Agent & Office Portal

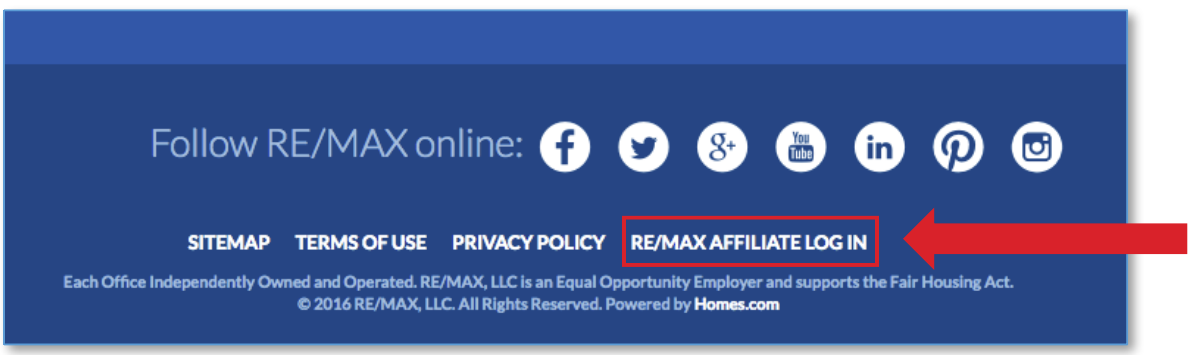
Office Management Guide

Agent & Office Portal
Office Management Guide

Table of Contents

Accessing the Agent & Office Portal
Available in MAX/Center

1. Go to **www.remax.com** and click on **RE/MAX Affiliate Log In,** found at the very bottom of the home page. Use your **@remax.net** email address and password to log in to MAX/Center.



2. Click on the **My Account** app to access the portal.

Profile Management

Similar to your Individual Profile, complete your Office Profile to help attract additional business.

Additionally, you have the ability to update Individual Profiles on your agents' behalf.

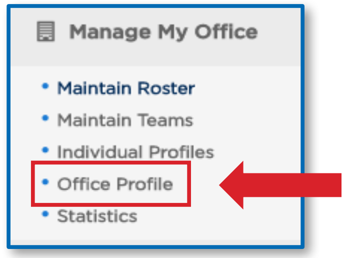
In this section....

- Updating Your Office Profile
- Updating Individual Profiles

Agent & Office Portal
Profile Management

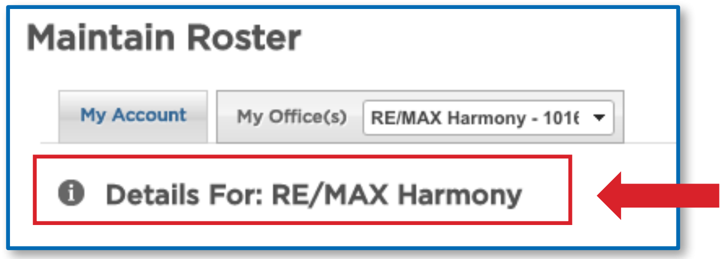
Updating Your Office Profile

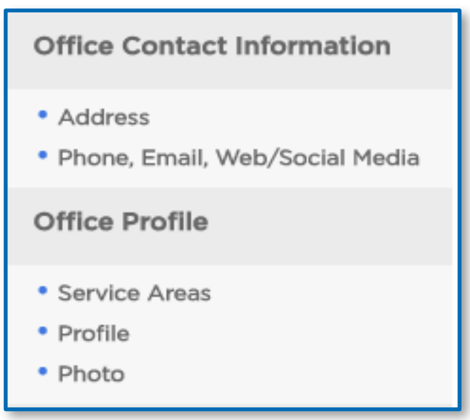
1. Select **Office Profile** on the left hand menu.



2. Click on the **Details For: RE/MAX Office** link.

For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*





3. Edit and set primary Office **Phone Number**, **Email Address,** and **Web/Social Media** sites.

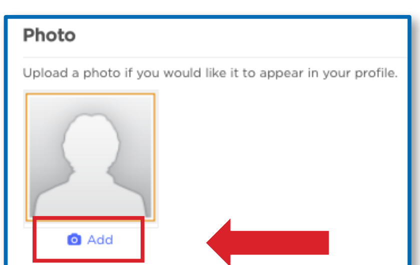
When adding your Office Email Address, select the **remax.net option from the **Email Location** dropdown. The email address can be **ANY** email address, not just a @remax.net address.*

4. Verify your Office **Service Areas**.

*****Service Areas** indicate the areas your office does business in when others search on remax.com or through the RE/MAX referral network. Office Service Areas are automatically allocated to agents within your office. To change, contact your regional representative.*

5. Select **Profile** on the left hand menu to update your Office **Community Awards** and local **Points of Interest**.

**Community Awards may include any non-RE/MAX award.*

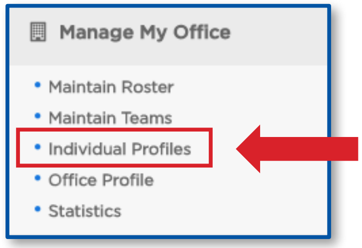


6. Upload your Office **Photo** by clicking the **Add** button. Select the file, click **Upload**, verify the preview and click **Save**.

**Consider using a photo of the office exterior, or your unique lobby décor to show off your location.*

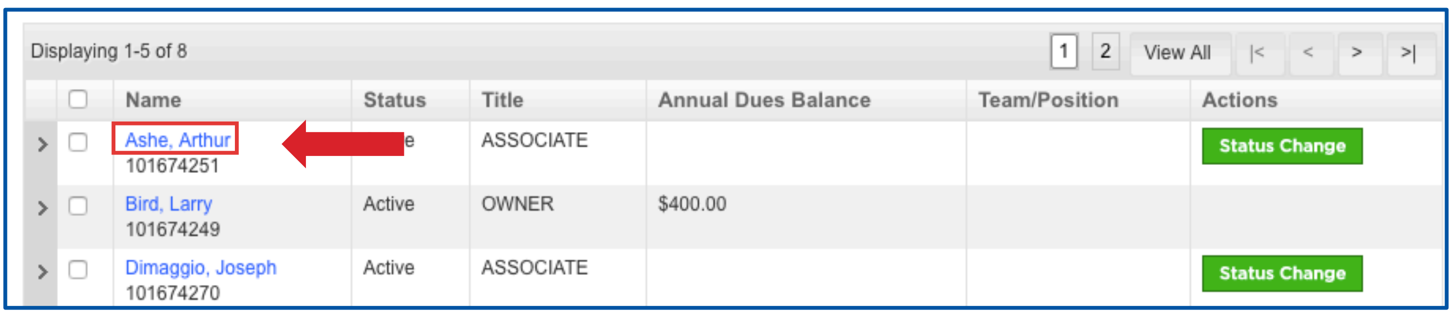
Updating Individual Profiles

1. Select **Individual Profiles** on the left hand menu.

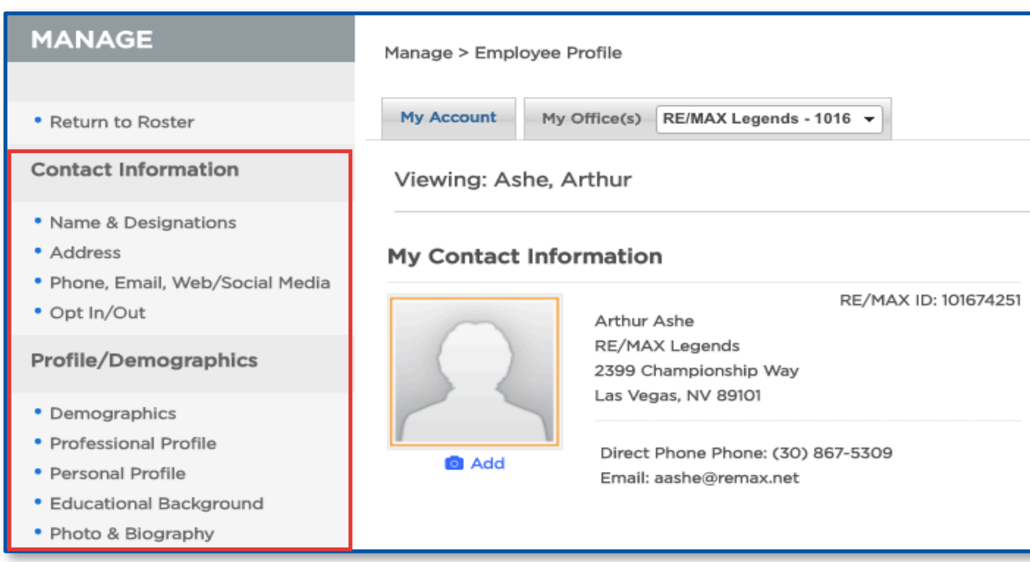


2. Click on the name of the associate whose profile you wish to edit from the roster.

For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*



3. In the Associate's profile you may edit **Contact Information** and **Profile and Demographics** on behalf of the Associate.



Refer to the **Agent & Office Portal: Updating your Profile guide to help navigate through the various editing options.*

Agent & Office Portal

Office Management Guide

Office Roster Management

Managing your office has never been easier! With the new Agent and Office Portal you can add new agents and make changes immediately.

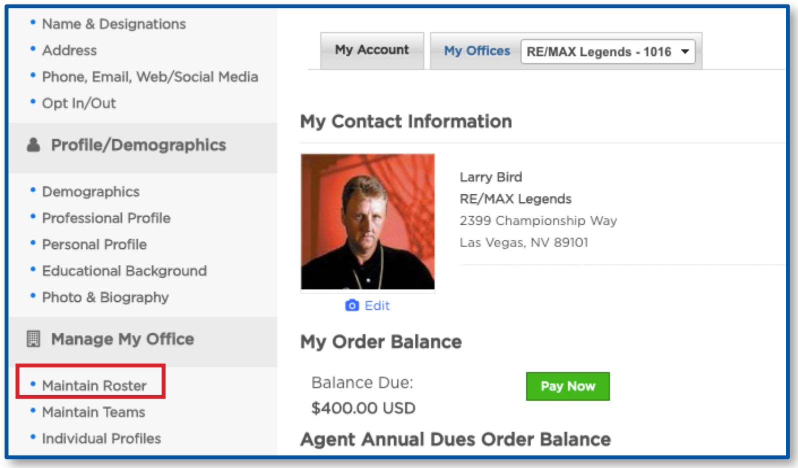
In this guide....

- Searching the Office Roster
- Adding an Affiliate
- Status Changes

Agent & Office Portal
Managing Your Office Roster

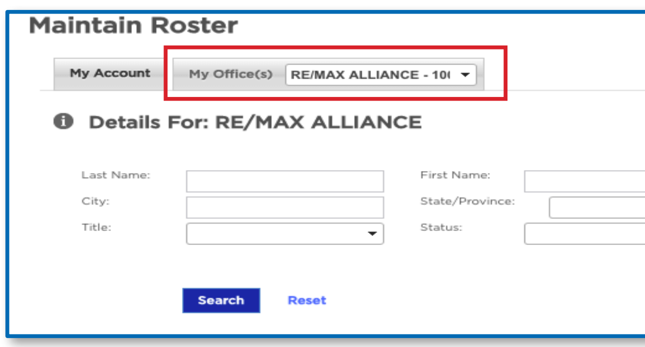
Searching Your Office Roster

1. Select **Maintain Roster** on the left hand menu.

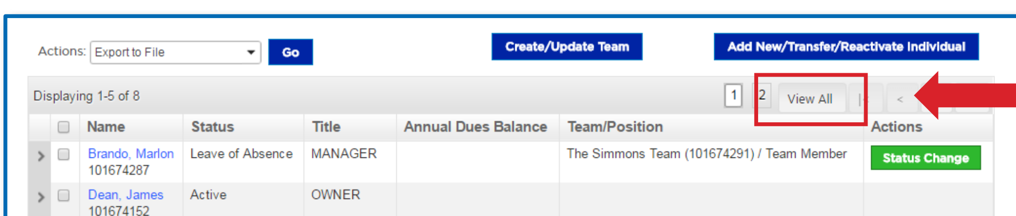


2. Here you can search for an agent within your Office by **Name, Title, Status, or Team.**

For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*



3. Search results return in groups of five by default. For easier viewing select **View All**. Click any column header to sort based on column content. You can also print or export your roster.

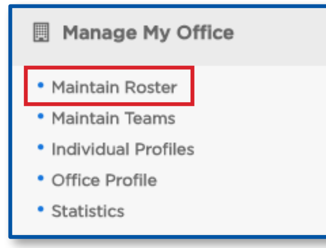


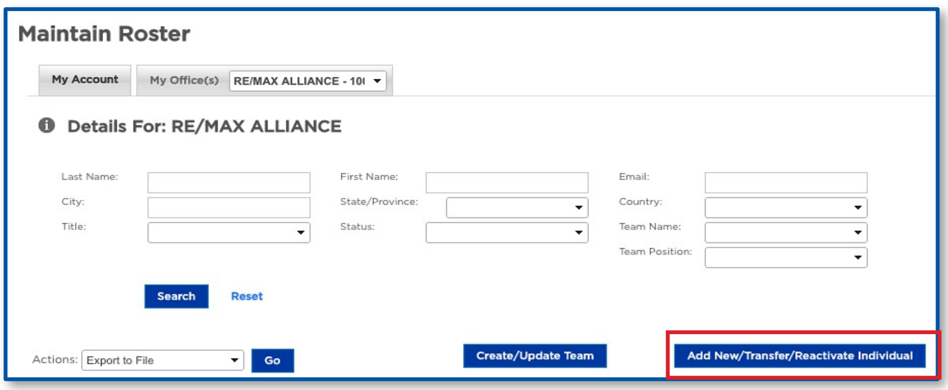
Agent & Office Portal
Managing Your Office Roster

Adding an Affiliate

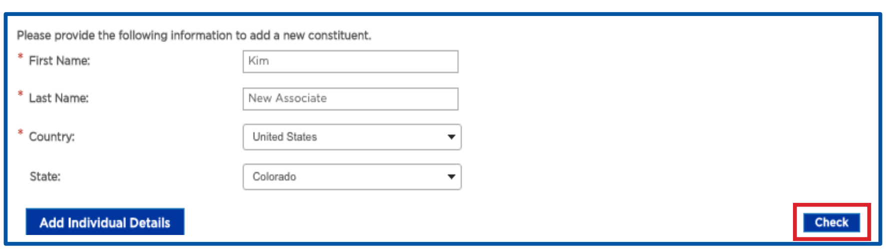
1. Select **Maintain Roster** on the left hand menu.
2. Click the **Add New/Transfer/Reactivate Individual** button.

For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*





3. Enter the new Affiliate's name and select the **Check** button. The system will search the RE/MAX database for your new Affiliate to help you identify whether this will be a brand **New Addition**, **Transfer**, or **Reactivation**.



4. If your new affiliate returns as a search result, indicating they were previously a RE/MAX Affiliate, select their name and click the **Continue** button. If no search results return, click the **Add Individual Details** button.
5. Enter the required information and **Save**.

**Annual Dues must be paid at the time a new Affiliate is added.*

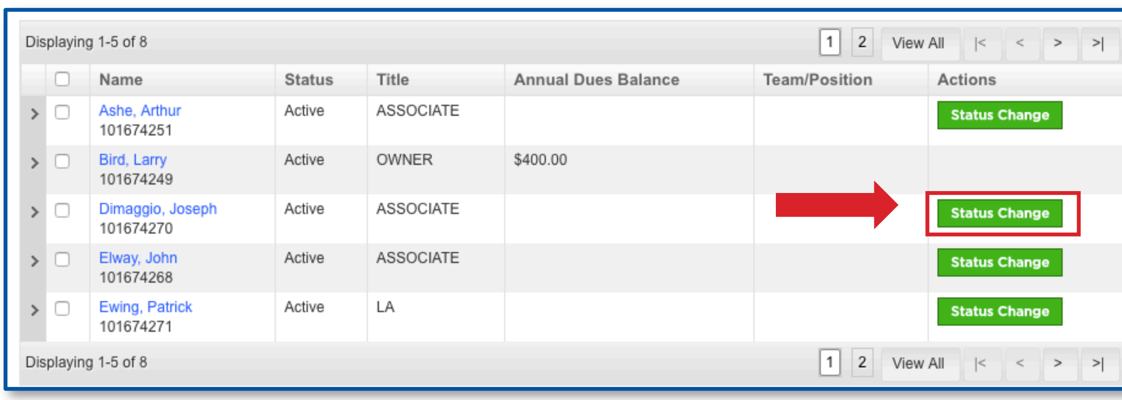
Agent & Office Portal
Managing Your Office Roster

Status Changes:
Leave of Absence, Termination, Title Change

1. Select **Maintain Roster** on the left hand menu.

2. Find the Agent on the roster and select the **Status Change** button.

For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*



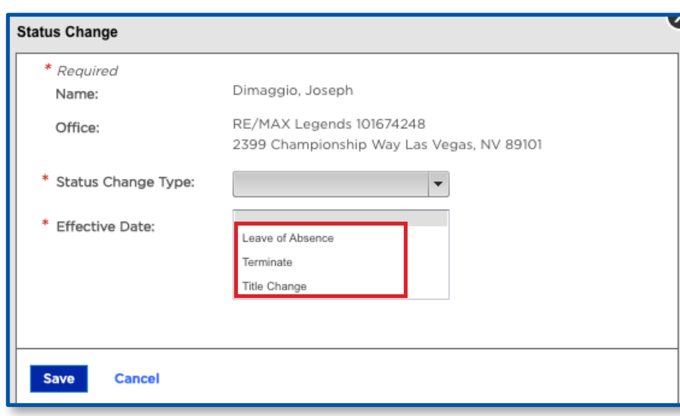
Displaying 1-5 of 8   1 2 View All |< < > >|

Name	Status	Title	Annual Dues Balance	Team/Position	Actions
Ashe, Arthur 101674251	Active	ASSOCIATE			Status Change
Bird, Larry 101674249	Active	OWNER	$400.00		
Dimaggio, Joseph 101674270	Active	ASSOCIATE			Status Change
Elway, John 101674268	Active	ASSOCIATE			Status Change
Ewing, Patrick 101674271	Active	LA			Status Change

Displaying 1-5 of 8   1 2 View All |< < > >|

3. Select one of the three **Status Change Types** available: **Title Change**, **Terminate**, or **Leave of Absence**.

4. Enter the required information and **Save**.



All **Status Changes must be within the current billing period or the next month's billing period.*

Any **Leave of Absence status change cannot exceed 90 days.*

Team Management

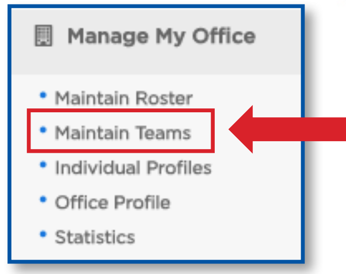
You can now indicate team dynamics within the Agent & Office Portal, allowing for simplified reporting, billing, and awards.

In this section...

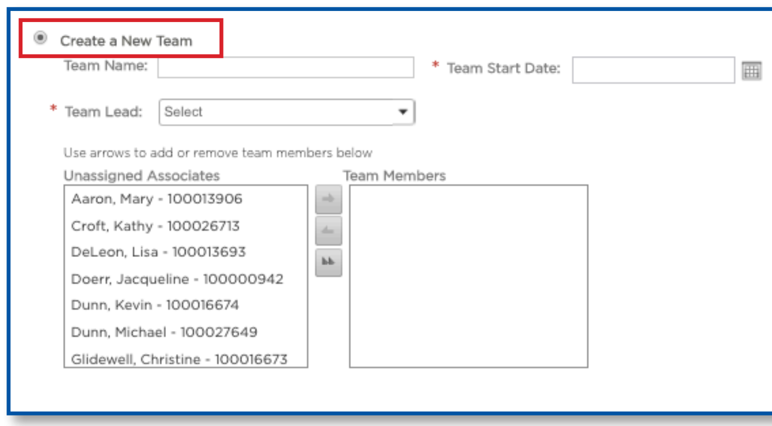
- Creating a Team
- Changing a Team Name
- Adding or Removing Team Members
- Changing a Team Leader
- Dissolving a Team

Agent & Office Portal
Managing Teams

Creating a Team



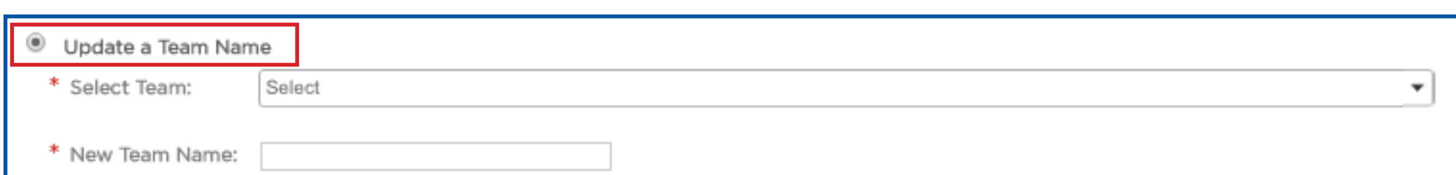
1. Select **Maintain Teams** on the left hand menu.
2. Select the **Create/Update Team** button.
3. Select the **Create a New Team** option.
4. Complete the **Team Name**, select the **Team Start Date** and **Team Lead**.
5. Within the **Unassigned Associates** box, select the Associate(s) to be a part of this team. Use the arrow buttons to move the Associate(s) to the **Team Members** box.
6. Click **Submit**.



For Multi-Office users, use the* ***My Office(s)* *drop down to select the appropriate office first.*

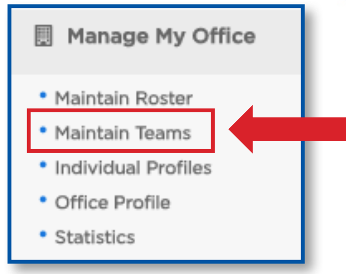
Changing a Team Name

1. Select **Maintain Teams** on the left hand menu.
2. Select the **Create/Update Team** button.
3. Select the **Update a Team Name option.**
4. Use the **Select Team** dropdown menu to select the team you wish to edit, and enter the new team name.
5. Click **Submit**.

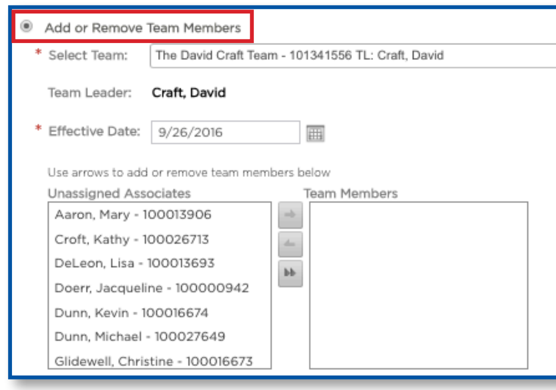


Agent & Office Portal
Managing Teams

Adding or Removing Team Members



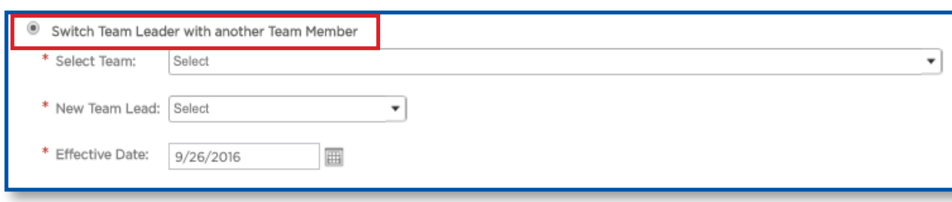
1. Select **Maintain Teams** on the left hand menu.
2. Select the **Create/Update Team** button.
3. Select the **Add or Remove Team Members** option**.**
4. Use the **Select Team** dropdown menu to choose the team you wish to edit. Provide the **Effective Date** and use the arrow buttons to to add or remove team members.
5. Click **Submit**.



For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*

Changing a Team Leader

1. Select **Maintain Teams** on the left hand menu.
2. Select the **Create/Update Team** button.
3. Select the **Switch Team Leader with another Team Member** option**.**
4. Use the **Select Team** dropdown menu to choose the team you wish to edit. Use the second dropdown menu to select the **New Team Lead** from the current Team Members. Provide the effective date.
5. Click **Submit**.



Dissolving a Team

1. Select **Maintain Teams** on the left hand menu.
2. Select the **Create/Update Team** button.
3. Select the **Dissolve a Team** option**.**
4. Use the **Select Team** dropdown menu to choose the team you wish to dissolve. Provide the **Effective Date**.
5. Click **Submit**.

Statistics

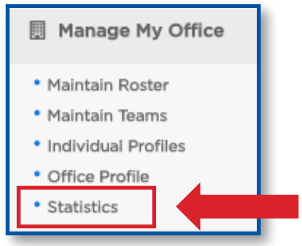
The Agent & Office Portal allows for simplified statistics entry to facilitate billing and awards accuracy.

In this section…

- Adding Individual Transactions
- Uploading Transactions
- Reporting *Other* Transaction Types
- Transaction Upload Template Guide
- Lone Wolf Integration
- Viewing Your Statistics
- Deleting a Statistics Entry

Agent & Office Portal
Statistics

Adding Individual Transactions

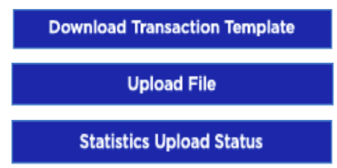


1. Select **Statistics** on the left hand menu.
2. Select the **Add Transaction** button.
3. Enter individual transaction details.
4. Click **Submit**.

Only transactions with a* ***Property Status* *of* ***Closed*** *will be applied to billing and awards.*

Uploading Transactions

1. Select **Statistics** on the left hand menu.
2. Select the **Download Transaction Template** button. The file will be saved to your computer.
3. Open the file and enter transaction information into the template. Use the template guide on the following page for correct formatting.
4. Once the template has been completed and saved to your computer, select the **File Upload** button and complete steps indicated.
5. Select the **Statistics Upload Status** button to see reports on all uploaded statistics files.



**All entries must match formats exactly in order to be accepted. If there are any formatting issues in the file you will receive an error log with details about the issue. Errors must be corrected before the file can be uploaded.*

Reporting *Other* Transaction Types

Note:* ***ALL REQUIRED FIELDS NOT SPECIFIED BELOW ARE STILL REQUIRED**, and should be reported based on transaction details. If address is unknown, please enter a dummy address.*

REFERRAL COMMISSIONS
- **Commission Amount:** Referral fee amount
- **Side and Volume:** 0
- **Property Type:** Referral
- **Agent Function**: Both

TRANSACTION WITH REFERRAL PAYOUT
- **Commission Amount:** Commission less the referral fee
- **Lead Source:** Referral

RESIDENTIAL LEASE OR RENTAL
- **Commission Amount:** Income received from leases or rentals
- **Lead Source:** Lease or Rental
- **Side and Volume**: 0

RESIDENTIAL PROPERTY MANAGEMENT
No transaction reported.

SHARED TRANSACTIONS
- **Commission Amount:** The agent's share of commission
- **Listing/Selling Side fields:** A decimal (ex. 0.5) representing the agent's share

Ex. Agent co-listed a $250,000 sale at a 50/50 split of the 3% commission:
- **Commission Amount:** $3,750
- **Listing:** .5
- **Listing Amount:** $125,000

COMMERCIAL PROPERTY MANAGEMENT, LEASE OR RENTAL
- **Commission Amount:** Income received from property management, leases or rentals, minus hourly rates or flat fees for renewal negotiations
- **Volume:** Rent for the term of the lease
- **Transaction Side**: Enter "1" if agent is sole agent, or a decimal (ex. 0.5) for a shared transaction
- **Lead Source**: Property Management, Lease or Rental

Agent & Office Portal
Statistics

Transaction Upload Template Guide

**All entries must match formats exactly in order to be accepted by the Portal*

Field Name	Format	Example	Field Name	Format	Example
Office ID (Required)	123456789	100467846	**Property Status** (Required)	CANCELLED CLOSED PENDING UNDER_CONTRACT	CLOSED
Associate ID (Required)	123456789	100983745	**Close Date** (Required)	MM/DD/YYYY	11/01/2016
Statistics Date **(Required If Property is closed)**	MM/DD/YYYY	12/01/2016	**LeadSource** (Optional)	AGENT_WEBSITE LEADSTREET REFERRAL TRULIA PROPERTY_MANAGEMENT LEASE SOCIAL_MEDIA ZILLOW RENTAL	LEADSTREET
Statistics Type (Required)	RES (Residential) COMM (commercial)	RES	**Seller Name** (Optional)	Free Form	John Smith
Currency (Required)	USD	USD	**Buyer Name** (Optional)	Free Form	Martha Jones
Commission Amount (Required if property is closed)	Whole number, no cents	20000	**Address** (Required)	Free Form	254 W. Long st.
Listing (Required)	1 or partial number up to 2 decimals for shared transactions (.5, .35, .75)	1	**City** (Required)	Free Form	Denver
Listing Amount (Required)	Whole number, no cents	455000	**State** (Required)	2 letter abbreviation	CO
Sale (Required)	1 or partial number up to 2 decimals for shared transactions (.5, .35, .75)	1	**Postal Code** (Required)	12345 5 digit US postal code	80237
Sale Amount (Required)	Whole numbers, no cents	333000	**Country Code** (Required)	USA	USA
Team ID (Optional)	123456789	109234288	**MLS** (Optional)	1-4 digit number (LSID for your MLS board from MLS Code List)	104
Agent Function (Required)	BUYING_AGENT LISTING_AGENT BOTH	BUYING_AGENT	**MLSID** (Optional)	Free Form	5884946
Property Type (Required)	SINGLE_FAMILY_HOME CONDO_TOWNHOME AGRICULTURAL INDUSTRIAL LAND MULTI_FAMILY OFFICE RETAIL UNKNOWN REFERRAL	LAND	**Transaction ID** (Optional)	Free Form	234876
Effective Date (Optional)	DD/MM/YYYY (used by BrokerWolf for integration to identify the effective date of the start of the transaction)	25/03/2016	**Team Leader ID** (Optional)	123456789	987454097

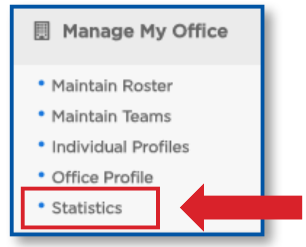
Agent & Office Portal
Statistics

Lone Wolf Integration

1. Select **Statistics** under **Manage My Office**.

2. If your office is set up with Lone Wolf, the transactions will sync to the Portal from the Lone Wolf side. Make sure all **Office** and **Agent IDs** match on both sides. Once connected the only options you will see under statistics while connected to Lone Wolf are **YTD**, **MTD**, and **Transaction Detail**.

**Lone Wolf integration must be toggled on in the back end of the Portal. Please contact Membership to enable.*



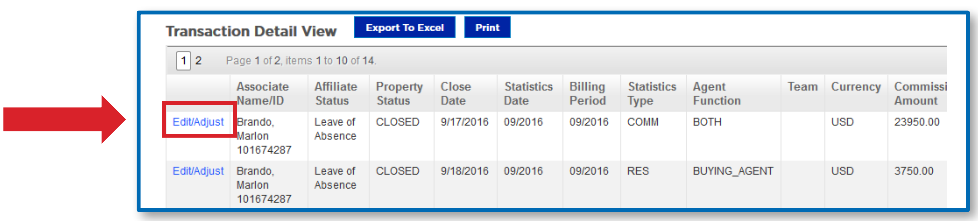
Viewing Your Statistics

1. Select the **Transaction Detail View** button to view all transactions entered into the system.

**All statistics information submitted prior to Portal launch is available for viewing.*

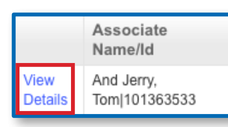
2. Utilize the search fields to narrow down the search results. Select the **Edit/Adjust** link to alter a transaction. View **transaction totals** at the bottom of the page.

**Closed transactions may only be adjusted for up to three months.*



	Associate Name/ID	Affiliate Status	Property Status	Close Date	Statistics Date	Billing Period	Statistics Type	Agent Function	Team	Currency	Commissi Amount
Edit/Adjust	Brando, Marlon 101674287	Leave of Absence	CLOSED	9/17/2016	09/2016	09/2016	COMM	BOTH		USD	23950.00
Edit/Adjust	Brando, Marlon 101674287	Leave of Absence	CLOSED	9/18/2016	09/2016	09/2016	RES	BUYING_AGENT		USD	3750.00

3. Select the **Affiliate MTD/YTD** button(s) to view statistic totals for that time frame. Select the **View Details** link next to any Agent to see their individual transactions.



Deleting a Statistics Entry

1. Select the **Transaction Detail View** button to view all transactions entered into the system.
2. Utilize the search fields to narrow down the search results. Select the **Edit/Adjust** link to alter a transaction.
3. Change the **Commission**, **Listing/Selling**, and **Sale** fields to 0, and **Save**.

Office Billing

The New Agent & Office Portal now allows you to easily manage your RE/MAX monthly billing online!

In this section...

- Important Bill-pay Facts
- Previewing Your Monthly Bill
- Finalizing Your Monthly Bill
- Paying Your Monthly Bill
- Paying Agent Annual Dues
- Order History
- Saved Payment Information

Agent & Office Portal
Office Billing

Important Bill-pay Facts

1. In the new Agent and Office Portal, all bill cycles are now considered **current**. Each bill cycle begins on the first day of the current month and ends on the last day of the current month, giving you access to your financials in real time!

2. Offices have access to preview and finalize their monthly bill beginning on day 20 of the current month and ending at 11:59 EST on day 10 of the following month. If an office does not preview and finalize their monthly bill within this time frame, the office monthly bill will be automatically finalized on the office's behalf.

   EXAMPLE: The April bill cycle starts April 1 and ends April 30. You have until May 10 to preview, finalize, and pay April's monthly bill, otherwise it is considered late.

3. You must preview and finalize your monthly bill each month before you have the ability to pay it. If you have multiple offices, you must complete this process with all offices.

4. If something looks wrong on your monthly bill, you now have the power change it in real time! You can change your bill by making changes to your office roster or to any transaction statistic. New 'Preview' reports can be ran as many times as needed!

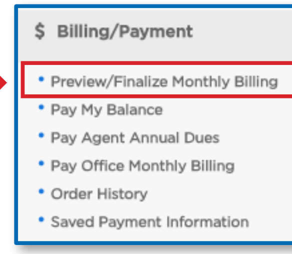
5. Notifications will be emailed out on the **1, 6, and 10** days of the month before the bill will finalize automatically that evening.

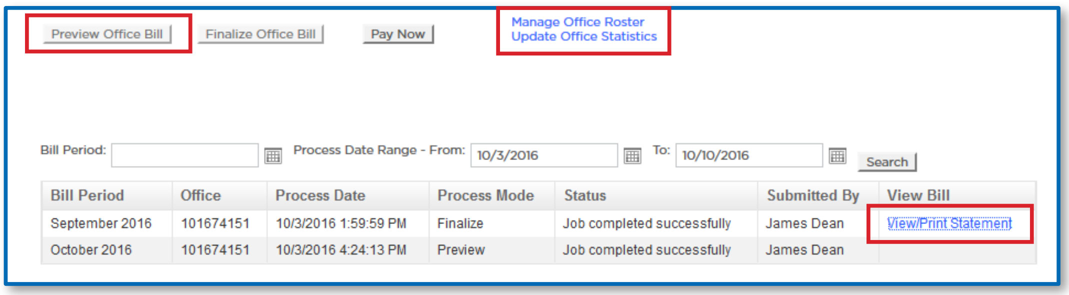
**Any questions regarding billing can be discussed with your Regional point of contact or RE/MAX Membership Services.*

Agent & Office Portal
Office Billing

Previewing Your Monthly Bill

1. Select **Preview/Finalize Monthly Billing** on the left hand menu.
2. Select the **Preview Office Bill** button to generate a preview of your monthly bill.
3. Once the preview is generated select the **View/Print Statement** link to review your bill, ensuring that it accurately represents your roster and statistics for the month.





Bill Period	Office	Process Date	Process Mode	Status	Submitted By	View Bill
September 2016	101674151	10/3/2016 1:59:59 PM	Finalize	Job completed successfully	James Dean	View/Print Statement
October 2016	101674151	10/3/2016 4:24:13 PM	Preview	Job completed successfully	James Dean	

**The process of generating a preview may take up to 10 minutes.*

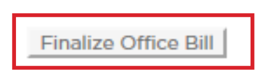
**Bill previews will automatically be generated for all offices on the last day of each month, though you may generate a preview as early as day 20 of each month.*

**If any changes are made to the office roster or statistics, rerun the office bill preview to view the updated bill.*

4. If the bill is incorrect, you may select the **Manage Office Roster** link or **Update Office Statistics** link to make changes to anything that might affect your bill. Once the appropriate changes are made, run the **Preview Office Bill** report again.

Finalizing Your Monthly Bill

1. After previewing your monthly bill and making any necessary roster or statistics adjustments, select the **Finalize Office Bill** button.



2. When the confirmation pop-up window appears, select the checkbox to acknowledge that the information is correct, then click **Finalize.**
3. Once finalized, click the **View/Print Statement** link to view your final Office Monthly Billing statement.

**After the bill is finalized you are no longer able to make roster changes for that billing period.*

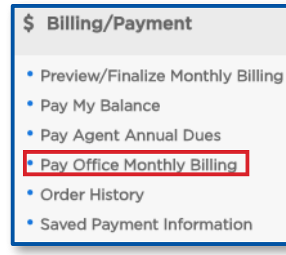
**Any changes to statistics made after the bill is finalized will apply to the following month's bill.*

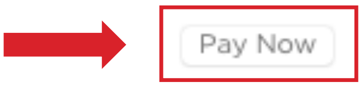
**If not already completed, the system will automatically finalize bills at 11:59pm ET on day 10 of each month.*

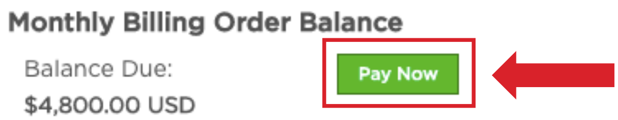
Agent & Office Portal
Office Billing

Paying Your Monthly Bill

1. Once your Office Bill has been finalized for the month, there are several ways to access the payment screen:
    - From the **Preview/Finalize Monthly Billing** screen select the **Pay Now** button.
    - From the homepage select the green **Pay Now** button under **Monthly Billing Order Balance**.
    - Select **Pay Office Monthly Billing** on the left hand menu.

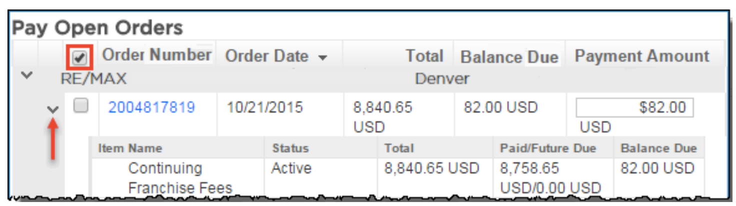






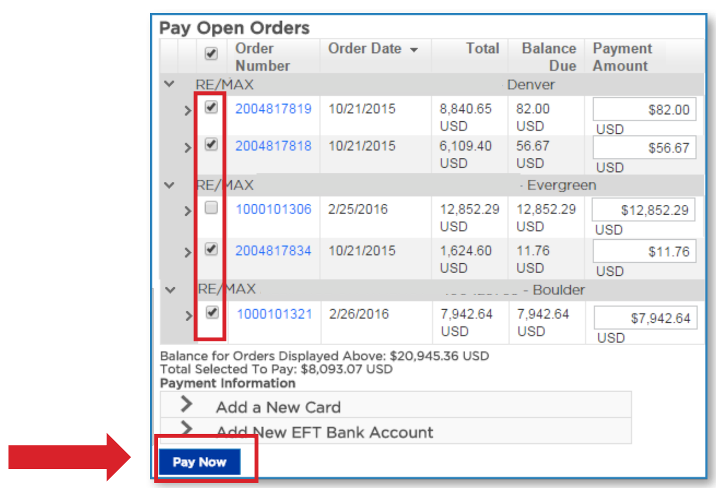
If your office bill has not been finalized, please follow the **Preview/Finalize Monthly Billing instructions.*

2. On the **Pay Open Orders** screen, you may view your bill details by either selecting the arrow to the left of the order, or by clicking the blue order number which will then allow you to print or email the billing statement.



3. On the **Pay Open Orders** screen, use the checkboxes to indicate which order(s) you would like to pay. You may have multiple orders if you have past due bills, or multiple offices.

4. Select the payment option, fill out all required information and click **Pay Now.**

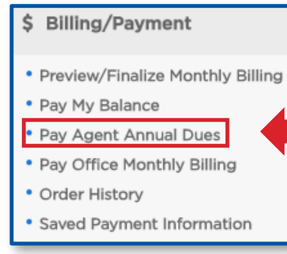


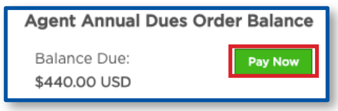
**If the total you want pay exceeds $15,000, the maximum payable by credit card limit, only the EFT Bank Account option will be available.*

Agent & Office Portal
Office Billing

Paying Agent Annual Dues

1. There are two ways to access the payment screen for **Agent Annual Dues**:
   - From the homepage select the green **Pay Now** button under Agent Annual Dues Order Balance.
   - Select **Pay Agent Annual Dues** on the left hand menu.



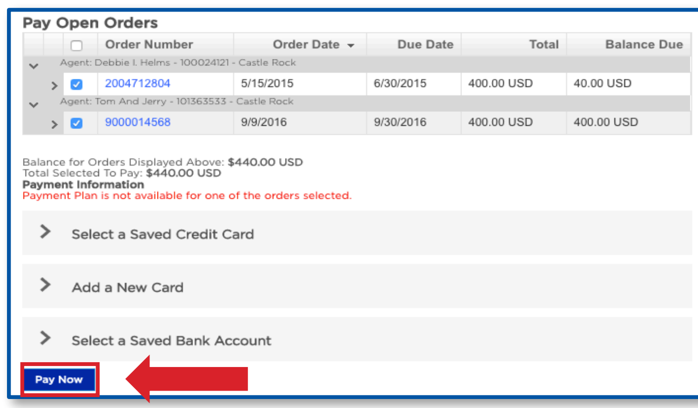


For Multi-Office users, use the **My Office(s) drop down to select the appropriate office first.*

2. On the **Pay Open Orders** screen, you may view the annual dues order details by either selecting the arrow to the left of the order, or by clicking the blue order number which will then allow you to print or email the statement.

3. On the **Pay Open Orders** screen, use the checkboxes to indicate which order(s) you would like to pay. Each agent annual due balance will be represented by a different order number.

4. Select your preferred method of payment and click **Pay Now**.



**Note: If the office or broker is paying the agent annual dues, there is not an option pay in installments; the order must be paid in full.*

Order History

1. Select **Order History** on the left hand menu to see past monthly billing and annual dues statements.

Use the **Date Range dropdown to display orders generated in that month.*

Saved Payment Information

1. You may save a payment type at the time of order payment. Saved payment types can be edited or deleted by selecting **Saved Payment Information** on the left hand menu.