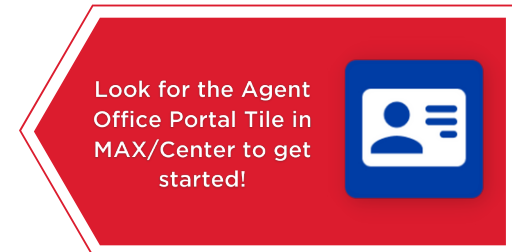




How to Create + Manage Teams in the Agent Office Portal

The Agent and Office Portal gives you control over the organizational and financial aspects of your business! Follow these steps to easily create new teams or manage existing teams inside of the Agent Office Portal.



1. Log into MAX/Center using your remax.net username and password
2. Navigate to the Agent Office Portal Tile within your Apps & Tools
3. Once inside the Agent Office Portal, click on 'Maintain Teams' on the side navigation menu
4. If you have multiple offices within your brokerage, use the 'My Office(s)' dropdown menu to select which office you want to add a team to
5. Click 'Create/Update Team'
6. Use the options to select whether you want to:
 - [Create a New Team](#)
 - [Dissolve a Team](#)
 - [Update a Team Name](#)
 - [Switch a Team Leader to another Team Member](#)
 - or [Add/Remove Team Members from a team](#)

My Account My Office(s) RE/MAX Grand - 100426212 - Baraboo

Add/Update Team Information

Select an Option below:

- Create a New Team
- Dissolve a Team
- Update a Team Name
- Switch Team Leader with another Team Member
- Add or Remove Team Members

Return to Roster

Continue instructions on next page

Create a New Team

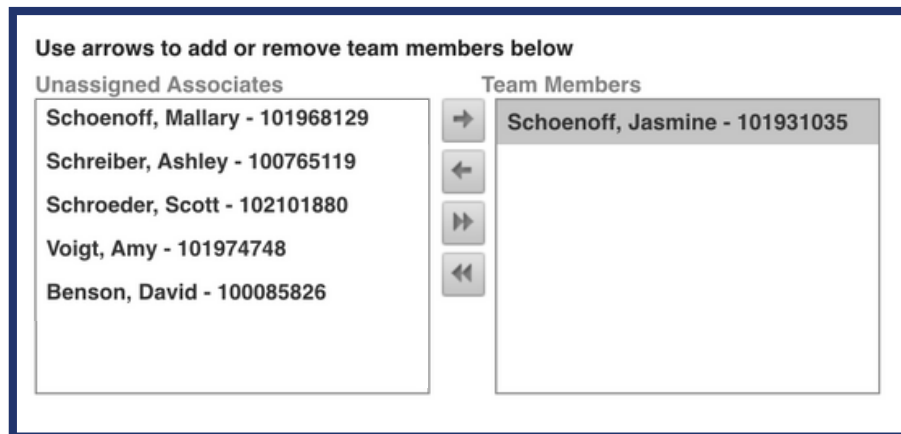
1. Select 'Create a New Team'
2. Input the chosen team name into the text box
3. Select a 'Team Start Date' — this date must be within the current billing period
4. Use the dropdown menu to select a Team Lead
5. Select the preferred bill plan — the options will vary depending on your region
6. Select an agent within the 'Unassigned Associates' box that you would like to add to the team and then use the arrows to move them into the 'Team Members' box



Use arrows to add or remove team members below

Unassigned Associates		Team Members
Schoenoff, Jasmine - 101931035	→	
Schoenoff, Mallary - 101968129	←	
Schreiber, Ashley - 100765119	→	
Schroeder, Scott - 102101880		
Voigt, Amy - 101974748		
Benson, David - 100085826		

A red arrow points to the 'Schoenoff, Jasmine - 101931035' entry in the 'Unassigned Associates' list. A red box highlights the right-pointing arrow between this entry and the 'Team Members' box.



Use arrows to add or remove team members below

Unassigned Associates		Team Members
Schoenoff, Mallary - 101968129	→	Schoenoff, Jasmine - 101931035
Schreiber, Ashley - 100765119	←	
Schroeder, Scott - 102101880	→	
Voigt, Amy - 101974748		
Benson, David - 100085826	←	

The 'Schoenoff, Jasmine - 101931035' entry has been moved from the 'Unassigned Associates' list to the 'Team Members' box. The right-pointing arrow between the two boxes is now highlighted with a red box.

7. Use the 'Add an Agent/Associate' or 'Remove an Agent/Associate' links to quickly add or remove an agent that does not appear within the 'Unassigned Associates' box
8. Click 'Submit' to save your new team

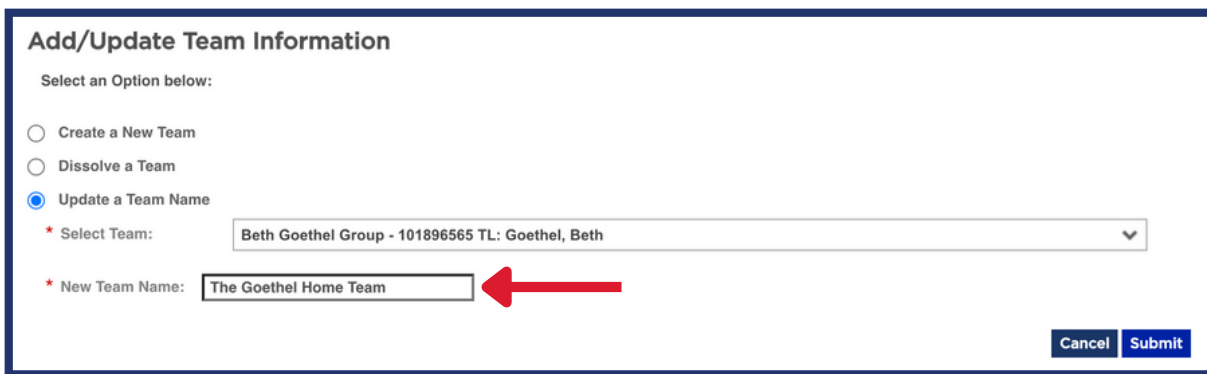
Continue instructions on next page

Disslove a Team

1. Select 'Dissolve a Team'
2. Use the dropdown menu to select the team you would like to dissolve
3. Update the effective date you would like this change to be made — this date must be within the current billing period
4. Click 'Submit' to save your change

Update a Team Name

1. Select 'Update a Team Name'
2. Use the dropdown menu to select the team name you would like to change
3. Input the new team name within the 'New Team Name' textbox
4. Click 'Submit' to save your change



Add/Update Team Information

Select an Option below:

Create a New Team

Dissolve a Team

Update a Team Name

* Select Team:

* New Team Name:

Switch Team Leader with Another Team Member

1. Select 'Switch Team Leader with Another Team Member'
2. Use the dropdown menu to select the team you would like to make changes to
3. Use the 'New Team Lead' dropdown menu to select which agent in your office will be taking on the role of New Team Lead
4. Update the effective date you would like this change to be made — this date must be within the current billing period
5. Click 'Submit' to save your change

Continue instructions on next page

Add or Remove Team Members

1. Select 'Add or Remove Team Members'
2. Use the 'Select Team' dropdown menu to select the team that you would like to make changes to
3. Update the effective date you would like this change to be made — this date must be within the current billing period
4. To add an agent to the team, select one of the agents listed in the 'Unassigned Associates' box; then use the arrows to move them into the 'Team Members' box
5. To remove an agent from the team, select one of the agents listed in the 'Team Members' box; then use the arrows to move them back into the 'Unassigned Associates' box

Use arrows to add or remove team members below

Unassigned Associates		Team Members
Benson, David - 100085826	→	Teasdale, Cahrone - 102209896
Schoenoff, Jasmine - 101931035	←	
Schoenoff, Mallary - 101968129	→	
Schreiber, Ashley - 100765119	←	
Schroeder, Scott - 102101880		
Voigt, Amy - 101974748		

Use arrows to add or remove team members below

Unassigned Associates		Team Members
Benson, David - 100085826	→	
Schoenoff, Jasmine - 101931035	←	
Schoenoff, Mallary - 101968129	→	
Schreiber, Ashley - 100765119	←	
Schroeder, Scott - 102101880		
Voigt, Amy - 101974748		
Teasdale, Cahrone - 102209896		

6. Use the 'Add an Agent/Associate' or 'Remove an Agent/Associate' to quickly add or remove an agent that does not appear within the 'Unassigned Associates' box
7. Click 'Submit' to save your changes



If you have any questions about changing the status of agents or staff members in the Agent Office Portal, please reach out to product support