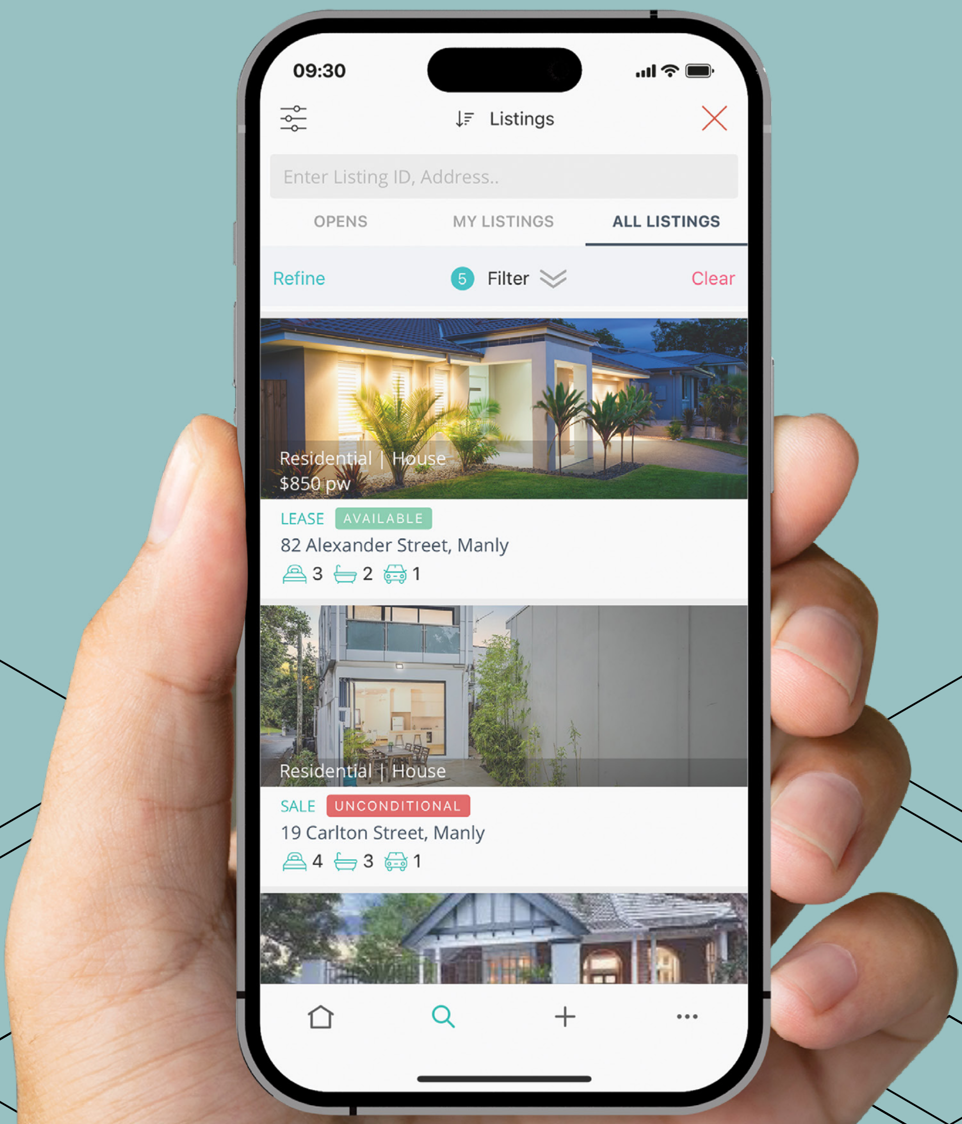
Agentbox

Onboarding Checklist



Welcome to the Agentbox Community!

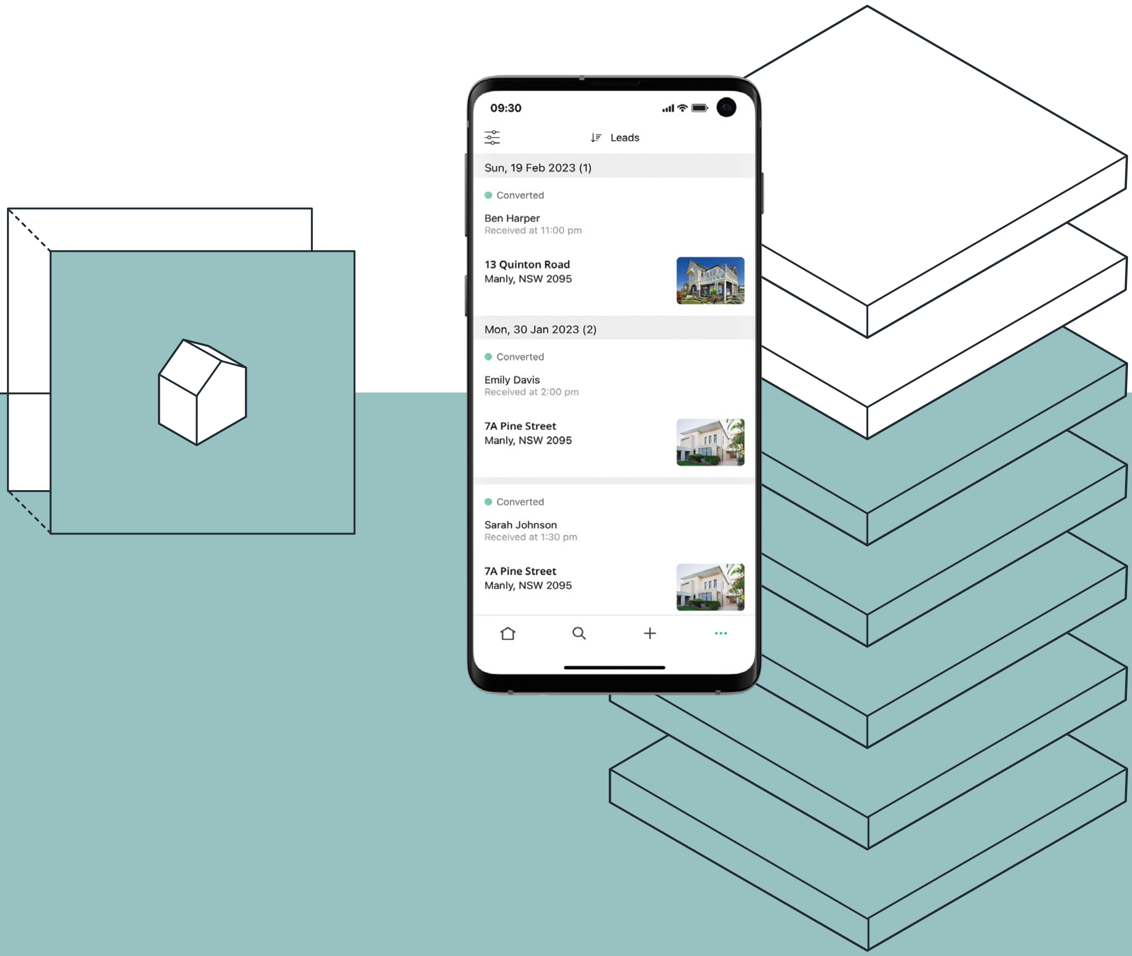
To get the most from your Agentbox platform, we recommend you nominate a person to be the **Agentbox Champion**, so to ensure all of the below items are completed.

Depending on the size of your office and the number of listings you have, you may need to dedicate more than one person to this project.

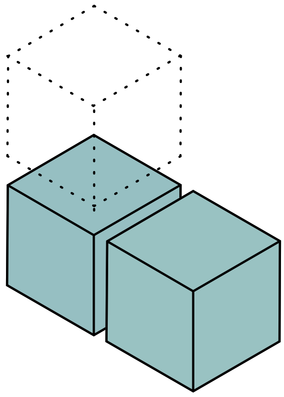
During your Onboarding, you will have the help and support of one of our friendly and knowledgeable Project Coordinators and Training Consultants. Our Agentbox team will guide you through the below items to ensure they are completed, and you have the tools you need to get the most out of your Agentbox subscription.

To ensure your success, and to minimise any disruption to your business operations, please ensure sufficient time is allocated during your Onboarding setup phase, and the below Onboarding Checklist is considered prior to launch.

We look forward to working with you during your Onboarding phase!



Before Launching Agentbox Checklist



COMPLETE BEFORE LAUNCH DAY

TASK	DONE
Complete Agentbox Academy online eLearning training: Ensure all staff have logged into Agentbox Academy and have completed their allocated courses before launch day. Click here to access. **Note:** If you have purchased the Sales Trust Module, the Sales Trust Module eLearning course is a mandatory requirement for set ups.	☐
How will you be managing commissions in Agentbox? Have you purchased the Debit & Credit Commissions Module? Tells us about your unique business requirements via this short form, and we will be able to discuss alternate configurable options for your new Agentbox system. Alternatively, we will proceed enable your module to commence commission reports to start from your launch month, with our default flexible configuration options.	☐
Send Portals & Integration changeover requests: Two days prior to your go-live date, contact your account manager for all portals and integrations (such as Domain, etc.) to advise that Agentbox is your new uploader. Ask them to send a set up request to support@agentbox.com.au.	☐
Office Details: Have the following information available for the Onboarding Walkthrough: ABN & Office Information Licensee details, Licensee number and Corporation number. **Staff photos:** You will be required to upload staff photos for sales agent marketing. Ensure you have saved to your drive staff profile photos in size 480 x 480px.	☐
Compliance Documentation: You will be required to re-upload the following items for your available listings based on the requirements of your state. Please save the below documents in PDF format (max. 8mb per document) to a local drive. Available Sales Listings – Agency Agreements Available Rental Listings – Managing Agency Agreements Available Sales Listings – Statement of Information (VIC clients only) Available Sales Listings – Contract of Sale (NSW clients only)	☐
Review Current Exchanged Listings: Listings that are pending settlement will need to be resubmitted. Please be prepared with the address and paperwork for all listings in your office that are currently pending settlement this includes the offer price and details, accepted offer date, unconditional date, vendor information, purchaser information, sales commission % and deposit information.	☐

Post Onboarding Walkthrough Session

DAYS 1 TO 2

TASK	DONE
Staff Cards & My Office	
Staff Cards: Review all staff cards and ensure the following information has been completed for each team member: · Provide Staff Access · Set staff targets · Review Staff Permissions · Upload staff photos · Create teams · Enable SMS (available upon purchase) · Sync Outlook or Gmail in 'Connections' · Customise email signatures	☐
System Configuration: Ensure all custom classes, contact sources, appraisal sources and enquiry sources are entered and correct. Review other configuration options and system defaults that are available to you.	☐
Portals & Integrations: Follow up any outstanding portals & integrations. From your go-live date, Agentbox will be ready to connect! Reach out to your point of contact at that website, advise them that you are now using Agentbox. They will need to send a Portal Feed Request to support@agentbox.com.au.	☐
Listings	
Available Sales Listings: Check all Available listings and ensure all relevant text and photos are correct. · Tick relevant portals · Add any current offers on the property · Add open for inspection times · Add commission value · Add vendor details & vendor solicitor · Add new listings that are pending · Re-upload compliance documentation - Agency Agreement, Contact of Sale (NSW clients only), Statement ofinformation (VIC clients only)	☐
Sold Sales Listings: Listings that are pending settlement · Add vendor & vendor solicitor · Process through to Conditional · Add offer with purchaser details or Unconditional status · Accept offer · Complete commissions tab	☐

Setting Up Additional Modules

DAYS 2 TO 7

TASK	DONE
Leads Capture Module The Leads Capture Module will capture leads from sources such as realestate.com.au and domain.com.au automatically into your CRM to build your contact database within Agentbox. Avoid duplicate contacts created, by matching new enquiries with existing records in your CRM to ensure your database remains clean.	
Update Realestate.com.au Agent Admin Profiles: Enter your unique capture email address to all agent profiles in the Agent Admin section of your realestate.com.au account that you wish to capture enquiries from.	☐
Review Leads Capture System Configuration: Review the configuration settings of leads capture.	☐
Provide Leads Capture Access: Issue relevant Permissions to staff via individual Staff Cards.	☐
Sales Trust Module (if purchased) The Sales Trust Module allows you to record your Trust Account transactions, from upfront vendor marketing contributions to sales deposits from multiple buyers – all with full investment account tracking in a single entry database. Multiple Sales Trust Accounts are also available for agencies needing this additional flexibility for their sales transactions. Additionally, you can also access a comprehensive range of reports to help streamline the management of this important agency activity.	
Agentbox Academy eLearning Course: Complete the Agentbox Academy Sales Trust eLearning course and ensure you have completed the survey within it.	☐
Review Listings: Offers and contracts will not have come across from the Realestate.com.au listing import and will need to be re-uploaded on each listing card. Ensure all listings that you are holding funds for are re-uploaded with Vendor, Buyer and offer details entered on your listing cards. To add, locate your listing > Select the 'Offers/Contracts' tab, and submit.	☐
Schedule your Sales Trust Set Up Session: Discuss next steps with your Implementation Consultant within your Onboarding Walkthrough to schedule in your Zoom Sales Trust Set Up Session.	☐

Setting Up Additional Modules (contd)

DAYS 2 TO 7

TASK	DONE
Prospector Modules Premium Clients will have access to additional modules as a part of their Agentbox Subscription. These modules must be enabled and configured prior to use by the broader office team. An Agentbox Training Consultant is around to help you get them set up, or you can get started on your own via the Manage Subscription option (top right hand corner drop down). All instructions are in our User Manuals or in the eLearning Course Getting Started with Premium.	
Agentbox Proposals: Activate and then customize your Proposals Templates and Themes to convey your Agencies unique services and branding.	☐
Auto-Responder: Activate, brand and enable the Auto-responder tool for your office. Never miss an enquiry with an automated first response for Tenants and Buyers.	☐
Prospector: Activate Prospector, then configure your Core Areas, provide permission to your Staff and connect Core Logic.	☐
Debit & Credits Commission Module (if purchased) Create and manage Agent Net Payment Reports! The Debit & Credit Commission Module makes commission management easier by creating unique commission profiles for each agent and assists in managing recurring income and expenses. Include standard gross commission deductions, or even set the agent vs office split as a fixed percentage, or tiered commission structures/profiles for staff.	
Debit & Credits Commission Module: As part of your system launch, your Debits & Credits will be configured to an open payment cycle option period and will allow for recurring Debits & Credits by your Project Coordinator, unless advised otherwise. Reporting period commencement will default to the month that your system has launched. Should you prefer alternative configuration, please CLICK HERE to complete the survey with your unique office information, prior to your system launch.	☐
Set Up the Agents Commission Profiles: Create your unique Commission Profiles for each staff member. This will be the default commission values for your agents, when managing commissions, per listing. To set up, access your Staff Cards > 'Targets' tab > Scroll to the bottom, and set up.	☐
Integrate Xero (if applicable): In addition to the above, the Debit & Credit Commissions Module integrates with Xero, so be sure to advise your Project Coordinator if you would like this turned on.	☐

Onboarding FAQs

Q: Who should be attending my 60-minute Onboarding Walkthrough Sey Up Session via Zoom?	**A:** We recommend only your Master Users/ Agentbox Champion/Office decision-makers only (Up to 3 Staff Members).
Q: What are the top priority items to complete once live?	**A:** We recommend referring to the above Onboarding Checklist items.
Q: Why aren't my Realestate.com.au leads being received into the Leads Capture Module?	**A:** It sounds like you have not included your unique capture email address on your REA Agent Admin Agent Profiles.
Q: Some of my portals aren't yet connected (such as Domain.com.au) to my Agentbox system, what should I do?	**A:** Agentbox is ready to connect from your Go-Live date! Reach out to your point of contact at that website, advise them that you are now using Agentbox. They will need to send a Portal Feed Request to support@agentbox.com.au.
Q: Will compliance documents also be imported through the Realestate.com.au listing import?	**A:** No, this will not be imported from the Realestate.com.au listing import, and so we highly recommend re-uploading compliance documents to listings as soon as possible.
Q: How do I provide Agentbox logins?	**A:** Locate the Staff Card > Select the Access tab > Select the appropriate role from the drop-down, and review Permissions, per Staff Card.
Q: How can I access my eLearning training?	**A:** Through Agentbox Academy – click here to learn more about your new Agentbox system.
Q: Why aren't my listings feeding to my websites?	**A:** Ensure you have ticked your Portal Exports. If delays, please contact support@agentbox.com.au.
Q: How do I set up my Sales Trust Module?	**A:** Complete your Sales Trust Course in Agentbox Academy. Re-upload all offers on listings within Agentbox that you are holding funds for. Notify your Implementation Consultant training@agentbox.com.au to schedule in your Sales Trust Zoom Set Up session.
Q: I have recently launched with Agentbox, and would like to consider purchasing additional training – who should I contact?	**A:** Contact your Implementation Consultant at training@agentbox.com.au. Our team will discuss your training solutions to assist with getting the most out of your Agentbox system
Q: I have an additional question - how do I contact my Project Coordinator?	**A:** onboarding@agentbox.com.au

Agentbox Consultation

WEEKS 2 TO 3

The team at Agentbox provide the following personalised training sessions as part of your onboarding package. Your Training Consultant will coordinate the below sessions within your onboarding plan.

These sessions will help you gain confidence early and allow you to ask role-specific questions. Agencies who have taken a proactive approach to upskilling staff have found they have benefited immediately.

Additional training sessions can also be purchased to suit your needs.

Agentbox Onboarding		
Training Topic Summary	**Accelerate Clients** 4 x 1-hour sessions	**Premium Clients** 8 x 1-hour sessions
Onboarding Walk Through	Master Users / Decision Makers	Master Users / Decision Makers
Agentbox Mobile App	Agents & Admin	Agents & Admin
Properties, Appraisals and the Pipeline	Agents & Admin	Agents & Admin
Listings and the Sales Process	Admin	Admin
Client Management & Vendor Report	–	Agents & Admin
Module Activation Session	–	Agents & Admin
Prospector	–	Agents & Admin
Agentbox Proposals	–	Agents & Admin