

New Agent to Do List

Step 1 - Watch Training videos

Step 2 - Set up a Region: a region is a large demographic area to locate one or multiple offices. To set up a region click on the region field in the admin tab.

Example: Texas

Step 3 – Set up a District: a district is a smaller demographic area to locate one or multiple offices. To set up a district click on the district field in the admin tab.

Example: Houston

Step 4 – Set up offices: To set up an office click on the office field in the admin tab, each office will require a name to identify each location.

Example: Main office, Downtown Office, Riverside Office

Step 5 – Adding Employees: To add an employee click on the employee field in the admin tab. You will be required to create a login and password for each employee. You will also be required to determine the access level for each employee.

Step 6 – Adding companies and Products: To add your companies click on the company field in the admin tab. After you enter a company with all the correct information you must click on the product field to the left of the company that you added, there you need to add all the products that you sell for that company.

Step 7 – Adding Fees: To add fees click on the fee field in the admin tab. Add all the variable fees that your agency charges.

Example: Agency Fee, Endorsement Fee, NSF Fee

Step 8 – Adding Sources: To add Sources click on the sources field in the Admin tab. Add all the variable sources for your agency.

Example: Walk in, Referral, Local Paper

Step 9 – Adding languages: To add Languages click on the Language field in the admin tab. Add all the languages that are spoken in the area that your office is located.

Step 10 – System Settings: In the system settings is where you can customize how you want certain things in the management system to run. Such as time tracking of employees or printing a second copy of the receipt for the office and more.

Step 11 – adding a company logo: To add a logo to your letters and receipt you must first have the logo saved somewhere on your computer. Then click on the company logos field in the admin page, and then click on the “add new logo” field. You are required to first give a description name, then click on the browse button to find it on your computer, once you have attach it click on the submit button and you’re done.

Step 12 – adding office photos: To add your office photos you must first have the photos saved somewhere on your computer. Then click on the office photos field in the admin page then click on the “add new photo” field. You are required to first give each photo a description name, then click on the browse button to find the photo on your computer, once you have attached the photo click on the submit button and you’re done.

Step 13 – adding receipt ads: To add a receipt ad you must first have the ad save somewhere on your computer. Then click on the receipt ad field in the admin tab then click on “add new receipt ad field. You are required to give each ad a description name so you can identify which is which when changing ads, then click on the browse button attach the ad and click on submit.

Step 14 – Editing letters and receipts: To edit a letter or receipt click on any one option in the letter Management area in the admin tab. Then click on edit this letter or receipt and after you have made the necessary changes simply click on the submit button.