



Module 2

| Integration

Module 2 – Integration

There are many things to do to when you are a new associate or new to our company. Please complete these tasks as possible. As soon as you are finished with this Module 1 - Integration, you'll be prepared to continue with Module 2. Please place a checkmark in the box when you have completed each item.

The list is broken in categories. Review your progress with you mentor/coach at your weekly one-on-one.

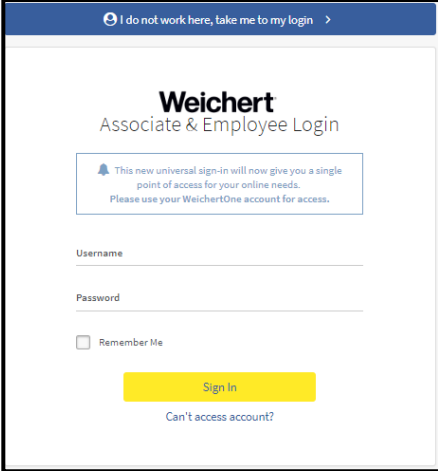
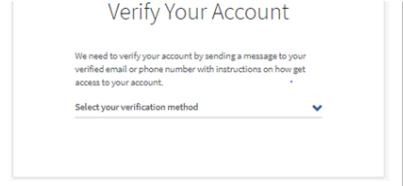
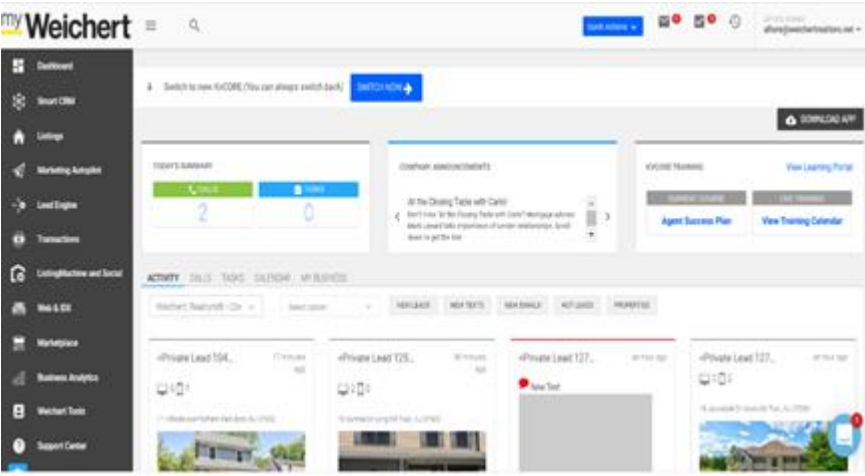
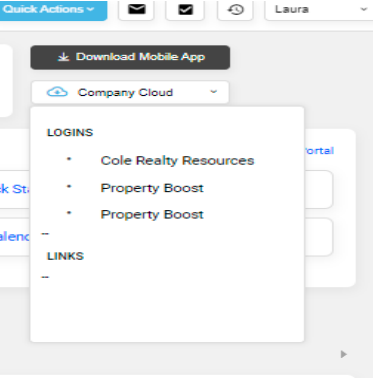
Administrative:

✓	Admin Item	Notes
	Tour the Office	Schedule a more detailed tour of the building. Learn where all tools, resources, training materials, your mailbox, documents, signage area, lock boxes, marketing materials, open house boards, etc., are located.
	Conference Room and Scheduling	You may use them as needed. To schedule, talk to the front desk at (610-624-1818) to reserve your time. These are for client meetings only. Cancel reservation if you no longer need it.
	Set Up Voicemail	Access your voicemail, and change your greeting, letting callers know you are an agent with Weichert, Realtors - Cornerstone
	Create Email Signature	Include your name, title, phone number, email, and company logo
	Learn How to Use Office Equipment	Scanner, fax, copier, computers, postage machine, helium tank, etc.
	Review Live Well	Enroll by calling 1-888-610-1031. For more information, visit promo.getmerido.com/programs/weichert-affiliates . Enrollment is on a rolling basis by the 18 th of the month. Live well flyer located in the resource section of Module 2 - Integration

Realtor Associations and MLS

✓	Realtor Assoc/MLS	Action Item
	Become member of your board or Realtors. Board Name_____	Fill out the Membership Form and send to (insert local MLS information.) Pay all the necessary dues for NAR, State and local association, MLS and Electronic key.
	New Member Orientation and Ethics Class	Schedule a Time to take the New Member Orientation. We strongly recommend you take this class ASAP. You can schedule here: (include website) _____ Orientation Class Date:_____
	MLS Training Class	Schedule a Time to take the MLS Training Class. You schedule this at the same time as your Orientation. MLS Training Date:_____
	MLS Account	Once you have MLS access, you can access _____, our MLS system. We suggest you set this up at their office, in case you have any issues logging in or have questions. The MLS access website is here: (include website) MLS Login:_____ MLS Password:_____
	ShowingTime	ShowingTime (or insert what your company uses) This is a convenient application to schedule appointments. It allows brokers to schedule showings online and eliminates a lot of scheduling logistical load. You can access ShowingTime via (your local MLS) but you will also have a separate login. See the Help Page in ShowingTime for information on how it works. Login:_____ Password:_____
	RPR	RPR is a quick useful app for pulling both public records on properties, as well as providing rough ideas of property value. RPR is accessed via the local MLS, and also has its own separate login. Login:_____ Password:_____

Weichert Systems

Getting Started	
<p>All our Weichert systems can be accessed through my.weichert.com with Single Sign on credentials</p> <p>Go to www.my.weichert.com</p> <p>Enter log in credentials you received in an email.</p> <p>If you can't find the message, contact the service desk, and request your log in credentials 973-290-5722</p>	<div data-bbox="630 189 1065 657">  <p>The screenshot shows the Weichert login page. At the top, there is a link: "I do not work here, take me to my login". Below that is the Weichert logo and the text "Associate & Employee Login". A blue box contains a message: "This new universal sign-in will now give you a single point of access for your online needs. Please use your WeichertOne account for access." There are input fields for "Username" and "Password", a "Remember Me" checkbox, and a yellow "Sign In" button. A link "Can't access account?" is at the bottom.</p> </div> <div data-bbox="1073 189 1482 657"> <p>To set up your verification method Click on "Can't Access Account?" Choose from the Drop-Down Box</p> <p><i>Best Practice: Send your Verification code to your cell number</i></p> <div data-bbox="1081 464 1482 648">  <p>The screenshot shows the "Verify Your Account" page. It says: "We need to verify your account by sending a message to your verified email or phone number with instructions on how to get access to your account." Below this is a dropdown menu labeled "Select your verification method".</p> </div> </div>
myWeichert	
<p>(www.my.Weichert.com)</p> <p>myWeichert is your full Contact Relationship Management system. This system will efficiently and effectively run your business. You need to build and manage a database of your prospects, leads and clients. myWeichert also provides you the tools to generate more leads, organize your prospecting activities, customize automated campaigns and promote your personal website</p>	<div data-bbox="630 783 1490 1255">  <p>The screenshot shows the myWeichert dashboard. It has a sidebar with navigation links: Dashboard, Smart CRM, Settings, Marketing Activities, Lead Engine, Transactions, Collateral and Social, Web & SEO, Marketplace, Business Analytics, Weichert Tools, and Support Center. The main area has a "Switch to new MyCORE (You can always switch back)" button. Below this are sections for "TODAY'S SUMMARY" (with 2 leads and 0 tasks), "COMMON ACTIONS/TASKS" (with a tip about the Closing Table), "MYCORE TRAINING" (with links to "Agent Success Plan" and "View Training Calendar"), and "ACTIVITY" (with tabs for CALLS, TASKS, CALENDAR, and MY BUSINESS). The bottom section shows several "Private Lead" cards with details like "Private Lead 104", "Private Lead 125", "Private Lead 127", and "Private Lead 127".</p> </div>
<p>Cole Realty Resource and Weichert have partnered to provide a database of neighborhoods with home & e address and phone numbers scrubbed against the DNC list.</p> <p>You can access Cole Realty Resource from your myWeichert homepage – under the Company Cloud dropdown.</p>	<div data-bbox="630 1266 1000 1644">  <p>The screenshot shows a dropdown menu titled "Company Cloud". It has two sections: "LOGINS" and "LINKS". Under "LOGINS", there are three items: "Cole Realty Resources", "Property Boost", and "Property Boost". Under "LINKS", there is a minus sign icon.</p> </div> <div data-bbox="1008 1339 1503 1514"> <p>Work with your Manager to identify a farm area, then pull the list of contacts available in your farm to import to myWeichert CRM and prospect by mail/call/email</p> </div>

Weichert Tools

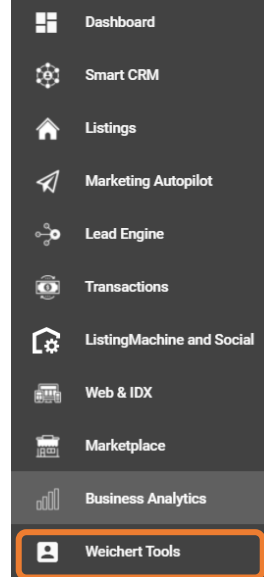
(www.weicherttools.com)

Weichert Tools can be accessed from the left toolbar on your myWeichert dashboard or by entering the above address into your browser.

This page provides access to all Weichert Systems – University, WeichertOne and Weichert Design Center Resources and Tools to support you in your sales activities and lead generation are located in the *Marketing Resources* tile and *Tools & Resources* tile and *Personal Marketing Materials* tile.

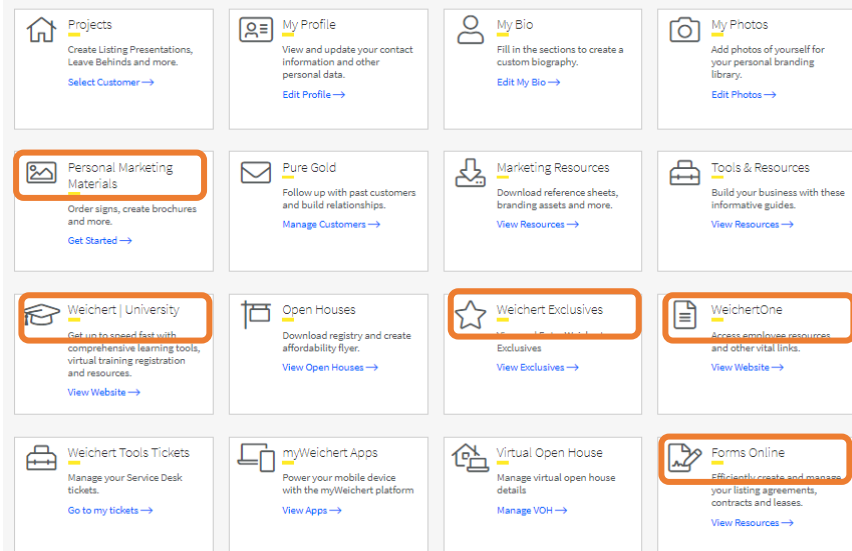
Take time to open each tile and review the materials available.

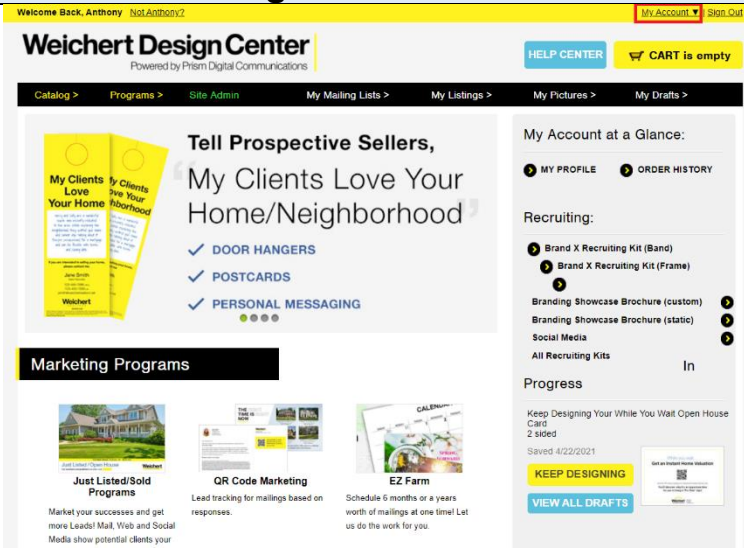
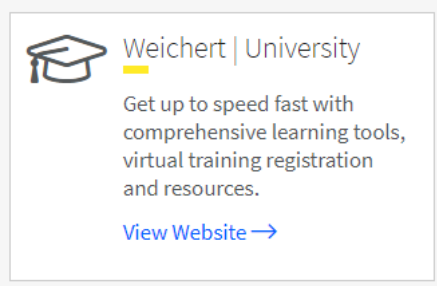
my **Weichert**



Weichert Tools

🔔 You have 0 alerts waiting to be viewed.



WeichertTools		Personal Marketing tile
<p>Weichert Design Center is our partner, providing professional personal and property marketing pieces as well as effective direct mail campaigns.</p> <p>Go to “My Account” Check your account settings and verify your email address</p> <p>Set up your Profile</p> <p>Upload professional photo</p> <p>Add your Website</p> <p>Add a payment method</p>		
Weichert Tools		Weichert University tile
<p>Weichert University is your resource for a variety of training resources – both LIVE web-based and self-paced, to support you in your business. Check back often for new programs and workshops designed for Sales Associates at all levels of experience.</p>		
Weichert Tools		Weichertone
iMail (Quantum Digital)	<p>This is your one stop marketing platform.</p> <p>Go to www.wreaimail.com in the upper right corner click on the “Login” button. Your username should be your email and your password should be your last name in all lowercase letters. It takes about two days for this program to activate. Once activated, go to the grey person icon in the upper right-hand corner and click the black down arrow. Select the “My Profile” tab and fill in the needed information. Do not forget to save these changes!</p> <p>Username: _____</p> <p>Password: _____</p>	
Google Accounts	<p>If you do not have a gmail account, please create one. You don't have to use it as your main account, but you will need it.</p>	
Facebook Private Group	<p>We have a private Facebook group, just for us brokers! Make sure that you have received an invite from us for access to this group, ask us if you have not received it. The group name is: _____</p>	

Personal Tools for Business

	Item	Description
	Bio	Write your Bio and upload it to myWeichert and Weichert Tools. Use the instructions sheet, on how to write the Perfect Bio.
	Picture	Take your headshot, and upload it to myWeichert and Weichert Tools Get recommendation from Manager/Mentor for photographer.
	SOI Contacts	Compile a list of your initial client list in an excel file (everyone you know). Reference the attached "Sphere of Influence" sheet.
	Name Badge	Office will order and will notify you when they arrive.
	Business Cards	Office will order and will notify you when they arrive.
	Sales Associate Resource Summary	This is an overview of Weichert's tools and services. Located on Weichert University – Business planning section.
	Business Planning Tool	Automated tool located on Weichert University under the Business Planning Section. A Video, a Sources of Income document, the Sales Associate Resource Summary, a Self-Assessment Tool, and a Detailed Success plan are included for helping you establish a budget and action plan for your business. When finished click "Submit" and your manager will receive a copy.

Phone Applications: Download and install all of these.

✓	App	What it Does
	RPR	Mobile Access to RPR property info and values
	Facebook	Social Media
	Facebook Pages	For posting to your business page
	GoToWebinar	Allows you to view Weichert Webinars on mobile
	Google Drive	Access training and other documents on mobile
	Mile IQ	Automatically records your mileage for expense tracking
	ShowingTime	Mobile Access to schedule showings while on the road
	Homesnap	Real estate search engine
	MyWeichert	Mobile Access to MyWeichert App (do NOT use kvCore app)
	MyWeichert Open House	Stand-alone app for use at open houses, synchronizes with MyWeichert
	Canva	Give you access to stock photos and fonts to create social media templates and posts

Weichert's Automated Business Plan

The business planning tool is instrumental in developing your annual goals. You will also receive help from your manager/mentor during the process. The business planning tool tracks your efforts in reaching your goals.

Weichert's Automated Business Plan

✓	Action Item	Notes
	Automated Business Planning Tool	Located on Weichert University under the Business Planning tile. The plan consists of a series of questions to ascertain what activities you

		plan to do and projects your financial earnings, based on these activities.
	Sources of Income Document	This document will assist you in your development of the business plan. Located on Weichert University under the Business Planning tile.
	Associate Self-Assessment Tool	Located on Weichert University under the Business Planning tile. This tool will assist you in choosing the sales activities necessary to generate your desired income.
	2025 Weichert Success Plan	Located on Weichert University under the Business Planning tile.
	2025 Business Plan Video	Watch this video, located on Weichert University under the Business Planning tile. This video will demonstrate how to complete the steps of the business planning process

Errors and Omissions Insurance

Most state real estate commissions require Error and Omissions Insurance (E & O). The information for obtaining this for our state is listed below.

Errors & Omissions Insurance

✓	Admin Item	Notes
	Obtain an Errors & Omissions Policy	