How do you move up to Profit Power?

First, Discuss with Lantrax staff how you use BOS now.

[___] Enter accepted offers and close sales transactions.

[___] Calculate agent commissions using commission plans.

[___] Pay agents with checks and/or direct deposits.

[___] Maintain agent accounts receivable.

[___] Report closed sales a franchise.

[___] Interface with a financial accounting system.

Second, Identify useage and company size

[___] Count of agents and offices.

[___] Company size in terms of transaction units and volume.

[___] Identify central office closing staff.

[___] Identify other central office data entry and reporting users.

[___] Identify branch level users and how they use BOS.

Third, Define with Lantrax staff:

[___] Which Lantrax Back Office program is appropriate for your company:

    [___] Profit Power Enterprise (PPE).

    [___] Profit Power Professional (PPP).

[___] General Training Schedule and Estimated Go Live date

[___] Evolve and Agree to the Lantrax Service and License Contract deliverables and costs.

Fourth, Initiate Training and Installation process through completion and go-live.

[___] Lantrax and Brokerage Staff schedule and complete training content, timing, and participants.

[___] Customer provides details and Lantrax sets up varous processes for customer testing such as:

    [___] Check printing and Direct Deposit processing

    [___] Commission plan definitions and assignment

    [___] Agent account item definitions and assignment

[___] Lantrax training staff online meets with users to learn and complete:

    [___] Transaction types definitions and entry procedures

    [___] Referral types and entry procedures

    [___] Time to time BOS to Profit Power agent roster, outside companies, closed sales data conversions for testing.

    [___] Closing procedures including verification steps and commission payment processing.

[___] Customer Go Live on PPP or PPE

    [___] Lantrax staff clears out all practice data and re-converts closing data from BOS to Profit Power

    [___] Customer staff begins all new data maintenance and business processing in Profit Power

    [___] Customer stops entering new business into BOS

    [___] BOS access is provided by Lantrax Cloud for historical production reporting & marketing, obtaining past transaction details including buyer-seller-commission details.