

Onboarding a New Agent

From first conversation to a licensed, equipped, compliant agent who can write business — with a checklist that runs itself and a paper trail you can produce at audit.

For: brokers, company owners, and admins One-time setup: about 30 minutes

Per agent afterwards: about 5 minutes

WHAT THIS COVERS

1. The shape of it
2. Part 1 — Build your template once
3. Part 2 — Onboarding an actual agent
4. Uploads, review, and compliance records
5. Where recruiting fits
6. Traps and answers

ORIENTATION

The shape of it

Four things happen, in this order, and they live on different screens. Knowing which is which saves most of the confusion.

1

Recruiting

Tracking someone you are courting, before they have agreed to join. Optional — skip it if they are already coming.

2 The template

A reusable checklist of everything a new agent must do. Built once, used for everyone.

3 The user account

Creating their RealtySlate login, role, and billable status. This is what lets them in.

4 The onboarding record

Assigning the template to that person and tracking their progress to 100%.

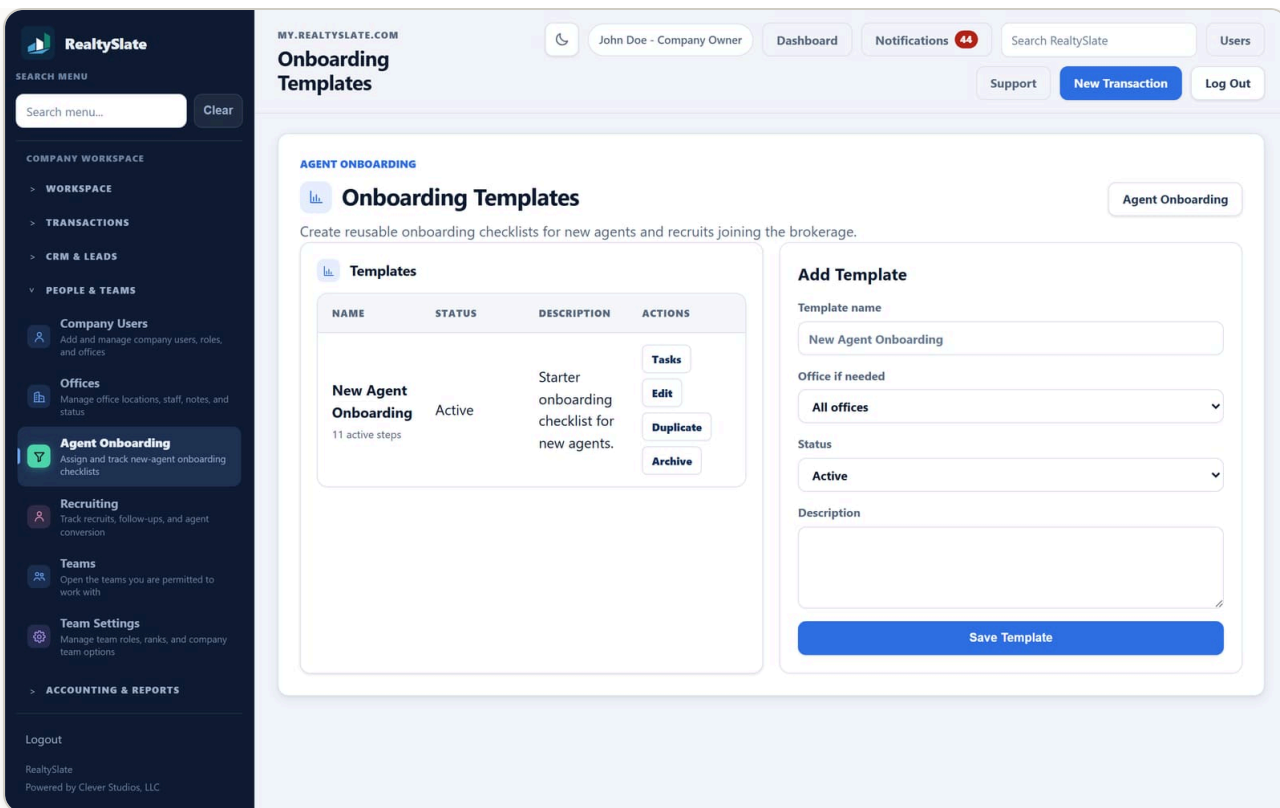
THE ONE TO GET RIGHT FIRST

Build the template before your first hire, not during. Assembling a checklist while a new agent waits is how steps get skipped, and skipped steps on licensing and agreements are the ones that matter at audit.

PART 1 — ONE-TIME

Build your template once

my.realtyslate.com/onboarding-templates.php



Onboarding Templates, with the starter checklist RealtySlate provides.

RealtySlate ships a starter template called **New Agent Onboarding** with eleven steps. Most brokerages should edit that rather than start from nothing — it already covers licensing, agreements, MLS, association, systems, profile, training, and payment details.

1 Create or edit the template

FIELD	WHAT TO ENTER
Template name	What it is for — “New Agent Onboarding”, “Experienced Agent Transfer”, “Referral-Only Agent”.
Office	All offices , or one office. Use a specific office only when that office genuinely differs — a separate association, or its own compliance rules.
Status	Active, Inactive, or Archived. Only Active templates can be assigned.
Description	For your own admins, so the right template is chosen when there are several.

Most brokerages end up with two or three: a full one for newly licensed agents, and a shorter one for experienced transfers who do not need training but still need agreements and payment details.

2

Review the steps

my.realtyslate.com/onboarding-template-view.php?id=<template>

The screenshot displays the Realtyslate Onboarding Template interface. The left sidebar contains a search menu and a company workspace menu with options like Workspace, Transactions, CRM & Leads, People & Teams, and Accounting & Reports. The main content area is titled 'New Agent Onboarding' and shows a list of 11 steps for onboarding new agents. Each step includes a title, description, owner, due date, and requirements. The 'Add Step' form on the right allows users to create new steps with fields for step name, category, who completes it, short instruction, step-by-step details, resource link, due days after start, sort order, status, and compliance item.

STEP	OWNER	DUE	REQUIREMENTS
Upload license Licensing - Upload a current real estate license.	Agent Active	3 days Order 1	U A L
Complete independent contractor agreement Agreements - Complete and return the company agreement.	Agent Active	3 days Order 2	U A I A
Join MLS MLS - Confirm MLS membership or application status.	Agent Active	7 days Order 3	N N
Join Realtor association Associations - Confirm Realtor association membership.	Agent Active	7 days Order 4	N N
Set up email Systems - Create and confirm the company email account.	Admin Active	2 days Order 5	N N
Set up CRM Systems - Confirm CRM access and basic profile setup.	Admin Active	2 days Order 6	N N
Upload headshot Profile - Upload a clean agent headshot.	Agent Active	5 days Order 7	U N
Write bio Profile - Add a short agent bio.	Agent Active	5 days Order 8	N N
Complete training Training - Complete required company training.	Agent Active	14 days Order 9	A A
Add bank/payment info Payment - Add payment details for commission or agent billing.	Agent Active	7 days Order 10	U A A
Review company policies Policies - Review brokerage policies and procedures.	Agent Active	7 days Order 11	N N

Add Step

Step name
Example: Upload real estate license

Category
Licensing, training, systems, pay

Who completes this?
Agent

Short instruction
One simple sentence shown in the checklist.

Step-by-step details
Add exact steps, links to forms, who to contact, or what the agent needs to upload.

Resource link
https://

Due days after start
7

Sort order
12

Status
Active

☐ This task needs a file upload

☐ Admin must review before this step is complete

☐ Show this upload as an agent compliance requirement

Compliance item
Other

☐ Track an expiration date

Add Step

The eleven starter steps, with owner, due date, and requirements.

The starter template looks like this. Note who owns each step — not everything is the agent's job, and the two systems steps belong to your admin.

STEP	OWNER	DUE	REQUIREMENT
Upload license	Agent	3 days	Upload required · compliance record
Complete independent contractor agreement	Agent	3 days	Upload required · compliance record
Join MLS	Agent	7 days	—
Join Realtor association	Agent	7 days	—
Set up email	Admin	2 days	—
Set up CRM	Admin	2 days	—
Upload headshot	Agent	5 days	Upload required
Write bio	Agent	5 days	—
Complete training	Agent	14 days	Admin review required
Add bank/payment info	Agent	7 days	Upload required

Due dates are counted in days from when the checklist is assigned, not fixed calendar dates, so the same template works for everyone regardless of start date.

3 Add or change a step

Each step carries more than a title. The fields that change how it behaves are the last three.

FIELD	NOTES
Step name and category	Category groups the checklist — Licensing, Agreements, MLS, Systems, Profile, Training, Payment.
Who completes this?	Agent, Admin, Broker, Office Admin, or Transaction Coordinator. Be accurate: an admin task assigned to the agent stalls until somebody notices.
Short instruction	One line, shown on the checklist. Say what to do, not what the step is called.

FIELD	NOTES
Step-by-step details	The long version, for anything with more than one action.
Resource link	Where the form, portal, or policy lives. The single highest-value field here — it removes the “where do I find that?” message.
Due date and sort order	Days from assignment, and the order shown.
This step needs a file upload	The step cannot be completed without a document attached.
Admin must review before this step is complete	The agent marks it done; it stays incomplete until an admin approves. Use for anything you would not take on trust.
Show this upload as an agent compliance record	Files the document as a named compliance record. See below — this is the one worth understanding.

PART 2 — PER AGENT

Onboarding an actual agent

1 Create their user account

`my.realtyslate.com/users.php`

Company Users. Add the person here before assigning them a checklist.

Use **Add Company User**. Set their role, their office, and whether they are billable. They receive an invitation to set their own password — you never set one for them.

BILLABLE IS A BILLING DECISION, NOT AN ACCESS ONE

Marking somebody billable is what adds them to your monthly count. A non-producing assistant or an unpaid intern should not be billable; a producing agent must be. Getting this wrong is quiet and shows up on an invoice later.

2

Assign the checklist

`my.realtyslate.com/agent-onboarding.php`

An agent's onboarding record before a template has been assigned.

Choose the agent, choose the template, and select **Assign Template**. Their checklist is created from it and progress starts at 0%.

ASSIGNING AGAIN IS SAFE, AND DELIBERATELY SO

The page states the rule: assigning a template replaces unfinished steps, while completed and skipped steps stay on the record. So you can correct a wrong template choice, or push out an updated one mid-onboarding, without destroying what the agent has already done or the evidence that they did it.

3

Add anything specific to this person

OPTIONAL

Add Custom Step puts a one-off task on this agent's checklist without touching the template. It takes the same fields as a template step.

This is for the genuinely individual: a state-specific licence condition, a hand-over from their previous brokerage, a training module only they need. If you find yourself adding the same custom step for the third time, it belongs in the template.

4

Work it to 100%

The record shows a progress percentage and the full checklist grouped by category. Steps owned by your admins appear alongside the agent's, so nobody has to ask whose turn it is.

Two habits make this work. Check the record at the end of the first week rather than the end of the month, because the 3-day licensing steps are the ones that stall. And clear your own admin steps promptly — email and CRM access block almost everything else the agent is trying to do.

WHY THIS MATTERS AT AUDIT

Uploads, review, and compliance records

Three separate switches, often confused, and each does something different.

SWITCH	WHAT IT DOES	USE IT FOR
Upload required	The step cannot be marked complete without a file.	Anything where the document is the point.
Admin review required	The agent marks it done; it stays open until an admin approves.	Anything you would not take on trust — training, agreements.
Agent compliance record	Files the upload as a named compliance record against the agent.	Licence, independent contractor agreement, and anything a regulator may ask for.

The third is the one worth understanding. Without it, a licence upload is a file attached to a task that will eventually scroll out of view. With it, the document becomes a named record on the agent — the difference between “we collected that somewhere” and being able to produce it.

COMBINE THE SWITCHES ON THE DOCUMENTS THAT MATTER

For licences and agreements use all three: require the upload, require admin review, and file it as a compliance record. Requiring the upload without review means nobody ever looked at what was uploaded, and a wrong or expired document sitting in the file is worse than a missing one, because everyone believes it is handled.

BEFORE THEY SAY YES

Where recruiting fits

my.realtyslate.com/recruits.php

The recruiting pipeline, with conversion and overdue follow-ups.

Recruiting tracks people from first contact through application to joined, with its own pipeline, follow-up dates, and referral fees. It is entirely optional — if somebody has already agreed to join, start at the user account.

The number to watch is **overdue follow-ups**. Recruiting is lost to silence far more often than to a competing offer, and that count is the only place the silence is visible.

When a recruit joins, they become a user and pick up an onboarding checklist like anyone else. The recruiting record stays as the history of how they arrived.

REFERENCE

Traps and answers

SITUATION	WHAT TO DO
An agent's progress is stuck at the same percentage	Check who owns the outstanding steps. It is usually an admin step nobody claimed, not the agent stalling.
You assigned the wrong template	Assign the right one. Unfinished steps are replaced; completed and skipped steps stay.
You updated the template after assigning it	Existing checklists keep the old unfinished steps until you reassign. Reassign to push the change out.
A step does not apply to this agent	Skip it rather than deleting. Skipped steps stay on the record, so the decision is visible later.
An experienced transfer does not need training	Build a second template rather than skipping steps every time. Skipping is a per-agent decision; a template is a policy.
A document was uploaded but nobody checked it	Turn on admin review for that step, then reassign so the requirement applies.
An office has different requirements	Make a template scoped to that office rather than adding custom steps each time.

WHEN YOU ARE FINISHED

What good looks like

- At least one Active template exists before your next hire, not after.
- Licence and independent contractor agreement require an upload, require admin review, and file as compliance records.
- Every step has an accurate owner, so no task is waiting on a person who does not know about it.
- Steps that point at a form or portal carry a resource link.
- New agents reach 100% within their due dates, and the ones who do not are visible to you in week one.

Screenshots are from a RealtySlate test account. Names, addresses, and figures shown in them are generated, not real customer data.