ENTER ASSOCIATES CHECKLIST

DONE	TASK	TOOLS	VIDEO
	REVIEW THE CAP MANAGEMENT TOOL • With the OP and TL, review the Cap Management tool if the associate is a consistent capper, and determine the associate’s company dollar anniversary date.	WinMORE, Cap Management Tool	

	PRINT A BINDING SPONSORSHIP AGREEMENT
	• In WinMORE, go to Print > Associate Reports > Binding Sponsorship Agreement. This must be printed at the time the associate joins.
	• Learn more about sponsorship and the profit share system here.
	  ○ Learn how profit share is calculated
	  ○ How the tree grows (choosing a sponsor)
		WinMORE	

	GATHER INFORMATION
	The following items must be collected **before** an associate can be entered into WinMORE:
	• Associate’s Real Estate License (if entering an unlicensed individual, this is not required)
	• Binding Sponsorship Agreement (fully executed by the associate)
	  ○ **Note**: If the associate is transferring from another Market Center, a new Binding Sponsorship Agreement is not needed.
	• Direct Deposit Authorization form for Profit Share deposits
	• Billing agreement for agent’s monthly billing
	  ○ **Note**: Do not keep full credit card numbers on file in the Market Center.
	• W9 for the associate
	• W9 for associate’s company if they have one
	• Independent Contractor Agreement
	• Policy & Guidelines Acknowledgement Page Signed		

	ENTER ASSOCIATE INTO WINMORE • Use the Associate Entry Decision Tree to determine how to enter the associate into WinMORE accurately.	WinMORE	

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DONE	TASK	TOOLS	VIDEO
	ENTER ASSOCIATE'S COMPANY INTO WINMORE • If an associate operates under a business entity and would like their commission checks and/or profit share payable to that company, collect a W9 (or Tax ID info in Canada) and enter the company into WinMORE.	WinMORE	
	ENTER CUSTOMER CARD IN ACCOUNTING SYSTEM • Enter a customer card for the associate. ○ Remember to include a valid email address. • If the associate operates under a business entity, enter a card for the business.	AccountEdge Lone Wolf	

	ADD ASSOCIATE TO YOUR MONTHLY BILLING SYSTEM
	• Update your AccountEdge or Lone Wolf monthly billing to include the new associate.
	• Create the associate's first bill. At a minimum, include the following:
	    ○ Associate Application Fee
	    ○ Consortium Fee
	    ○ eEdge Fee
			AE Connect

	ADD THE ASSOCIATE TO THE TEAM ADMINISTRATION TOOL (if they are on a team)
	• From WinMORE, go to Enter > Teams Administration Tool.
	• Have the associate or rainmaker fill out a Team Change Form similar to this example.
	    ○ Enter a new team
	    ○ Add an associate to a team		

	ENTER THE ASSOCIATE'S MLS ID IN THE WHITE PAGES • From the home page of myKW, navigate to the Quick Links box and click on White Pages • Search for the associate's record and add their MLS ID (under their profile picture)		

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DONE	TASK	TOOLS	VIDEO
	HAVE A CONSULTATIVE CONVERSATION WITH THE ASSOCIATE • Set a meeting to have a goal-setting conversation with the associate. • Point the associate to training materials on KWConnect and Connect Live. • Direct the associate to Command Quick Start Guides found on www.kwconnect.com/tech-enabled-agent.		

Enter your market center specific tasks below:

DONE	TASK	TOOLS	VIDEO