Assistant Access Program Guide

The Assistant Access Program

The Assistant Access Program provides structured access for Admins, Assistants, or Transaction Coordinators who are supporting Agents and teams. It ensures secure, role-based access to platforms and systems.

Any Agent or team can request access for their Assistant(s), whether licensed with eXp Realty in the US and Canada, Commercial, or Referral, or unlicensed, based on their operational role.

What are the Assistant Access Tiers?

Costs apply only to **unlicensed** Assistants. Licensed Assistants are already covered under their monthly cloud brokerage fee and are not subject to these additional charges. An exception applies when a licensed Assistant needs a separate login distinct from their Agent account.

After July 15, 2025, Agents can choose access to platforms for their Assistants. The tiers are as follows:

1. **Marketing Assistant** – $20 USD/$30 CAD monthly
   Essential marketing tools access for eXp Agents.
   Access: Okta, DuoCircle (eXp email), Slack, Coda, Canva
2. **Transaction Assistant** – $30 USD/$40 CAD monthly
   Complete transaction management toolkit.
   Access: Okta, Skyslope, DuoCircle (eXp email), Slack, Coda, Canva
3. **Business Assistant** – $40 USD/$50 CAD monthly
   Full-service business management solution.
   Access: Okta, Skyslope, DuoCircle (eXp email), Slack, Coda, Canva, CRM of choice

Agents

Complete Application Form:

The first step in requesting TC/Assistant access is to complete the **application** form. **The Agent must be fully onboarded and active before completing this form.**

What to know:

- The form must be completed for each TC/Assistant. If the Agent is hiring more than one TC/Assistant, a separate form must be completed for each.
- **Teams**: The form only needs to be completed once by the Team Lead or the TC/Assistant requesting access. The TC/Assistant will then be granted access to all team members' files on the Transaction and Business Tiers.
  - The form can be filled out by the Agent, Team Lead or TC/Assistant.
  - The monthly fee for an unlicensed TC/Assistant will be charged to the Agent or the Team Lead and will be charged after all parties sign the agreement. TC/Assistants who are licensed with eXp (eXp email) will not have a fee.
  - No exceptions will be made for TC/Assistants working on getting their licenses.

What to expect after filling out the form?

Once the form is submitted, the Agent will receive an email within 24-48 business hours with the subject: *eXp Realty - US - Agent and TC/Assistant Cloud Brokerage Access Agreement*. This contract will be completed and signed by the Agent and then signed by the Support Personnel, TC, or Assistant. Once the contract is signed, it will take 24-48 business hours for the request to be completed. The Agent and TC/Assistant will get a confirmation email once their request has been fulfilled.

Where can I find the Agent ID number?

The Agent ID number can be found in Enterprise under "My Business," then "Agent Profile." It will typically be 5-6 digits long.

Can I continue to receive notifications from Skyslope?

A secondary email can be added to their account by clicking their name in the top right corner when logged into Skyslope Suite, then click My Account. Do keep in mind that this only allows them to send a password reset and other notifications to this secondary email, however, it does not act as a secondary login email.

Will my ISAs need Assistant Access?

Yes, if they log into your CRM or Referral site, they will need Business Assistant access and an agreement signed.

TC/Assistant Access:

What to know:

- TC/Assistants will only get access and a unique login to the platforms listed in the [Tier](#) selected by the Agent or Team Lead.
- TC/Assistants who are licensed with eXp and have an eXp Realty email will not have a fee.
- A new TC/Assistant will not be able to see files created in an Agent's account before the TC/Assistant was added. However, the Agent will be able to add the TC/Assistant to the file as a co-Agent, allowing them to view files added before the TC/Assistant was added.

How long will it take to receive access?

Please allow 2- 4 business days after the contract is signed and completed for access to be granted.

How will I know if my request has been processed?

The Agent and TC/Assistant will receive a confirmation email once the request has been processed, as well as welcome emails from each platform. All platforms will be accessible through a single sign-on application called OKTA. OKTA uses two-factor authentication, which allows users to access multiple applications with a single set of login credentials.

Will my new TC/Assistant be able to see files uploaded before access was granted?

No, a new TC/Assistant will not be able to see files added to an Agent's account before they were added. They will need to be added as a co-Agent for visibility. Any transaction the Agent inputs (before or after access is granted) will require the TC/Assistant to be added as a co-Agent. Only transactions that the TC/Assistant inputs will be automatically visible.

Removing TC/Assistant Access:

To remove a TC/Assistant from having access to any platform and/or to stop the monthly fee, complete this form and click "Removing TC/Assistant Access." A severance form will be emailed to the Agent. Once signed, TC/Assistant access will be removed, and billing will be stopped within 7-10 business days. Transferring to another brokerage does not automatically stop monthly billing.

Changing TC/Assistant Access Tier:

You may upgrade to the next tier at any time. You may move down a tier once every 6 months. No prorations or refunds are available for a tier if an Agent decides to downgrade the TC/Assistant. The new tier will be billed upon activation. Please complete this form to change the access tier.

In addition to agreeing to abide by the eXp Realty CRM of Choice User Terms and Conditions, CRM (Business tier) can be changed once every 12 months.

Domestic Partnership

If the Team does not have an Assistant:

- The Secondary Member will get an additional Skyslope login with the role of Limited TC. This means that the Secondary Member can manage all of the files on behalf of the Primary Member. This ensures all of the production is in the Primary Member's name. The Secondary will need to log into the Assistant Skyslope account to manage and create files.
- A monthly fee will not be assessed in this situation.

If the Team has an Assistant:

- If there is an Assistant for the Domestic Team, please fill out the Request Form at the top of the page to request access for the TC/Assistant only. The Secondary Member will get an additional Limited TC Skyslope account in addition to the TC/Assistant's account.
- If the TC/Assistant is unlicensed, the monthly fee will be billed to the Domestic Partnership's primary member.

TC/Assistant

What to Know:

- The unlicensed TC/Assistants will get an OKTA account with eXp email alias following the format first.lastname.assist@exprealty.com. Licensed TC/Assistants will use their exp email address to log into their own OKTA and will have additional access to the Agent's accounts.
- TC/Assistants can create Skyslope files on behalf of the Agent.
- TC/Assistants cannot see or manage any file they did not themselves create for the Agent unless they are added as a **co-Agent** on the file.
- TC/Assistants for Mega Teams will see all files created in the team office immediately and will not need to be added as a co-Agent.
- If the TC/Assistant starts the file, both the Agent and TC/Assistant have access.
- There is no limit to the number of co-Agents that can be added to a file, and it will not affect how the commission is paid out.
- If the TC/Assistant does not have access to the correct libraries in Skyslope, please reach out to Support@skyslope.com
- The TC/Assistant does not contact Support on behalf of the Agent. The Agent can contact Skyslope support directly:
- via chat https://skyslope.com in the lower right corner
- email support@skyslope.com
- call 800-507-4117

Brokerage Affiliation

Licensed TC/Assistants **cannot** be affiliated with other brokerages. If a TC/Assistant is licensed, they must transfer their license over to eXp Realty, eXp Referral, or eXp Commercial.

Assistants must follow applicable rules and regulations for unlicensed coordinators in each state.

TC/Assistants can also contact their DRE and request that their license be moved to an inactive or non-active state. If the TC/Assistant is licensed and sponsored by a non-competing brokerage (a Referral-only brokerage), please email agentservices@exprealty.net to discuss options.

I am a new agent looking for TC work. Should I request TC/Assistant access before starting to work with an Agent?

No, a licensed Agent who is looking to start TC/Assistant work should not fill out the TC/Assistant Access Request Form until they have an Agent to work with.

Who should I contact for information on learning how to complete contracts and general TC/Assistant duties?

A new TC/Assistant should contact their state broker for information on how to become a TC/Assistant or how to complete contracts. https://exp.world/infosphere

About the Platforms:

Menu of Services

The following is a list of eXp platforms that the TC/Assistant will get access to based on different tiers. The Agent will select the tier prior to set up.

OKTA

All platforms will be accessible through a single sign-on application called OKTA. OKTA uses Single Sign-On, which allows users to access multiple applications with a single set of login credentials.

DuoCircle (exp email)

If the TC/Assistant is unlicensed, then they will receive an email firstname.lastname.assist@exprealty.com (as an example for a US Assistant) and emails will automatically forward to the email address provided.

Slack

TC/Assistants will be added to the eXp Agent Community workspace and will be able to communicate with Agents, advisors, and staff.

Coda

Coda is a collaborative, cloud-based document and workspace platform—used internally by eXp Canada to organize and share. Many eXp policies and procedures are found in Coda.

Canva

Canva is an online design platform that allows Agents to create beautiful marketing materials that are eXp-branded and easy-to-use templates. Agents can share projects easily in folders.

CRM of Choice

For US Realty Agents, eXp Realty's next-generation tech initiative is designed to give Agents the freedom to choose the customer relationship management (CRM) tool that best fits their business needs. Rather than defaulting to a single CRM for all Agents, eXp now offers a **flexible, opt-in model** that empowers Agents to select from three top-tier CRM platforms—**BoldTrail**, **Lofty (formerly Chime)**, and **Cloze** If the Business Tier is selected, the Agent agrees to abide by the eXp Realty CRM of Choice User Terms and Conditions, and the CRM can be changed once every 12 months.

For Canadian Agents, the CRM of Choice is not available; however, TC/Assistant will receive CRM access.

For Commercial Agents, CRM of Choice is not available.

Pricing

Monthly Fees

The pricing for unlicensed TC/Assistants or TC/Assistants with an inactive license is as follows:

Marketing Assistant – $20 US/$30 CAD monthly

Essential marketing tools access for eXp Agents and Commercial Advisors.

Access: Okta, DuoCircle (eXp email), Slack, Coda, Canva

Transaction Assistant – $30 US/$40 CAD monthly

Complete transaction management toolkit.

Access: Okta, Skyslope, DuoCircle (eXp email), Slack, Coda, Canva

Business Assistant – $40 US/$50 CAD monthly

Full-service business management solution.

Access: Okta, Skyslope, DuoCircle (eXp email), Slack, Coda, Canva, CRM of choice

Payment Options

Option 1: Per-Agent Fee of the selected Tier Access billed to the Agent

Best suited for Assistants who:

- Are working with three or more agents,
- Are working for a Team Leader with team members,
- Supports Agents who will pay the monthly fee.

➤ Cost may vary depending on the tier selected—see the [Monthly Fees for unlicensed agents](#).

Access is nationwide, so one Assistant can support agents in any state (like MN, TX, FL, etc.) using the same login.

Option 2: Annual Vendor Fee – $1,000 per Transaction Coordinator (TC) (paid $250/Quarterly)

Best suited for Assistants who:

- Support three or more eXp agents in Realty or Commercial, no per-agent fee applies once the login credentials are created
- Want to be billed directly so they can bill agents at a lower individual rate, or absorb the fee in their business model

Access is nationwide, so one TC can support agents in multiple states (e.g., MN, TX, FL, etc.) using the same login.

TC/Assistants licensed with eXp Realty, Referral, or Commercial do not pay the Monthly Fee or Vendor fee.