

## Project:

Set up BoldTrail BackOffice

## Cost:

\$250 (one-time fee)

## Timeframe:

1-2 weeks.

## Summary:

- The project includes the set up of all features included in the subscription to Boldtrail BackOffice. *Reference:* <https://boldtrail.com/backoffice/>
- The set up process will be tracked through a deliverables list found below.
- After the project is delivered, any additional request that falls outside of weekly report items, will be billed separately.
- The project includes a 6-month 'Weekly Status' report. (more info below)

## **Note:** The Weekly Status report includes:

- Confirm that Boldtrail has not made any changes that require users to update any information. If necessary, provide the client an explanation of important updates.
- Edit custom dashboard.
- Edit company forms.
- Confirm notifications are working correctly.
- Confirm integrations are working correctly.
- Provide client-specific requests and custom metrics.

## Deliverables:

Based on information found at: <https://support.brotermint.com/en/collections/3908222-admins>

### Initial Onboarding Set Up

- Gather client MLS and real estate business information.
- Gather billing information.
- Gather web domain information.

### System Permissions

- Add users.
- Set up user roles and permissions.
- Add admin MLS information.
- Connect Google Calendar and Drive, if needed.
- Connect MLS.

### Agent Information

- Add agent onboarding checklist.
- Add agent/broker commission information.

### Company Forms.

- Add proprietary forms.
- Add company profile information.
- Add logos and images, if needed.

### Transaction Management

- Add transaction checklists.
- Add custom reports.
- Create an admin custom dashboard to show important metrics.

### Contractor Documentation

- Create a list of BoldTrail points of contact.
- Create the list of items that will be reported weekly to the client.
- Create the procedure for analyzing the items.
- Create Service Level Agreement.
- Obtain client approval of deliverables.