



RealGeeks

SETUP & TRAINING PLAN

Interactive webpage version of PDF available at:
onboarding.realgeeks.com/next-steps-rgsb

ONBOARDING PORTAL:
onboarding.realgeeks.com

CONTACT US:
onboarding@realgeeks.com

1

KICK-OFF CALL

Time to complete: 30 mins ☐

Connect with an Onboarding Advisor to discuss your MLS approval instructions, training opportunities, and schedule your website launch.

Your Onboarding Advisor can answer any questions you have to help get you up and running as soon as possible!

**Your Kick-Off call is typically scheduled during your sign-up process. Please contact us if you are unsure of your Kick-Off call date.*

2

MLS APPROVAL

Time to complete: 1-14 Days ☐

MLS Approval is required to display listings on your website. Follow the instructions provided during your Kick-Off call to obtain approval with your MLS board(s).

To get up and running as soon as possible - complete steps 3 & 4 while waiting for approval.

3

WEBSITE SETUP

Time to complete: 25 mins ☐

You're working with a third-party site designer to set up your website. Please follow all instructions they send.

To start your website set up the following form must be completed: [SITE SETUP INFORMATION FORM](#)

- Select the \$250 essentials package
- There should be a spot for a promo/coupon code where you will enter "RGROCKS"

Need help with the information form? Contact us!

4

CRM SETUP

Time to complete: 30 mins ☐

Set up CRM: leads.realgeeks.com → Complete Setup Wizard → Complete Checklist

Download the CRM App from the App Store or Google Play to use your CRM on the go.

Once set up, **UPLOAD YOUR CONTACTS** with help from our **suggested interactive 30-minute training sessions:**

- ☐ [Upload Your Contacts and Generate Opportunities](#) ☐ [Identify Leads Faster with Organization](#)



5

WEBSITE LAUNCH

Time to complete: 15 mins ☐

Make your website available to the public with assistance from a member of our team during your Go Live call.*

You MUST have MLS approval before going live. Once you have been approved, if you would like to launch your website on your own, contact us for instructions.

**Complete once your website has been setup. Go Live call is scheduled during Kick-Off call. Please contact us if unsure of Go Live call date.*

Additional Resources

LIVE Product Walkthroughs

In depth, step-by-step overviews of the platform (~1 hour long). Watch the recordings anytime.

Real Geeks Support Center

Our searchable knowledge base includes articles, tutorial videos, and step-by-step instructions.

Facebook Mastermind Group

Our official user community - Connect, collaborate, and discuss with other Real Geeks users.