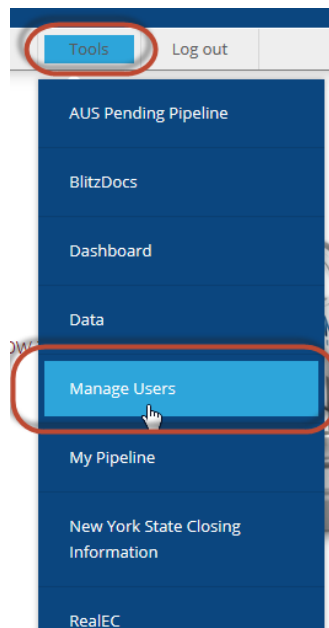




## **Utilizing the “Manage Users” Tab within the Broker Portal**

- ❖ The assigned Administrator for each Broker account has the ability to add user accounts for access to the REMN Wholesale Broker Portal
- ❖ After logging into the Broker Portal, the Administrator clicks on “Tools” and then scrolls down to “Manage Users”





- ❖ Once on the “Manage Users” screen, Choose the “Add New User” tab

## Manage Users

**Add New User** **Copy** **Save** **Show** 10 **entries** **Search:**

ID	First Name	Last Name	Email	Impersonate	Edit User
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- ❖ Fill in the required information which is marked with a red asterisk \*. An initial password is also required.

Add New User ×

Manage Users

User Information

\*First Name

\*Last Name

\*Email

Password

Password

Password Again

- ❖ Below the new user's name and password fields, the Administrator **MUST** click on the + sign in the "Add Broker" column to indicate the Broker and/or Branch Office that the new user will be associated with. If the user is not associated with a Broker's office, they will not be able to gain access to the Portal.

Associate Brokers Below

Copy Save Show 10 entries Search:

ID	Broker	Add Broker
204949	Test Broker	+

Showing 1 to 1 of 1 entries Previous Next

List of Associations:  
Clear List

Other

- ☐ Can manage users
- ☐ Can See all Brokers
- ☐ Can Set Broker Compensation
- ☐ No Lock Access
- ☐ User is disabled

Notes

Save

- ❖ Once the Broker Association has been selected it will appear in the “List of Associations”

Associate Brokers Below

Show  entries Search:

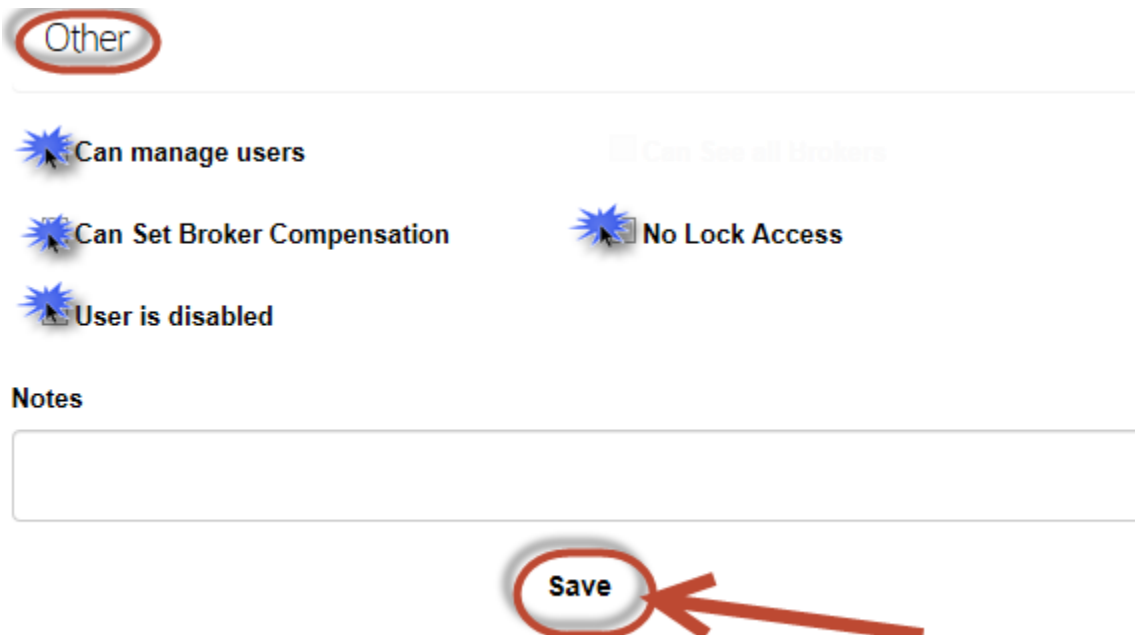
ID	Broker	Add Broker
204949	Test Broker	+
<input type="text"/>	<input type="text"/>	<input type="text"/>

Showing 1 to 1 of 1 entries

Previous Next

List of Associations: 204949  
Clear List

- ❖ In the “Other” section, the Administrator can choose the level of access for the new user. The Broker can choose to allow a user to “manage users” or “set the Broker Compensation”. The Broker can also choose “No Lock Access” and even “Disable” a user if necessary. When all the above steps have been completed, the Broker will click on “Save” to finalize adding the new user or making any changes to the user’s access.

A screenshot of a web interface for user management. At the top, the word "Other" is circled in red. Below it, there are five checkboxes, each preceded by a blue star icon: "Can manage users", "Can Set Broker Compensation", "User is disabled", "Can See all Brokers", and "No Lock Access". Below these checkboxes is a text area labeled "Notes". At the bottom, a "Save" button is circled in red, with a red arrow pointing to it from the right.

Please contact your Account Executive if you require any further assistance.