

Franchise Onboarding To Do List Phase TWO

Operational Setup

- ☐ Setting up Authorize.net gateway for automated billing the The Zone and ROGA
- ☐ Setting up Merchant Services
- ☐ Set up Dropbox account to run business operations and set up Dropbox material
- ☐ Establish Office phone mainline phone number and fax number
- ☐ Set up Answering System (Answer Connect) 24/7 support
- ☐ Set up office account with CTMeContracts
- ☐ Set up Set up showing service (Showing Time or Centralized)
- ☐ Purchase URL and emails (Emails for staff and info email for lead generation)
- ☐ Set up Blueroof Office Website
- ☐ Set up all Social Media
 - Facebook Business Page
 - Twitter
 - LinkedIn
 - Group Office Facebook Page
- ☐ Set up QuickBooks
- ☐ Hire Compliance/Transaction Coordinator
- ☐ Computers for Compliance/TC to use.
- ☐ Internet - Use WIFI (Comcast or Century Link)
- ☐ Copier/Scanner/Printer (set up user codes)
- ☐ Determine how you will provide access for agent during off hours (lockbox, Keyfob-can also be used to track printing/copying)
- ☐ Determine office rental fees
- ☐ Coffee and water supplier
- ☐ Order Business Cards/Recruiting Folders/Envelopes
- ☐ TV's in training room and conference rooms (Apple TV)
- ☐ Sky slope Checklist