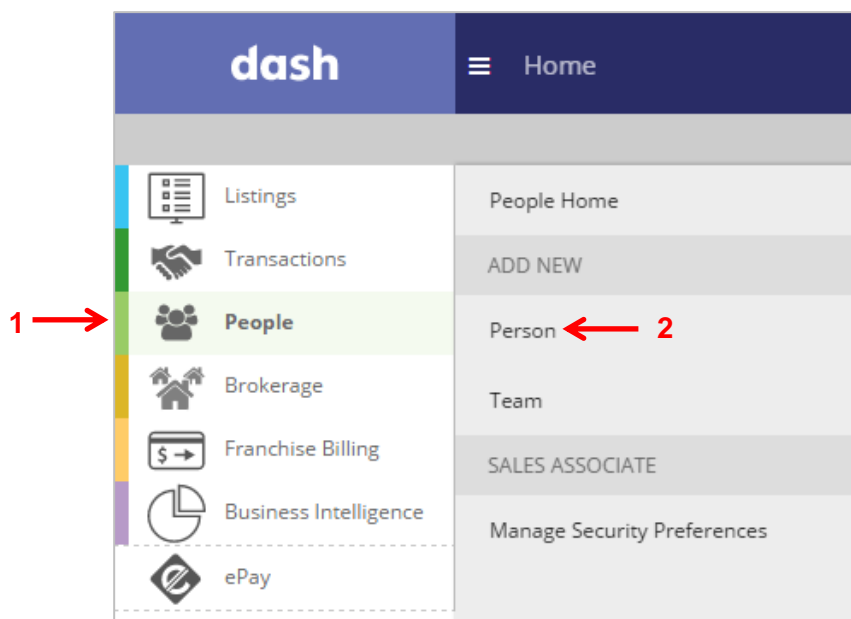


## Add a Person

You must add all sales associates and non-sales staff members for your company into dash. This is necessary in order for you to associate sales agents with their listing(s) and grant individuals the appropriate access to dash and/or your brand website.

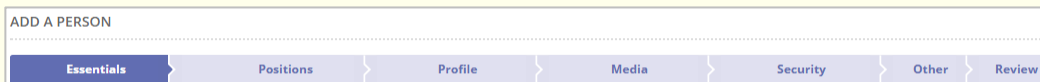
Fields marked with an asterisk (\*) are mandatory.

1. Click **People** on the left navigation menu.
2. Click **Person**.



The **Add a Person** form displays.

3. Navigate to any tab by clicking the tabs at the top of the screen.
4. Enter the information in the fields for each tab. You will be prompted if there is missing information required on a tab.



The rest of this guide walks you through each tab of the **Add a Person** form.

Remember that all fields marked with an asterisk (\*) are mandatory.

### Essentials Tab:

1. Enter the person's information into the appropriate fields.
2. Click **Positions** to move on.

ADD A PERSON

Essentials Positions Profile Media Security Other Review

FIRST NAME \* --SELECT--

MIDDLE NAME

LAST NAME \*

SUFFIX Jr, Sr, III etc.

FAMILIAR NAME \*

PRINTED NAME \*

STARTED IN BRAND \* mm/dd/yyyy

PREVIOUS AFFILIATION

EMAIL \* ADDRESS TYPE Business +

PHONE \* NUMBER TYPE Mobile + Show Mobile Phone on Profile

WEBSITE & SOCIAL MEDIA SITES WEBSITE URL TYPE LANGUAGE --SELECT-- --SELECT-- X

Cancel **2** → Positions >>

If there are already similar names in dash, you will see this alert to help prevent duplicate entries.

If the person you are entering does not already exist in dash:

3. Click **Ignore**.

If the person you are entering already exists in dash:

4. Select which record the person belongs to.
5. Click **Edit Person** to proceed with editing the person's record, if necessary.

PERSON MATCH

This person may already exist in our system

<input type="radio"/>	LINDA SHARKEY		
<b>4</b>	Person ID 0123	Positions Sales Associate	Active Since Oct 23, 2012
<input type="radio"/>	Linda Sharkey		
	Person ID 10201	Positions Owner Owner Owner Sales Associate Owner Owner Owner	Active Since Oct 25, 2012

**3** Ignore **5** EDIT PERSON

**Positions Tab:**

On this tab, you will assign the person a Sales position and/or Non-Sales position.

6. Complete the fields on the form.
7. Click the **Position** dropdown menu to select a Sales Position.
8. Confirm if you want the person's profile to show on the websites. By default, this is checked to **Show Online**.
9. Indicate if the Sales Associate worked for a Realogy brand office during the current year. This question is used to capture information for awards purposes.
10. Click **Modify Offices** to select the office(s) to associate the person.

ADD A PERSON

Essentials  Positions  Profile  Media  Security  Other  Review

*A person record must have at least one Active Sales or Non-Sales Position.*

SALES POSITION

SPECIALTY  Residential  Commercial

MLS ID

Full time  Part time

POSITION	OFFICES	EFFECTIVE DATE	SHOW ONLINE
7 → Sales Associate	<b>Select Offices</b> 10		8 → <input checked="" type="checkbox"/>

DISPLAY AS

LICENSES	TYPE	NUMBER	STATE/ PROVINCE	ISSUE DATE	EXPIRATION DATE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PRIOR PRODUCTION Has this Sales Associate worked for a Realogy Brand office during the current calendar year?  
 Yes  No 9

The **Select Offices for Position: Sales Associate** window displays.

11. Click the appropriate office(s) to associate the person. You can also click **Select All** to select all the offices within your company.
12. For each office selected, set the **Effective Date**.
13. Check **Use the same Effective Date for all** if you want the same effective date to be used for all offices selected.
14. Click **Apply**.

Select Offices for Position : Sales Associate

Select Offices

SELECT ALL  Use the same Effective Date for all 13

Pick Office	OFFICES	EFFECTIVE DATE
0002 - 332 E. County Road D..., St Paul		
0004 - 11812 Wayzata Blvd..., Minnetonka		
0008 - 12390 Sherburne Ave..., Becker		
0012 - 4600 W. 77th Street..., Edina		
0013 - 324 Broadway Suite 1..., Alexandria		
	0001 - 7915 Stone Creek Dri..., Chanhassen	<input type="text"/> <input type="button" value="Calendar"/> <input type="button" value="X"/>

11

12

14 →

You will be brought back to the **Positions** tab.

- 15. Scroll down and click the **Position** dropdown menu to select a Non-Sales Position, if applicable.
- 16. Confirm if you want the person's non-sales position to show on the websites.
- 17. Click **Select Offices** to select the office(s) to associate the person.

- 18. Determine if you would like to assign the individual the Non-Sales position for the entire company, or select offices.
- 19. To assign to select office(s), click to pick the office(s).
- 20. For each office selected, set the **Effective Date**.
- 21. Check **Use the same Effective Date for all** if you want the same effective date to be used for all offices selected.
- 22. Click **Apply**.

You will be brought back to the **Positions** tab.

- 23. Click **Profile** to move on.

### Profile Tab:

24. Click to select any relevant **Designation** and **Spoken Languages**.

Essentials ✓ | Positions ✓ | **Profile** | Media | Security | Other | Review

PROFILE DETAILS

CHOOSE DESIGNATION

Q  
Pick or Search Designation

- Accredited Buyer Representative
- Accredited Buyer Representative Manager
- Accredited Farm and Land Member
- Accredited Land Consultant
- Accredited Luxury Home Specialist
- Accredited Residential Manager
- Accredited Seller Representation
- Accredited Staging Professional
- Admirals Academy

Selected Designations

CHOOSE SPOKEN LANGUAGES

Q  
Pick or Search Languages

- Spanish
- Swedish
- Tagalog
- Mandarin Chinese
- German
- French
- Portuguese
- Russian
- Hmong
- Yue Chinese
- Chinese

Selected Languages

English ✕

### Profile Tab (cont.):

- 25. Click to select any relevant **Specialization**.
- 26. Add remarks for the person by selecting the **Remarks Type** and **Language**
- 27. Enter the agent profile remarks in the text box.
- 28. Click **Apply**.
- 29. Click **Media** to move on.

The screenshot shows a 'Profile Tab (cont.)' interface. At the top, there is a 'CHOOSE SPECIALIZATION' section with a search bar labeled 'Pick or Search Specialization'. Below the search bar is a list of specializations: Adult Communities, Apartments, Auctions, Building Lots, Building Management, Buyer Representation, College/University, Commercial leasing and Rentals, Commercial Property, Custom Homes, and Development Land. A red arrow labeled '25' points to this list. To the right of the list is a 'Selected Specializations' area. Below this is a 'REMARKS' section. It contains two dropdown menus: 'REMARKS TYPE' and 'LANGUAGE', both currently set to '-- SELECT --'. A red arrow labeled '26' points to these dropdowns. Below the dropdowns is a text box for entering remarks, with a '4000 characters remaining' indicator. The text box has a rich text editor toolbar with buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Indent. A red arrow labeled '27' points to the text box. Below the text box is a blue 'Apply' button, with a red arrow labeled '28' pointing to it. At the bottom of the form are three buttons: a grey 'Cancel' button, a blue 'Media >>' button, and a red arrow labeled '29' pointing to the 'Media >>' button.

**Media Tab:**


30. Click **+** to browse and select photo(s) that you have previously saved to your computer.
31. Once the photo(s) have been successfully saved, they will appear on this tab as shown.
32. Click **Tags & Description** to add a caption and description for the photo in a different language, if you choose.
33. Click **Security** to move on.

**ADD A PERSON**

Essentials ✓ | Positions ✓ | Profile ✓ | **Media ✓** | Security ✓ | Other | Review

PERSON PHOTO (1 of 4 Limit)

Drag any photo to the desired sequence. SELECT ALL | DELETE SELECTED

 + **30**

Tags & Description ← 32

**33** →

### Security Tab:

The Security tab is where you will assign the person access to dash or the brand website.

**NOTE:** User ID and Passwords will be emailed to the **Business Email** entered into dash on the Essentials tab.

- 34. Select the application from the dropdown menu.
- 35. Click **Manage Role** for each role you would like to assign access for the individual.

DO NOT SEND LOGIN DETAILS

APPLICATIONS: dash

ROLES	DESCRIPTION	LEVEL	OFFICES
Brokerage Admin	Brokerage Admin	<a href="#">Manage Role</a>	None
Company Data Entry	Company Data Entry	<a href="#">Manage Role</a>	None
Finance Management	Finance Management	<a href="#">Manage Role</a>	None
Listing Coordinator	Listing Coordinator	<a href="#">Manage Role</a>	None
Listing Data Entry	Listing Data Entry	<a href="#">Manage Role</a>	None
Office Manager	Office Manager	<a href="#">Manage Role</a>	None
Read Only	Read Only	<a href="#">Manage Role</a>	None
Resource Manager	Resource Manager	<a href="#">Manage Role</a>	None
Resource Manager w/ Security Administration	Resource Manager w/ Security Administration	<a href="#">Manage Role</a>	None
Sales Agent	Sales Agent	Office <a href="#">Manage Role</a>	0001 - 7915 Stone Creek Dri..., Chanhassen
Sales Agent (read only)	Sales Agent (read only)	<a href="#">Manage Role</a>	None
Transaction Coordinator	Transaction Coordinator	<a href="#">Manage Role</a>	None

The **Assign Security Role** window displays.

- 36. Determine if you would like to assign the individual the security role for the entire company, or select offices.
- 37. To assign to select office(s), click to pick the office(s).
- 38. Click **Apply**.

You will be brought back to the **Security** tab.

Assign Security Role

ROLE: Read Only

Entire Company *Automatically grants access to any office added in the Future*

Select Offices **36**

OFFICES

- 0002 - 332 E. County Road D..., St Paul
- 0004 - 11812 Wayzata Blvd..., Minnetonka
- 0008 - 12390 Sherburne Ave..., Becker
- 0012 - 4600 W. 77th Street..., Edina
- 0013 - 324 Broadway Suite 1..., Alexandria

**37**

SELECT ALL

SELECTED OFFICES

- 0001 - 7915 Stone Creek Dri..., Chanhassen

Remove all

Cancel **38** → Apply

39. Click **Other** to move on.

Cancel Other >>



Other Tab:

- 40. Enter the person's other information into the appropriate fields.
- 41. Click **Review** to move on.

Essentials ✓ | Positions ✓ | Profile ✓ | Media ✓ | Security ✓ | **Other ✓** | Review

STARTED IN REAL ESTATE

EDUCATION

PREVIOUS OCCUPATION

BIRTH DATE

RECRUITED BY

GENDER  Male  Female

HOME ADDRESS .....  
COUNTRY

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE/ PROVINCE

ZIP/POSTAL CODE

EMERGENCY CONTACT .....  

NAME	PHONE NUMBER	PRIMARY
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>

INSURANCE .....  

INSURANCE TYPE	EXPIRATION DATE
<input type="text" value="-- SELECT --"/>	<input type="text" value="mm/dd/yyyy"/>

ADDITIONAL INFORMATION .....  

ATTRIBUTE	VALUE
<input type="text"/>	<input type="text"/>

41

### Review Tab:

The Review tab allows you to review the information entered prior to submitting the person record.

- 42. Edit any section by clicking the pencil.
- 43. Click **Finish** to save the information.

A confirmation displays, letting you know that the person has been successfully added.

ADD A PERSON

Essentials ✓ Positions ✓ Profile ✓ Media ✓ Security ✓ Other ✓ Review

▶ Essentials

▶ Positions

▼ Profile

DESIGNATIONS

LANGUAGES SPOKEN

- English

SPECIALIZATION

-----

Remark

LANGUAGE	TYPE	DESCRIPTION
----------	------	-------------

▶ Media

▶ Security

▶ Other

Cancel 43 → FINISH

Refer to the **Dash Security Roles Defined** document for information about each of the Security Roles in dash.