

PART B: Getting Set-up. . . What's Next?

Step 1 – Verify Your Email

Activate your eXp email address. Confirm your email forwarding address to send and receive emails from your eXp Realty address.

This is required to complete your Onboarding. Your **Onboarding Specialist** will call and stay on the line until you have completed this.

Watch for the email to help you with this.



Once your email address is verified, Onboarding Services will confirm a few small details for your personnel file.

This may come as a phone call or by-way-of an electronic document. Once received you will be **CONVERTED** to Active Agent status.



Step 2 - Activate Your Passport

Once you have been CONVERTED to Active status, an automated email will be sent to you, with your eXp Passport Login details. Also, your **AE Specialist** will be reaching out to you. Please allow for 30 minutes to complete the set-up.

Your Passport login will provide 'single-sign-on' functionality for you to access your suite of eXp agent tools, including the back-office system. Please activate your Passport as soon as possible, as the link has an expiry date.



Once you have logged on to exprealty.okta.com - please bookmark this page . You will want to access eXp Apps through this portal!

If you have issues setting up your eXp Passport or activating your eXp email, or if you do not receive these important emails, please reach out to Tech Support by email at support@exprealty.com, or visit Tech Outpost in eXp World, Virtual Campus for **faster service** .





Work

+



Workplace by Facebook



eXpressway To Success



eXp Enterprise



eXp Marketing Center



eXplore eXp Realty



eXp World Download Site



Mindflash



eXp Guest Management



Trello



Lever



eXp Transactions



Shareworks



Step 3 - Download eXp World

Install eXp World to your computer:

www.download.exprealty.com

If you have previously downloaded eXp world with a guest pass it will be deactivated. You will need to log in using your eXp email and Passport password and then create your avatar again.



Step 4 - Workplace & Workplace Chat

This is the platform where we keep up on company news and events, share best practices, and connect with colleagues and staff. It's like Facebook for work. Your Agent eXperience Specialist will contact you to help set you up.

Go To: www.exp Realty.workplace.com



Ensure you are a member of the following Workplace groups:

- Your eXp Provincial Group
- The eXp Realty Canada Group

*Search Workplace for any other groups you may be interested in joining

Ensure notifications are either enabled or disabled



Step 5 – Set Up Your Enterprise Account

Enterprise is the main platform for all your business needs and all things eXp Realty.

Log in to www.expenterprise.com using your eXp email address and password.

Be sure to attend eXp Enterprise Training in eXp World.

For dates and times, visit www.expcloud.com



Step 6 - Register For FINTRAC Certification

This is mandatory federal training and agents must complete it within 14 days of joining eXp Realty

- Training is scheduled the 2nd and 4th Wednesday of every month in eXp World, Canadian Auditorium at 9am PST/10am MST/ 12pm EST.

[CLICK HERE TO REGISTER!](#)

expcloud.com



Step 7 - DNCL (Do Not Call List)

It is required that you comply with the Federal Do Not Call List requirements.

Click on the link below to complete the quick and easy DNCL education and access to the DNCL software Telelisting. Learn useful and profitable ways to use the DNCL and our Telelisting Software – all free of charge.

Use the Telelisting add on for all your phone calls, text messages and faxes, regardless if you are prospecting or just following up.

[CLICK HERE TO REGISTER!](#)



Step 8 - Canadian Orientation

Join us for Canadian Orientation Part I and Part II in eXp World, Canadian Auditorium. The sessions will help guide you on some of the basic information you need to know, where to begin, and who to reach out to for assistance.

CDN Orientation Part I - Monday at 10 AM pst/1PM est / Wednesday at 8 AM pst /11 AM est

CDN Orientation Part II - Tuesday and Thursday at 11 AM pst /1PM est

All sessions are held in the Canadian Auditorium

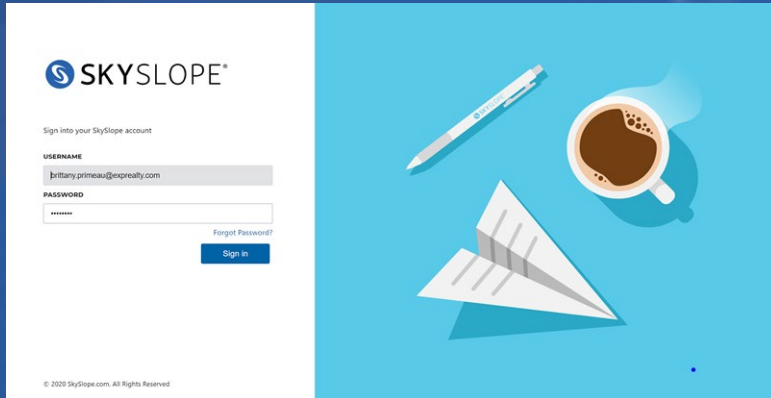
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Step 9 - SkySlope

Your paperless transaction management platform.
Watch for an email titled “Welcome to SkySlope” to login and create your password.

* TIP: Your user name will be your eXp email address



Assistance with SkySlope:
Visit Sara in CDN Ops – Team Canada Rms.
Or email Sara Landriault:
sara.landriault@exprealty.net OR
Workplace chat Sara
OR after business hours, reach out to:
support.skyslope.com



Step 11 - kvCore

Your personal website, CRM and lead generation all in one.

Opt-in to kvCore:

Go To: www.expenterprise.com

- Click on the “**Optional Services**” tab on the left side menu
- Click on “**Sign Up**” and follow the prompts

*It will take approx. 7-10 business day to receive access to your kvCore account. Please note, some MLS boards may require additional paperwork and, as such, could take longer than the estimated timeframe. Keep an eye out for an email “Welcome to kvCore”.

- kvCore Training: expcloud.com
- kvCore Support: expkvcore@insiderealestate.com



Who are my Provincial Contacts?

You can connect with any staff member by visiting them in their office in eXp World (Canadian Operations, Ontario Offices) and/or sending them a Workplace chat message or call and/or by emailing them.

Your Broker Team:

- Anglea Papassotiriou - Provincial Administrative Broker
- Rick Sergison - Central ON (Toronto, Brampton, Oakville)
- Michelle Scott - Southeastern ON (Brockville, Kingston, Ottawa, Timmins, Barrie)
- Val Petrov - Southwestern ON (Cambridge, Sarnia, Hamilton, Windsor)



Office Hours: Monday to Friday 9am to 5pm

Office Phone Number: 1-866-530-7737

Office Addresses: We have a number of office addresses in the province depending on what MLS board you are with. Office addresses are not equipped to handle dropping off cheques, personal deliveries or anything for pick up by others.

Visit your provincial brokerage in Canadian Ops.



Our Ontario Provincial Contacts

Your ON Administrative Team:

- Payouts/Admin (Questions about commission, cap status, fees)
Janice Schoures
- Transactions (Questions about transactions, paperwork)
Rita Casella, Ginette Gravel, Jane Omran, Michelle Davis
(ONTransactions@exprealty.net)
- Listing Specialist (Questions about your listing paperwork)
Paola Pimentel
- eXpand Mentorship Program (Canadian Mentorship Program)
Paola Pimentel
- Skylope (Training and Questions) **Sara Landriault**
- ON BOR – **Angela P. APAB's: Michelle Scott, Val Petrov, Rick Sergison**
- Onboarding: **Silvana McLeod**
- Agent Experience: **Jo Coburn**
- Growth and Expansion Specialist(All Teams) - **John Humphreys**



Step 12 - Sales Meetings

Stay current and up-to-date with everything going on in your province, local board, and connect with other local agents.

Ontario meets every 2nd and 4th Tuesday of each month at 10am (EST) in eXp World, Canadian Auditorium. Set a recurring schedule in your calendar to attend your provincial sales meetings.

<https://expcloud.com/>



Step 13 - Trust Deposits

- eXp Realty does NOT accept cash deposits or Electronic Fund Transfers
- Do NOT have clients mail OR drop off deposit cheques to Regus branch offices.
- Complete the deposit form below for each deposit.

[Real Estate Trust Deposit Form](#)



There are 3 ways to handle Trust Deposits:

- 1) Trust deposits should be made by you directly to a CIBC branch.
Please ensure you receive a deposit receipt by the teller. **OR**
 - 2) Wire Transfer - Contact Janice Schoures (Payout Specialist) for instructions. **OR**
 - 3) Send a COURIER (your cost) with the cheque directly to the following address for staff to handle the deposit...
 - eXp Realty
 - 130 Ruffet Drive
 - Barrie, ON L4N 0N6
- Prior to making your deposit at a CIBC branch, take a copy (photocopy, photo, etc.) of the deposit cheque. You will need to load this to your transaction in SkySlope (transaction mgmt platform) along with the bank deposit receipt.



Step 14 - Health Benefits

The program offers comprehensive and customized benefit options as well as value-added services that suit your specific needs and budget.

*Please note, this is time sensitive. You have 30 days from the day you are active with eXp Realty to sign up for your benefits.

For plan details, go to:

[Health Benefits Information](#)

To apply, go to:

[Health Benefits Application](#)



Step 10 - ShowingTime

This is your answering service, showing, and feedback management platform.

- Look for an email from Showing Time to login and configure your notifications and preferences.
- eXp ONTARIO Office Phone Number: 1-866-530-7737

*Please note, if you had a Showing Time account with your previous brokerage you will need to log in with your eXp credentials moving forward.

For Help, Visit: [ShowingTime Help](#)



Your Agent eXperience Specialist

Contact me, Jo Coburn!

I am happy to assist you! I want to make sure your transition to eXp is eXceptional.

Please feel free to connect with me via Workplace Chat, call 833-671-9442, ext. 121, or email at jo.coburn@exprealty.net with any questions or concerns.

