through us or if you would like to create your own, please submit the receipt for reimbursement. Ensure that all custom business card designs are approved by the managing broker.
- ☐ **3.** Property For Sale signs
 - These are provided at no cost and are located at the office. A certain number of signs will be assigned to you. Please safely store the ones not in use. If you need more, please contact the office.
- ☐ **4.** Sign Riders
 - These will go on the For Sale signs and should contain your name and phone number. You will need to order these.
- ☐ **5.** Open House signs
 - We have some of these at the office to be displayed the day of the Open House. Please bring them back immediately after the open house has finished.
- ☐ **6.** Directional signs
 - These are plastic signs that are to be placed at the busiest road near your listings, pointing the way to the home. One per listing. Bring back immediately after closing.
- ☐ **7.** Lockboxes
 - We have CBOR Supra lockboxes and HOM lockboxes. A certain number of lockboxes will be assigned to you. As with the signs, please safely store the ones not in use. If you need more, please contact the office.

- It's also a good idea to keep one or more Combination lockboxes as back-up options. These can be purchased at any hardware store.

FlexMLS

FlexMLS is the MLS system in our area. There's a lot to learn from Flex, Showing Time, RPR and Transaction Desk apps inside of the FlexMLS agent page. Each of these programs is critical to your success as an agent. If you need training on these please don't hesitate to ask and we'd be happy to help.

<https://cbr.flexmls.com/>

TransactionDesk

Transaction Desk is a software that is tied to FlexMLS. It is where you will complete your necessary forms (ie; Contracts, Buyer/Seller Agreements, disclosures, etc..). Be sure to watch the below training to become familiar with how to best use Transaction Desk.

Training

☐ 1. FlexMLS

- <https://flexmls.wistia.com/medias/joixr7caig>
- <https://flexmls.wistia.com/medias/lhf9ddroyo>
- <https://flexmls.wistia.com/medias/mlvfcpx6s>
- <https://flexmls.wistia.com/medias/pnqxq3iezu>

☐ 2. TransactionDesk

- <https://vimeopro.com/user18881949/transactiondesk-new-full-length-videos/video/254735257>
- <https://vimeopro.com/user18881949/transactiondesk-new-full-length-videos/video/253279563>
- <https://vimeo.com/141460993>
- <https://vimeo.com/141418488>

☐ 3. Brokermint

- <http://support.brokermint.com/en/articles/2342-agent-training>
- <http://support.brokermint.com/en/articles/2131387-incoming-transactions-within-mls-integration>
- <http://support.brokermint.com/en/articles/2950043-library-e-signature-templates>

☐ **4.** ShowingTime

- <https://support.showingtime.com/img/mls/flex/flexconfigure.gif>
- <https://support.showingtime.com/img/mls/flex/flexschedule.gif>
- <https://showingtimemls.uservoice.com/knowledgebase/articles/1140670-mobile-app-for-sellers>
- <https://showingtimemls.uservoice.com/knowledgebase/articles/499193-listing-configuration-settings>
- <https://setup-sso.showingtime.com/Home/Help>

☐ **5.** BoomTown

- <https://boomtown.force.com/successcommunity/s/article/Training-How-to-Access-Training-Video>

Apps

- ☐ **1.** Flexmls Pro
- ☐ **2.** ShowingTime
- ☐ **3.** Supra eKEY
- ☐ **4.** TransactionDesk
- ☐ **5.** BoomTown

Office Information

Columbia Real Estate, LLC license number is **2013037752**
 Company phone number 573-777-7653

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 2100 W Broadway Columbia MO 65203

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 2100 W Broadway Columbia MO 65203

320 E Broadway Columbia MO 65202

Website:
Columbiarealestate.com