



Agent Office Portal

2026 Checklist

TO DO

Item

TEAMS

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Are all of your teams set up correctly in AOP?

- Start date – **use Jan 1, 2026 moving forward, not 2025**
- Team name
- All TMs added

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Are all of your teams set up correctly in your back office with all of the team's transactions attributed to the team

Lonewolf offices

- Your Lonewolf system must mirror the AOP team set up
 - Lonewolf users will need to verify that all Teams are configured in Back Offices menu I.I.T, to agree with the Team Relationships in MaxCentre
 - When adding or editing a Team in Back Office, a Team Start Date is required – **use Jan 1, 2026 moving forward, not 2025**

The screenshot shows the 'Edit Teams/Assistants' window. At the top, there's a title bar 'Edit Teams/Assistants [1.1.7]'. Below it, a tabbed interface with 'List' and 'Details' tabs. The 'List' tab is active, showing a table titled 'Teams/Staff Leaders For: Team Member'. The table has columns: Number, Team/Staff Leader, Status, Start Date, and End Date. One row is visible: TL1, Lead, Team, Sales Agent, 07/01/2023, Ongoing/Current. Below the table, there's a dialog box titled 'Editing Team/Staff Leader'. It has fields for Team/Staff Leader (TL1), Start Date (07/01/2023), and End Date. There's a checkbox for 'Ongoing/Current Team' which is checked. Below the dialog box, there are buttons: Add, Edit, Delete, Store, Print, Cancel, and Exit. At the bottom right, there are status indicators: INS, NUM, and CAPS.



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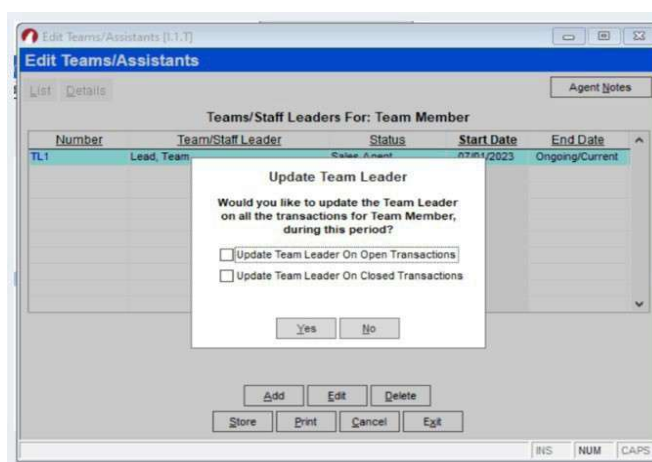
TO DO

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TEAMS – con't

Lonewolf offices

- The Start Date is crucial for the software to determine the Trade Records that need to be updated in the following notice



- Users should be choosing to update the Team Leader on both the **Open AND Closed Transactions – DO NOT ADD Closed Transactions if closed in 2025 – very important!**
- Back Office will then take the Start Date of the Team that was recently input, and compare the Closing Dates of Transactions where the Team Member was the active Agent
- If the Closing Date is after the Start Date of the Team, the Team Leader will automatically be assigned as the Leader for the active Team Member on the Transaction**
- Fortunately, updating the Team Leader on Closed Transactions from the Screenshot above does NOT require the affected Transactions to be uploaded to MaxCentre in 2.M.8.4
- As long as the users do not return to the affected Transactions in 2.1 and apply changes to them, the records will not be reuploaded, nor will this result in any duplication
 - If you do experience duplication of transactions, please contact your membership and billing coordinator.



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TEAMS – con't

Prior TM Closed Transactions that were not attached to the team and need to be attached to the team

Lonewolf offices

- For each closed Transaction for the current year, Users will need to navigate to the Agent Info Tab of menu option 2.1
- Choose to Edit the Team Member that is assigned to the Transaction, and apply to the Team Leader
- After applying this change, the Transaction will be stored. This process will require the Transaction to be uploaded, for the next transmission made to MaxCentre via 2.M.8.4
- **DO NOT** add any 2025 closed transactions to the team.
- This has been completed and will result in duplication

If any of the above is not set up correctly, the team will not have all of their team transactions attributed to the team, and that will negatively impact on the monthly Top Producer.Rankings, TL Club Levels, and Year End Awards



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TEAMS – con't

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Are you reporting Awards commission on the appropriate Team Leader or Team Member for awards purposes

Lonewolf offices

- Lonewolf offices can use the awards Commission override in 2.1 under the Agent Info Tab and edit the Award Amount for each agent to adjust the commission allocation within the team

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Transactions from an Individual status agent must not be attributed to any team

- If commissions are to be allocated towards the team, the Individual must be added to the Team as a TM in AOP and in back office

Team Members will receive the amount of commissions reported on them each month attributed towards their Club Level. If you wish to re-allocate award commissions within the team, please implement this override as applicable as **the region is no longer be able to re-allocate team commissions on your behalf for 2026** since you are reporting at the transaction level



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ROSTERS



Please review your STAFF rosters to ensure we are up to date with all of your office staff members

- Add any new staff so they have proper access to AOP
- Terminate any staff that is no longer with the office

Please refrain from using a log in from a former staff member. Take this opportunity to add new staff so that they have the proper access and their unique log in to MAX/Centre

INVOICE PREVIEWS



It is important that you review your invoice PRIOR to finalizing yourself or prior to the system auto finalizing on the evening of the 10th

- This is your opportunity to contact the region to make any changes that affect the current month's invoice (incorrect bill plans, missed incentive, etc)
- If your inquiry requires Lonewolf support, please allow enough time before the 10th of the month to contact them and get resolved prior to the 10th
- The region will no longer provide credits to previously submitted invoices due to lack of identifying an issue during the current invoice period

The invoice preview that is emailed to you on the 1st of the month DOES NOT INCLUDE any commissions that will be uploaded between the 1st and the 10th of the month. Once commissions are uploaded, applicable broker fees will be added and your invoice amount could change



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MAC FEES

fyi

- Former Quota Deficiency Fees (QDF) are now referred to as Minimum Agent Count (MAC) fees
- MAC fees are assigned at the office level (or office grouping) and appear on your invoice as
 - MAC – Ad Fund Fees
 - \$125 x number of agents below MAC as of the last day of the previous month
 - MAC – Continuing Franchise Fees
 - \$187 x number of agents below MAC as of the last day of the previous month

PAYMENTS



- Payment is due on the 10th of the month. Avoid late fees by submitting payment by this date
- There will be a 10% late fee automatically assigned by the system to the monthly amount outstanding
- Ensure your payment is processed promptly by paying via Pay Now in AOP or signing up for Auto Pay. Contact membershipandbilling@remax.ca for more information