

New to United

A practical checklist for completing your setup, getting connected, and launching confidently.



GOALS



How to use this guide: Complete each task in order, open the linked resources from the task column, and record questions or completion details in Notes.

1 START HERE - FIRST 3 DAYS	TASK	RESOURCES
	☐ Accept your TREC Broker Invite to United Real Estate.	Trec Video
	☐ Set up onboarding and monthly fee payments within your first 3 days.	Payment Link
	☐ Sign the Independent Contractor Agreement and Policies & Procedures within 3 days.	Onboarding Documents
	☐ Set up your Information About Brokerage Services (IABS).	VIDEO TBD
	☐ Explore UREPORTAL.COM and locate staff contact information.	UREPORTAL.COM
	☐ RSVP for orientation, held Monday and Thursday at 11:00.	Orientation RSVP
2 GET CONNECTED	TASK	RESOURCES
	☐ Complete your new-member meeting with your local Board of Realtors.	Hyperlinks to Metrotex , GFWAR , SABOR , Arlington , and Houston
	☐ Set up MLS access, notifications, text response, profile information, portal greeting, and signature.	Hyperlinks to Metrotex , GFWAR , SABOR , Arlington , and Houston
	☐ Schedule an intake meeting with the Coaching team.	See contact info on ureportal.com
	☐ Provide organizational documents if you use a DBA, LLC, or a business namedifferent from your license.	Connect with Brenda
	☐ Save 817-900-2205 for the Monday 9:30 a.m. brokerage call.	Link to phone and Facebook Forum
	☐ Save 833-459-3350 to receive brokerage text updates.	Link to phone number
3 BUILD YOUR BRAND & PROFILES	TASK	RESOURCES
	☐ Create a professional email address and a custom United signature.	Instructions for adding your update IABS link to your email Signature (2).pdf
	☐ Update your voicemail and claim or refresh profiles on HAR.com, Zillow, Realtor.com, and Yelp.	HAR.com , Zillow , Realtor.com , and Yelp
	☐ Send a current headshot and short bio to United, then announce that you joined.	Include the required IABS and Consumer Protection notices.
	☐ Join the United DFW / Insight Agent Forum and follow the brokerage social pages.	Hyperlinks United DFW/Insight Agent Forum United Real Estate Insight United Real Estate DFW Properties
	☐ Order business cards and yard signs.	Insert ordering guide...hyperlink
4 START HERE - FIRST 3 DAYS	TASK	RESOURCES
	☐ Sign in to Bullseye and Paperless Pipeline using the emailed instructions.	Wes will create videos... using Alex's emails
	☐ Explore the training calendar and begin coaching sessions, systems classes, sales meetings, and continuing education.	United Training Calendar
	☐ Set up your United website and review the vendor list.	See UREPORTAL.COM for the website introduction video.
	☐ Watch "Intro to Bullseye."	Training Video
	☐ Watch "Set Up Your Website."	Training Video
	☐ Watch "Marketing Hub."	Training Video
	☐ Watch "LeadBoost."	Training Video
	☐ Confirm that you can sign in to Instanet and access contract templates.	NTREIS MLS Access
	☐ Review the available health-coverage information.	www.ureghealthcare.com
	☐ Review the EveryDollar budgeting-software membership.	Smart Dollar Sign Up Use company key: UREG
5 STAY ENGAGED & LAUNCH	TASK	RESOURCES
	☐ Start the 90-day action plan in Agent Shared Resources.	
	☐ Attend the monthly breakfast and United social events when possible.	
	☐ Add the third-Thursday 10:00 a.m. Company Meeting to your calendar.	Company Training Calendar
	☐ Share referrals for people who may be a good fit for United.	Ask about the referral thank-you incentive.
	☐ Download the 0 to \$1 Million Pathway.	\$0 to 1mm Pathway