

First 30 days – To Do List

- _____ Complete and sign onboarding paperwork that Liz Purdue sends you when you join KW Ballantyne. The membership applications to join Canopy Realtor Association and Canopy MLS are included. Once completed, your applications will be emailed by Liz to Canopy Membership at the same time she submits your NCREC activation/affiliation online.
 - _____ Confirm with Canopy Membership 704-940-3110
 - _____ Your payment for CRA fees: \$250 application plus \$520 annual fees
 - _____ Your payment to join Canopy MLS: application fee \$250 and \$165 per quarter, prorated
 - _____ Your payment to MLS for SupraKey: \$30 per quarter for ekey access on phone
 - _____ Schedule class dates and times
 - _____ Canopy Realtor Association Orientation (Code of Ethics course) MUST complete within 60 days of joining.
 - _____ Canopy MLS/Matrix Orientation plus two Matrix online classes MUST complete within 30 days of joining.
 - _____ Give MLS number to MCA, Lynn Davis or Liz Purdue, Ass't MCA
 - _____ If transferring from another local firm, complete Canopy transfer form with payment information.
 - _____ Confirm transfer fee payment
 - _____ If you are SC licensed, you must go to www.LLRonline.com and transfer your license
 - _____ If you have listings, arrange with BIC to have listings transferred – must complete within 5 days
 - _____ Attend Team Meetings (2nd and 4th Tuesdays, 11:00am - Noon) for most up-to-date market center info
Zoom link is posted on www.kwbresources.com – office calendar
 - _____ Learn COMMAND and DocuSign
 - _____ Attend tech classes – posted on www.kwbresources.com – office calendar
 - _____ Start setting up your database in COMMAND (Contacts)
 - _____ Practice and become familiar with accessing COMMAND - agent.KW.com
 - _____ Learn how to access forms for printing and/or online for eSignatures in DocuSign
- NOTE:** Transaction Partner (T-Groups), IGNITE and COMMAND training participation is required for all new agents.
- _____ Attend T-Group weekly meetings – 16 weeks – you may select day & time to fit your schedule (Keep Log)
 - _____ Attend IGNITE – schedule is posted on www.kwbresources.com – office calendar

Reminders:

- _____ Turn in your current photo to Liz
- _____ Set-up message on your mobile phone voice mail/ test the system
- _____ Order business cards, name badges and signs (yard signs, riders, open house, etc.); proofs must be approved by BIC
- _____ Order and send out announcement cards to sphere of influence (SOI)
- _____ Ask Liz to add print drivers to your laptop if you plan to print items in the office
- _____ Verify accuracy of your name and number on agent roster
- _____ Test your KW email address; add e-signature
- _____ View SLM videos for training
- _____ Attend weekly Tech/COMMAND classes with JuLeah Designs
- _____ If you want desk/office location - contact Lynn Davis, MCA, for approval

KNOW YOUR NUMBERS...

- Main office phone number: 704.887.6600
 - Address: 14045 Ballantyne Corporate Place, Ste 500, Charlotte, NC 28277
- Our Firm License (NC Real Estate Commission) is: #C13291
 - My Broker-in-Charge NC License is #223937
- My NC Real Estate License number is: _____
- Our Office number (SC Real Estate Commission) is: #10902
 - My Broker-in-Charge SC License is #24930
- My SC License number is: _____
- Our Firm's Federal Tax ID is: #16-1651586
- Our NAID number for HUD bids is KLLRWL1586 – must register as a bidder to place offer bids
- The website of Keller Williams International is: www.kw.com
- Your Associate ID is the last 4 digits of your social security number
- Our Keller Williams Market Center ID number is #350
- To access COMMAND, go to agent.kw.com

- Your password for the copiers (B&W and color) and all other office equipment is the last four digits of your social security number.
- Phone number to membership services at Canopy Realtor Association and Canopy MLS is 704-940-3110 or email is membership@carolinahome.com
- Our Canopy MLS office ID is #9149 – BIC is member participant, #55454. Agent is a “subscriber”.
 - My MLS ID is _____

- Phone number for NC Real Estate Commission is 919-875-3700.
- The NC Commission website is www.ncrec.gov to renew or check license status, including CE and post-licensing hours.
- NC Association of Realtors website is www.ncrealtors.org to download and print blank forms, if needed.
- Phone number for SC Real Estate Commission is 803-896-4400
- SC Real Estate Commission website is www.LLRonline.com to renew, transfer or check license status or apply for new license.
- SC Association of Realtors website is www.screaltors.org to download and print blank forms, if needed. (Must be a member of SC Realtors Assoc for access.)
- National Association of Realtors (NAR) www.nar.realtor
- My NRDS # - _____ (ID in NAR's national database)
 - Wi-fi code is Bamc350!