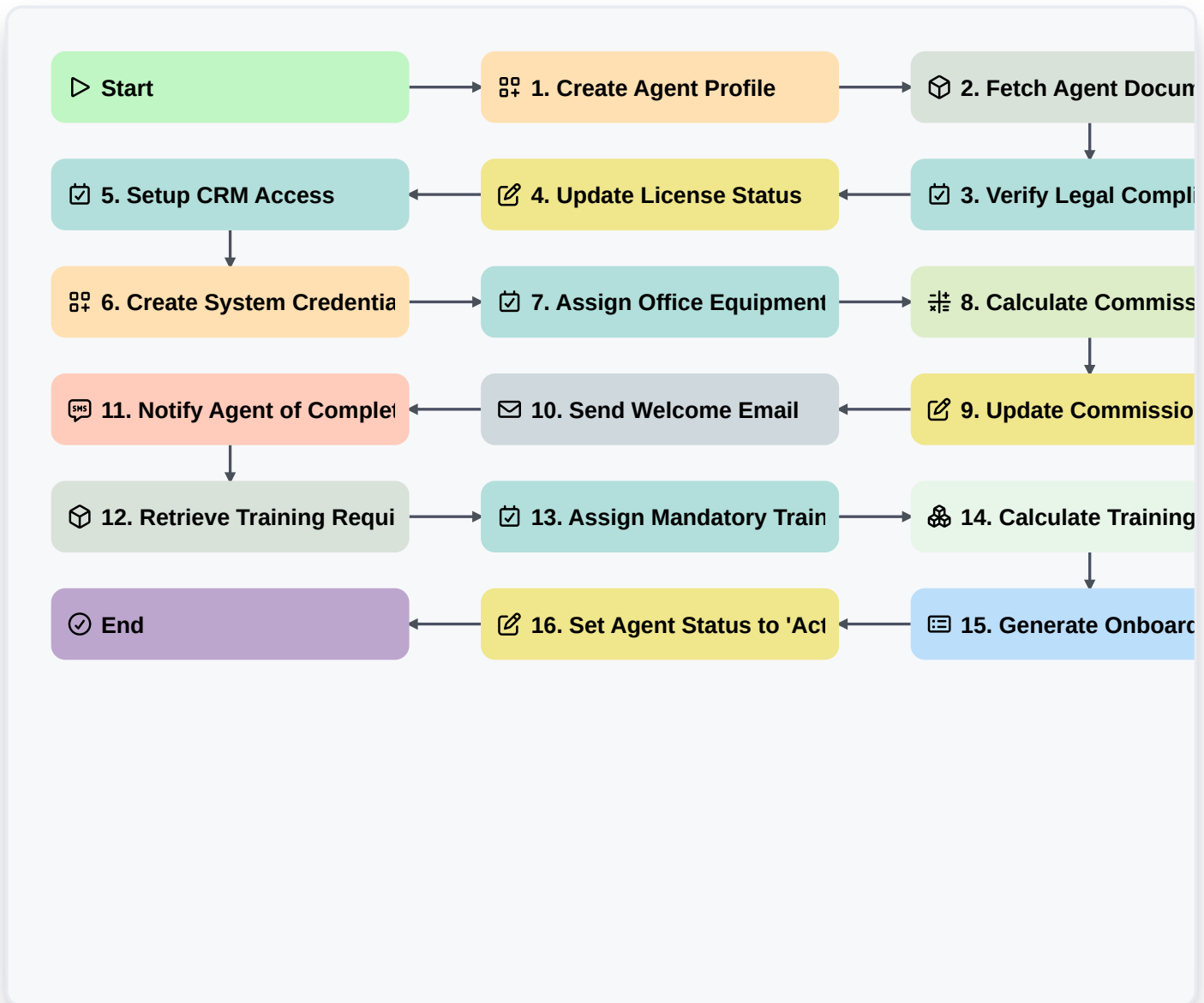


Real Estate Agent Onboarding Process



Start

Start of the Workflow/Process.

1. Create Agent Profile

Create a new entry in the 'Agents' data model to initialize the onboarding record.

2. Fetch Agent Documents

Retrieve existing uploaded files (ID, License, Contract) from the Documents data model.

3. Verify Legal Compliance

Assign a task to the Legal Department to verify the agent's real estate license and background check.

4. Update License Status

Update the 'License Verified' boolean field in the Agent Profile entry after legal review.

5. Setup CRM Access

Assign a task to the IT Department to provision CRM and email credentials.

6. Create System Credentials Entry

Create a record in the 'IT Assets' data model containing the new agent's username and access levels.



7. Assign Office Equipment

Assign a task to the Operations team to prepare laptop, business cards, and office keys.

8. Calculate Commission Split

Calculate the agent's net commission percentage based on their contract terms and company overhead variables.

9. Update Commission Structure

Update the 'Commission Rate' field in the Agent Profile with the calculated value.

10. Send Welcome Email

Send an automated welcome email to the new agent with their onboarding handbook and login instructions.

11. Notify Agent of Completion

Send an SMS to the agent's phone number informing them that their onboarding is complete and they are active.

12. Retrieve Training Requirements

Get a list of mandatory training modules from the 'Training Catalog' data model.

13. Assign Mandatory Training

Create tasks for the new agent to complete specific compliance and sales training modules.

14. Calculate Training Progress

Aggregate completed training modules vs. total required modules to determine the percentage of completion.

15. Generate Onboarding Summary Report

Create a final report summarizing the agent's onboarding timeline, completed tasks, and verified documents.

16. Set Agent Status to 'Active'

Update the final status field in the Agent Profile to 'Active' once all tasks are verified.

End

End of the Workflow/Process.