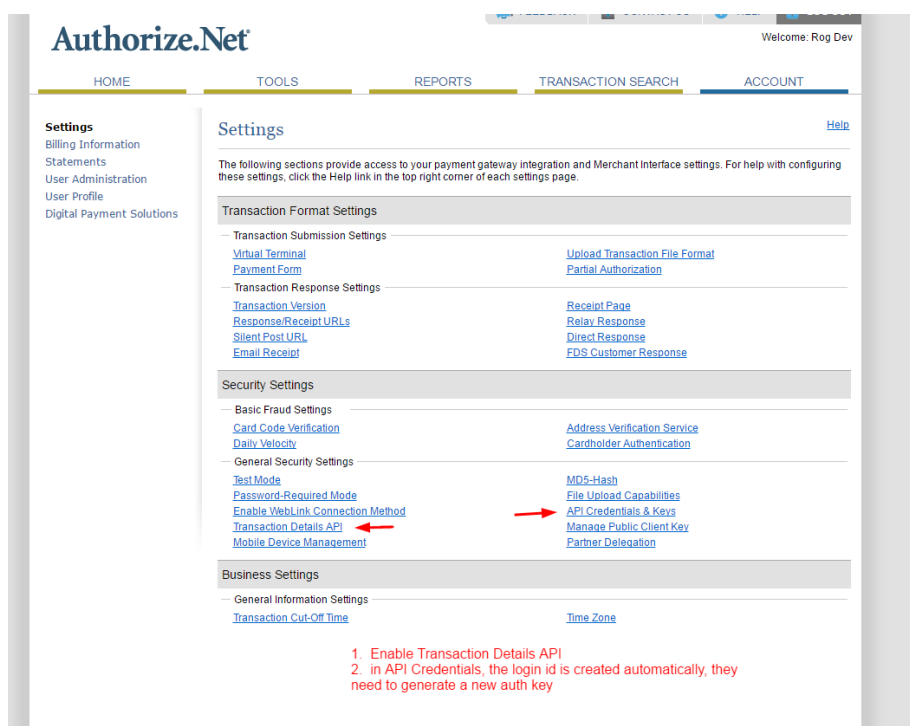


In order to set up a new company in zONE, IT Dev needs the following information:

- 1) Company Profile Information (Basically what is provided on the New Affiliate Information Sheet)
 - a) Company Name, Type (Company, or Office belonging to another Company?), DBA Name, Company Email, Broker Name, TC Name, Compliance Officer Name
- 2) Office Information:
 - a) Location and Office Code Name (6 letter code for Affiliates set by Dan Hart), Phone, Compliance Email, Address, City, State, Zip
- 3) Authorize.Net Merchant Account
 - a) After setting up an Authorize.Net Merchant account, click the “Account” tab at the top to access the account settings page
 - b) Enable Transaction Details API and retrieve Web API Credentials as shown here:



- c) Click on “Transaction Details API” and click Enable button
- d) Click on API Credentials & Keys and do the following:
 - i) The “API Login ID:” should already be set for you by Authorize.Net. Please copy and save this ID
 - ii) You will need to generate a new Transaction Key and save the value provided.
 - iii) Provide both the API Login ID and Transaction Key to IT Dev

4) Billing Payment Types

- a) How much is billed for Site Access per month?
 - b) Do they bill for Key Fob Access, Parking, New Hire Setup, Printer Usage, Risk Management, Mentee Program and how much and how often (monthly, one-time)?
 - c) Are there any other billable items they need not listed above?
 - d) Custom Billing Plans - do they have agents that are on a special billing setup for Monthly Dues (Site Access above) that requires a special amount be billed?
 - i) If so, these agents can be set up with either a custom billing program, a free for year program, a free for life program, or a custom billing exclusion if it is a limited time period where they are not going to be billed.
- 5) Transaction Fee Schedules
- a) These are fees to be applied as transactions are submitted to our Comm Log process and are in general not to be mixed with the billing process (or payments)
 - b) Do they charge a document storage fee?
 - c) Do they use Transaction Coordinators?
 - d) Do they use Teams? If so, what is the team name?
 - e) What is the Fee Structure?
 - i) Ex: 0-499,999 \$250/transaction fee
 - ii) 500,000 - 750,000 \$450 transaction fee
 - iii) Or, every \$250,000 charge \$200
- 6) Private Office setup is to be done by new Affiliate, if applicable
- 7) What Accounting System do they use (for future Comm Log export purposes)?