



How to Add New Agents + Staff Inside of Agent Office Portal

Whether you just added a new agent to your office or recently hired a new staff member—follow these steps to easily add them to your office roster 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 Roster' on the side navigation menu
4. Click 'Add New/Transfer/Reactivate Individual' to add a new individual to your office
5. If you have multiple offices in your brokerage, use the 'My Office(s)' dropdown to select which office you want to add the individual to
6. Use the text boxes to add information about your new agent or staff member including First and Last Name, Country, and State; the Agent Office Portal will search for that constituent within the database

Look for the Agent Office Portal Tile in MAX/Center to get started!



*** Required**
Please provide the following information for the new Affiliate or Staff member:

* First Name:

* Last Name:

* Country:

State:

We have found a possible match. Review the list and select the individual that matches to reactivate or transfer to your Office. Or select the option to Add a new individual.

Select	Name	Role	Company	Location	License	Status
<input checked="" type="checkbox"/>	Benson, David	ASSOCIATE	Grand, RE/MAX	144 4th Ave Ste 3		Active
<input type="checkbox"/>	The individual being added is not listed. Add a new individual.					

7. If the individual is already or was already a member of the network they will appear in the list at the bottom of the screen. Ensure the agent information listed is correct and click 'Continue'

Continue instructions on next page

8. The Agent Office Portal will now pull in that agent's information from the RE/MAX Membership Database; review the information and make changes where necessary
9. Once you are sure the information listed is correct, click 'Save' to save the new individual
10. If the Agent Office Portal cannot find that individual, you can add more information manually by clicking on 'Add Individual Details'

The screenshot shows a web interface with a navigation bar at the top containing 'My Account', 'My Office(s)', and 'RE/MAX Grand - 100426212 - Baraboo'. Below the navigation bar, there is a section titled '* Required' with the instruction: 'Please provide the following information for the new Affiliate or Staff member:'. The form contains the following fields: 'First Name' (Peter), 'Last Name' (Parker), 'Country' (United States), and 'State' (New York). A blue 'Check' button is located to the right of the form. Below the form, a message reads: 'We did not find a match to the information provided. Would you like to add details about this constituent?'. A red arrow points to a button labeled 'Add Individual Details'.

11. Work through the form to add information about your new agent or staff member; the form will change depending on which type of individual you are adding

The example listed below is of a sample New Agent form.

Contact Information

Add contact information including their name, gender, date of birth, title, preferred phone number, and email address. The information included here will feed into their MAX/Profile and by extension, their remax.com agent bio, RE/MAX Agent Website, and more.

The screenshot shows a web form titled '* Required' with the following fields: 'Preferred Name/Nickname' (Pete), 'First Name' (Peter), 'Last Name' (Parker), 'Maiden Name' (empty), 'Gender' (Female and Male radio buttons, with Male selected), 'Date of Birth' (10/8/1985), 'Title' (Associate), 'Preferred Phone' (with a dropdown menu, parentheses, hyphen, and EXT fields), and 'Primary Email Address' (pparker@remax.net).

Continue instructions on next page

License Information

If adding a new agent, include their sales or broker license information — including country, state, license number, and RE/MAX join date.

* First Year License:	<input type="text" value="2011"/>		
* License Information (Must provide at least one of the following):			
	Country	State	License Number
Sales License:	<input type="text" value="United States"/>	<input type="text" value="New York"/>	<input type="text" value="1111111111"/>
Broker License:	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>
* RE/MAX Join Date:	<input type="text" value="7/14/2022"/>		

Additional Information

Use these boxes to add any prior affiliations, real estate specialties, and the languages they speak. This information is useful for consumers and other agents looking to send referrals to agents that speak specific languages or specialize in a specific type of real estate.

* Prior Affiliations:			
	Country	State	Affiliation
	<input type="text" value="United States"/>	<input type="text" value="Vermont"/>	<input type="text" value="Other"/>
* Specialties:			
Select a Specialty Type, one primary Specialty and a Sub-Specialty (if applicable):			
Type	Specialty	Subspecialty	
<input type="text" value="Residential"/>	<input type="text" value="New Constructor"/>	<input type="text" value="Select"/>	
* Language:			
Priority	Language		
* 1	<input type="text" value="English"/>		
2	<input type="text" value="Spanish"/>		
3	<input type="text" value="Select"/>		

Team Status + Bill Plan

If the agent is on a team, easily add that agent to their team by selecting Team Member and choosing which team they have joined. You will also be able to select a preferred bill plan using the Select Bill Plan dropdown. These options vary based on your region.

* Team Status	<input checked="" type="radio"/> Individual	<input type="radio"/> Team Leader	<input type="radio"/> Team Member
Bill Plan Instructions			
* Select Bill Plan:	<input type="text" value="Select"/>		

Continue instructions on next page

12. At the end of the form, you will have the option to add comments; this is where you can include any additional information about that individual that you would like to have on file
13. Once you have finished adding the new individual's information, have reviewed it for accuracy, and reviewed the Terms & Conditions, click 'Save'



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