Daily Checklist

Susan Cook
Stacia Thompson
Acknowledgments

The author(s) gratefully acknowledge the assistance of the following individuals in the creation of this course:

Norma Vranken
Antoinette Perez
Rose Jamison
Mary Cook
Cheryl Studer
Paula Hoeft
Mimi Hagan
Rita Landry
Michelle Heidt
Jo Lynn Bozer

NOTICES

While Keller Williams Realty International (KWRI) has taken due care in the preparation of all course materials, we cannot guarantee their accuracy. KWRI makes no warranties either expressed or implied with regard to the information and programs presented in the course or in this manual.

This manual and any course it’s used as a part of may contain hypothetical exercises that are designed to help you understand how Keller Williams calculates profit sharing contributions and distributions under the MORE System, how Keller Williams determines agents compensation under the Keller Williams Compensation System, and how other aspects of a Keller Williams Market Center’s financial results are determined and evaluated. Any exercises are entirely hypothetical. They are not intended to enable you to determine how much money you are likely to make as a Keller Williams Licensee or to predict the amount or range of sales or profits your Market Center is likely to achieve. Keller Williams therefore cautions you not to assume that the results of the exercises bear any relation to the financial performance you can expect as a Keller Williams Licensee and not to consider or rely on the results of the exercises in deciding whether to invest in a Keller Williams Market Center. If any part of this notice is unclear, please contact Keller Williams’ legal department.


Copyright notice

All materials are copyright 2008 Keller Williams Realty International.

No part of this publication and its associated materials may be reproduced or transmitted in any form or by any means without the prior permission of Keller Williams Realty International.
# Table of Contents

<table>
<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>3</td>
</tr>
<tr>
<td>Task #1: Confirm Backup</td>
<td>4</td>
</tr>
<tr>
<td>Task #2: Open MYOB and Verify Data</td>
<td>5</td>
</tr>
<tr>
<td>Task #3: Review/Print To Do List</td>
<td>9</td>
</tr>
<tr>
<td>Task #4: Check KW Email Account</td>
<td>10</td>
</tr>
<tr>
<td>Task #5: Verify System and Data Files</td>
<td>12</td>
</tr>
<tr>
<td>Task #6: Prepare for Backup</td>
<td>13</td>
</tr>
</tbody>
</table>
Overview

Checklists are the key to keeping track of the various tasks you are responsible for. Be sure to download the daily checklist attachment and print it out. This is a handy tool to keep track of your required daily tasks.

The front of the checklist contains your required tasks for the beginning and end of the day.

The back of the checklist contains an area for notes regarding the Greensheets and Disbursement Authorizations you enter during the day, the number of contract updates that were made (either closed or fell off), the listings entered, the new associates entered, and the associate updates made. Use the comment section to notate items that you may need to reference at a later time.
Task #1: Confirm Backup

<table>
<thead>
<tr>
<th>Task/Steps</th>
<th>Application</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CONFIRM BACK UP</td>
<td></td>
<td>☐</td>
</tr>
<tr>
<td>✗ EVERY MORNING, review the backup log and confirm that the backup completed successfully.</td>
<td>Backup Software</td>
<td></td>
</tr>
<tr>
<td>✗ Put the backup in a safe, secure area.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Every morning, review the backup log and confirm that the backup completed successfully.

Where do you keep your backup?

Keep the backup in a safe, secure area. Always take a redundant backup file with you when you leave at the end of the day.
**Task #2:**

Open MYOB and Verify Data

2. **OPEN MYOB© AND VERIFY YOUR DATA**
   - In MYOB Setup – Preferences – Security make sure that the last item “Prompt for Data Verification when Opening” is checked.
   - Whenever MYOB is opened and you are prompted to Verify Data, click Yes to run the data verification program. If you find an error in your data, contact MYOB© Technical Support (for FREE support) or contact KWMCAngel@kw.com for help.

---

**Step 1**

Click MYOB on your desktop.

---

**Step 2**

Click Open.
Task #2: Open MYOB and Verify Data

Step 3

Double click your data file name.

![Open dialog box]

Step 4

Enter your User ID. Click OK.

![Sign-on dialog box]

NOTE: A password is not required. It is recommended to have one if your computer is not kept in a locked office.
Task #2: Open MYOB and Verify Data

Step 5

Always verify your data.

NOTE: This verification screen will only appear the first time you log into MYOB each day.

Step 6

Click OK.
Task #2: Open MYOB and Verify Data

Step 7

Once all of the data has been verified, click OK.

NOTE: If data errors are found, please call MYOB© Technical Support at 1-800-836-1812 and have your MYOB Serial number and customer code available.
Task #3: Review/Print To Do List

Step 1

Once MYOB is opened, the To Do List appears.

Step 2

Click each tab and click Print. Once each task list has printed, press ESC on your keyboard to return to the MYOB Command Center.
Task #4: Check KW Email Account

4. CHECK KW® EMAIL ACCOUNT
   - Three times a day check your klrw[MC#]@kw.com account for important email from KWRI to the Market Center.

Three times a day, check your klrw[MC#]@kw.com account for important email from KWRI to the Market Center.

Email can be checked in Outlook, if set up, or by logging into KW Webmail at http://webmail.kw.com.
Task #5: Verify System and Data Files

5. VERIFY SYSTEM AND DATA FILES
   □ Click Setup – Verify System and Data Files at end of day just before you leave the MC. This ensures that your daily tape backup will include a valid copy of WinMORE. If an error message is displayed, contact KWMCAngel@kw.com immediately.

Step 1

Click WinMORE on your desktop.

Step 2

Click Set Up and select Verify System and Data Files.

Step 3

You should receive a dialogue box stating the WinMORE System and Data files are ok. Click OK.

NOTE: Always verify your WinMORE files before you leave for the day. This ensures your daily tape backup will include a valid copy of WinMORE. If an error message is displayed, contact KWMCAngel@kw.com immediately.
Task #6:
Prepare for Backup

6. PREPARE FOR BACK UP
☐ Take last night’s backup with you, or place in a safe and secure place.


Questions?
Please email KWMCAngel@kw.com