New Agent Onboarding Checlist for Brokers

When a new agent joins your brokerage, here are some steps they should take to optimize the use of their MLS subscription.

- ☐ Sign Up for **_Required MLS Classes_** within 60 Days
    - o Starting out Stellar
    - o MLS Basic
    - o MLS Compliance 101
    - o MLS Adding & Editing Listings (if agent will be inputting their own listings into the MLS system)

- ☐ Configure **_Portal Notification Settings_** – Go to Matrix Settings by clicking on agent's name in the top-right corner of the screen, and then settings. Here, agents can set up "Portal Notification Settings" to be notified by email, text or daily email summary when they email listings to a customer through Matrix and that customer visits their portal to view the listing, save a favorite, save a possibility, discard a listing, or leave a note.
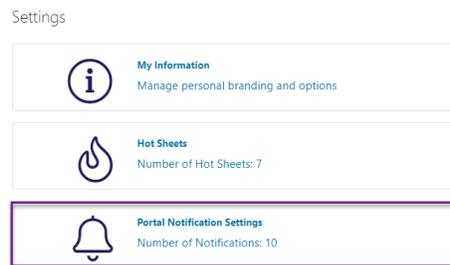
This video gives an overview of the Customer Portal and Notification Settings.

- ☐ Add **_Photo to Matrix Directory_** - All agents have a profile picture in Matrix, which goes out to the MLS Agent Directory. To add or edit a profile picture, go to the Add/Edit tab and select "Edit Agent Roster. https://vimeo.com/351232678
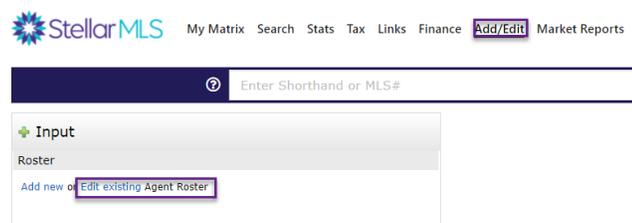
Under "Member Mls ID to modify, type in agent ID and click "Modify". The agent is then able to upload or change a photo.
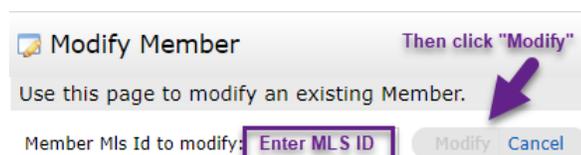
☐ Set up **Branding and Personalization in Matrix** – Go to Matrix Setting by clicking on agent's name in the top-right corner of the screen, and then settings. The My Information section offers several personalization options that can be configured. These are described below, and also highlighted in this video.
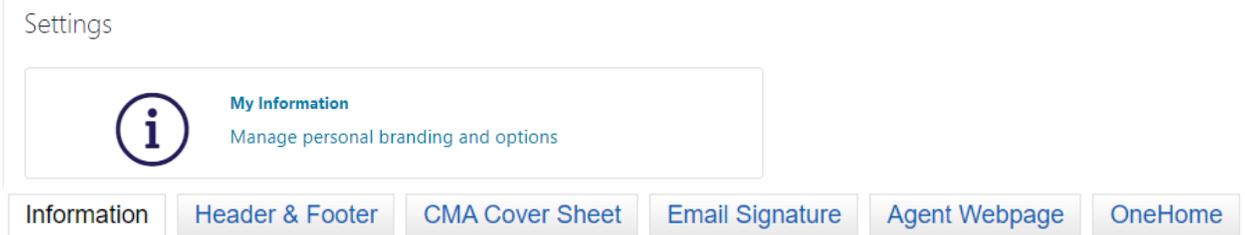
- o *Information* – Agent's name, title, phone, office, email, web site, tagline, etc. can be updated here. Please note that if their name or contact information ever change, they must contact their local Realtor® board in addition to changing it here. The information in this section is only what shows up in the customer portal, not on listings and reports.
- o *Header & Footer* – Create a header to show up in the customer portal and on their agent web page. Select from a variety of default headers or upload a custom header. Upload a photo to appear in header. Choose up to five lines of text to appear in header, and set the background color, text color, and transparency level of the background color. Then choose whether or not to include a footer, and if so, choose up to four lines of information to include in the footer along with the footer color scheme.
- o *CMA Cover Sheet* – Create a cover sheet for when you develop CMAs through the Matrix CMA wizard. Upload a photo and add contact information.
- o *Email Signature* – Create an email signature for when agent emails listings out through Matrix. If the agent would like to add a photo to their email signature, click the image icon. They can either select the image from their CMA Cover Sheet tab, or link to the URL of an image hosted on an external site.
- o *Agent Webpage* – A free, basic web page is available through Matrix. To configure this, go to the My Matrix tab and select Information. Then go to the Agent Web Page tab. Agents may want to set up their Header and Portal Profile first. Under the Agent Web Page tab, agents will have the opportunity to enable their web page, see the URL, add home page content, set up their search form preferences, and include a sign-up sheet to the page. Note that an agent can forward a domain that you own to this web site.
- o *OneHome* – Upload photo and contact information to appear in consumer-facing OneHome portal. Update the greeting that appears in the OneHome Agent Profile.

☐ Complete **Agent Profile** - Stellar MLS offers many products to its subscribers, driving several different areas of one's real estate business. This can be exciting, but also overwhelming to new agents. As part of our commitment to create a curated customer journey, Stellar MLS has recently launched Agent Profiles. By having agents complete a profile letting us know about their business needs, we are able to better target our

marketing and communications to those agents, sending them details on the products and updates that will best serve their needs!

Profiles can be accessed by logging into Stellar Central at stellarmls.com, click "My MLS Account" from the navigation menu, and then "My Profile".

☐ Set up *Lead Generation Tools -* if an agent plans to use tools such as Remine, Cloud CMA or MLS Touch, they should add their branding to these products.
  o For Remine, the agent can click on their name on the side menu to access their settings. Here they can add their photo and create a URL for the consumer-facing site.

  o For Cloud CMA, after creating an account, the agent should click on their initials in the top corner. Here, they can access all of their account settings, including their profile, contact info, and Custom Pages.

  o For the MLS Touch app, agents should download the app and login with their MLS credentials. Then, from the "More" menu option on the bottom, go to "Brand and Share" to customize branding and access a link to share with consumers.

  o For Homesnap, agents should download the app and create an account. Under the "Me" tab, they can add a photo. They can also access the link to their branded consumer-facing site here.