

**Oakview Onboarding Information form**

Welcome to Oakview. We are glad you are here and want to get you up and running as soon as possible. Please complete the following information so we can get you all set!

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| --- | --- |
| NMLS Username & Password | If you would like us to process your transition in NMLS |
| Employment End/Start | Let us know end date for your previous employment and start date with Oakview for you NMLS Record. |
| Preferred Name for Website/OHL Email | (Ie James Smith III may want to go by Joe Smith on the website/email signature) |
| Preferred email address: | xxxxx@oakviewHL.com |
| Headshot Picture for Website | I have a square headshot that I will email to [robm@oakviewhl.com](mailto:robm@oakviewhl.com) for use on the website and other marketing.  I need a professional Headshot |
| **Social Media Pages you would like us to connect to our CRM so regular posts can go out for you.**  **We can also clean and refresh your pages for you to review/approve.** | |
| **Facebook:**  **(Select one option)** | I have a personal FB page and you can connect it to CRM and refresh it.  I have a personal FB page but do not want it connected or refreshed for Oakview.  I do not have a FB page nor do I want one.  I do not have a FB page, let me know about setting one up. |
| FB link  (if you have one): |  |
| FB Login: |  |
| FB PW: |  |
| **Linked In:** | I have a personal LI page and you can connect it to CRM and refresh it.  I have a personal LI page but do not want it connected or refreshed for Oakview.  I do not have a LI page nor do I want one.  I do not have a LI page, let me know about setting one up. |
| Linked In. Page Link: |  |
| LinkedIn Username: |  |
| Linked In PW: |  |
| **Instagram:** | I have a personal IG page and you can connect it to CRM and refresh it.  I have a personal IG page but do not want it connected or refreshed for Oakview.  I do not have a IG page nor do I want one.  I do not have a IG page, let me know about setting one up. |
| Instagram Page Link: |  |
| Instagram Username: |  |
| Instagram PW: |  |
| **Twitter:** | I have a personal TW page and you can connect it to CRM and refresh it.  I have a personal TW page but do not want it connected or refreshed for Oakview.  I do not have a TW page nor do I want one.  I do not have a TW page, let me know about setting one up. |
| Twitter Page Link: |  |
| Twitter Username: |  |
| Twitter PW: |  |

Authorizations

(I can change these anytime by sending email.)

|  |  |
| --- | --- |
|  | I authorize OHL Mktg to “Follow” the OHL/OVC business pages on my behalf |
|  | I authorize OHL Mktg to like Oakview business page posts from my account(s) |
|  | I authorize OHL to publish branded content to my pages using the Oakview/Brand360 CRM if able. |
|  | **Because of the actions above, I will often see Posts from Oakview appear in my “Timeline” on my pages. I am encouraged to “like” and “share” those posts with others who are my “friends”, or “follow me” etc. This will give me higher visibility on the platform.**  **Thanks!**  **We are working hard to make your social pages work for you and Oakview!** |
|  | **Once you are all set with social pages and your email signature, ask us about additional advertising you can do at your option and cost on our platform.** |