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Important: Independent Sales Associates have the option to complete their affiliation documents in the convenience of their own home, remote location or with the assistance of the office administrator in the branch of affiliation.

HOW TO GENERATE YOUR DOCUMENTS

1. Using any device, preferably one with a larger screen, log in to your personal email. You should have received two emails from the Automated Agent Affiliation system with agentaffiliation@nrtllc.com address. One of the emails has the link to the portal, the other – contains your personal pin;

   Coldwell Banker Affiliation: Agent PIN - Dear Agent, Below is your personal 4-digit PIN which you had previously selected. PIN: 1234 This PIN

   Coldwell Banker Affiliation: Portal Link - Dear Agent, Congratulations on your decision to affiliate with Coldwell Banker. In order to ensure a

2. Open the email with the Portal Link and click on the link provided in the body of the email;

   Dear Agent,
   Congratulations on your decision to affiliate with Coldwell Banker. In order to ensure a positive and smooth You will be receiving a separate email with your 4-digit personal PIN which is needed to access the portal.

   https://affiliation.cbhomes.com/launchpad/WZjvQU2tNiU7FeiYS63g

   Once you’ve entered the Affiliation Portal, which has been designed specifically for Independent Sales Associates accurately and thoroughly completed the affiliation process.

   Prior to submitting your documents, it is highly recommended that you review and verify the information that

3. The link will take you to the screen below, please enter your personal pin and click Login;

   Please enter your PIN

   PIN

   Login

   - If you don’t remember your pin, please refer to the second email in your inbox containing your personal pin.

   Dear Agent,
   Below is your personal 4-digit PIN which you had previously selected.

   PIN: 1234

   This PIN is necessary to enter the Affiliation Portal in order to complete

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4. The system will take you to the Welcome screen where you will see a welcome note from the Branch Manager as well as his/her contact information should you have any questions;

- On top of the screen you will see four tabs that can be used anytime during the process. The tabs will take you through the:
  - Welcome Page with a Welcome message from the Branch Manager
  - Personal Information – where you will enter all your personal information to create your affiliation documents
  - Affiliation Packet – where you will be able to view your affiliation documents
  - Help – resources, FAQs, and contacts regarding the affiliation process;

5. Click on the Continue button in the bottom of the welcome page, or click on the Personal Information tab on the top of your page.
6. On the Personal Information page, complete the Agent Affiliation Form. Fields highlighted with the red asterisks must be completed in order to proceed with the affiliation process;

**Important:** In case any of your Basic Information that was entered in the office is incorrect, you will need to cancel this process and contact the branch office to initiate the process again.
7. Once the form is completed, click on the Submit button to save the form, then click on the Generate Packet button which will create the rest of the affiliation forms;

![Submit and Generate Packet buttons]

8. A confirmation request will pop up. Click the Generate Packet button again confirming that the personal information is correct;

![Affiliation Packet Generation]

9. After a successful submission, your page will display the following note:

![Affiliation Process Status]

- At this point you can sign out of the portal and comeback at a later time to read and sign your documents, or you can go forward with the process by clicking on the Affiliation Packet tab on top. Please note it will take 2-3 minutes for the Affiliation Packet to fully generate.
- If you choose to continue, click on the Affiliation Packet tab in about 3 minutes. Clicking the tabs will also refresh your screen.
10. If you have logged out of the system, use the link in your email to come back in to the Automated Agent Affiliation Portal. The system will take you to the Affiliation Packet Documents screen under the Affiliation Packet tab.

11. Please go through all documents and perform appropriate action for each: Sign, Read, Print and Upload as indicated.

You can move through the documents by double-clicking on each document, or you can use the navigation buttons on the bottom of the list;

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12. Each document is displayed in PDF format to the right of the screen. You can easily read, zoom, print and save every document on any device or browser. Just hover over the document with the mouse and the control panel will display on the document;

13. The documents that require a signature will have a Sign Document button on the bottom of the document. After reading through the document, click on the Sign Document button and move to the next document.

After clicking the Sign Document button you will see the following message:

The system will **NOT** automatically move you to the next document; you must double click on the document, or use the navigation buttons in the bottom of the screen;

Hint: You may need to enlarge the viewing screen to maneuver more easily.

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14. Once all documents are signed, acknowledged, or printed, click the **Submit** button which will send the documents to the branch office of your affiliation.

![Submit button](image)

If you missed a signature or document upload, the Packet will not submit. Go back and complete the missing action and Click Submit again.

A confirmation request will come up asking you to confirm your submission. Click the **Submit Packet** button if you wish to continue with the affiliation, or click the **Cancel** button to stop the process.

![Submit Packet button](image)

15. You will receive an email once your documents are reviewed and signed by the Branch Manager. At that time, you can log into the system again using the link in your email to view, download or print signed and finalized documents.

![Affiliation Process Status](image)

16. Congratulations! You have completed, generated and submitted your affiliation packet documents. You can log out of the system and close your browser window now.

![Sign Out](image)

**Important:** If you were asked to print and bring any form(s) to the office, please be sure to do so as they may be required to finalize the affiliation.

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