



Welcome to Allison James Estates and Homes! We are thrilled to welcome you to our amazing real estate firm and are excited about providing great broker support to you as an agent. The next seven days are critical in getting you in the “all systems go mode” for functioning as an Allison James Estates and Homes agent and for compliance with the [Bureau of Real Estate](#), your local board and MLS.

The very first step in this process is to set up a call with your broker, within 24 hours, so that he or she can help you with any preliminary questions. It is critical that you call your broker within 24 hours of license transfer.

- [California Brokers](#)
- [California Association of REALTOR®](#)
- [Marketing Materials & Business Cards](#)
- [Build a Sign](#)

New Agent Seven Day Checklist

(Items do not need to be completed in this order).

Sign up for your One-on-One Transition call where we will be able to answer any questions you have regarding your transfer to Allison James Estates and Homes and to ensure a smooth transition. [Click HERE](#)

Attend one of our weekly webinar training sessions (30 minutes). After attending forward the confirmation that you attended to your broker (Email will be titled: Thank you for attending our on boarding training). [Click to register.](#)

- Obtain login for [SkySlope](#). You will receive or have already received an email with this info. If you do not know your password, enter the email address you provided when joining Allison James Estates and Homes and do a password reset.
- Read the FAQ article on the [48 Hour Rule](#).
- Please view our [SkySlope orientation and training videos here](#):
 - [How to Create a Transaction](#)
 - Other SkySlope Videos you may want to view. Other [SkySlope Tutorials](#) you may want to read.
- Change company name on your voicemail.
- Change company name on email signature and be sure to add your Cal_BRE license number.

Change company name on your website(s) and be sure your Cal_BRE license number is visible on at least the main page of your site. Best practice is to have your license number and firm name Allison James Estates and Homes on the footer of all pages on your website.

Change company info on your zipForms. [Click here](#).

Send your broker a friend request on Facebook. You will be added you to our agent group on Facebook. This is a great source of information and referrals.

- Jeff Green <https://www.facebook.com/jeffmgreen>
- Mary Jane Morris <https://www.facebook.com/maryjane.morris.752?fref=ts>
- Omar Helmand <https://www.facebook.com/Omarhelmandhomes/?fref=ts>
- Thomas Bullock <https://www.facebook.com/thomas.bullock.39>

Change company name on Facebook (if you have a Facebook account).

Change affiliation at (or join) Board of REALTORS.

Change affiliation at MLS.

Change your address on the BRE site. Use [eLicensing](#).

Email copies of all current print marketing and websites URLs to advertisingreview@ajicorporate.com

Transfer listings (if applicable). See [article on transferring your listings](#).

Learn how to use Digisign in SkySlope or you may continue to use your own digital signature software. All documents that need broker or corporate signatures [must be tagged for digital signature](#) before sent.

If you are a Metrolist MLS subscriber, contact Jeff Green as soon as you are transferred into Metrolist as an Allison James agent. You will not be able to input a listing until we update your permissions.

Final step: Certify that these items have been completed.

(Print this and send a signed copy to your broker. **Please see print button below to print only the checklist.** You may digitally sign this form).

Agent Name _____

Signature _____

Date _____