MRED User Privileges Policy

Office Types

Appraiser

An office that appraises real estate ONLY and DOES NOT list and sell real estate. The following are the only user types that can be assigned to an Appraiser office type: (see definitions below)

> Appraiser
> Appraiser Assistant
> Designated Appraiser
> Appraiser Secretary

Realty

This is any office with an active real estate license that lists and sells real estate. If this type of office is selected, there cannot be ONLY Appraisers as users; the office must have active Realtor users to be a Realty office. The following (in alphabetical order) are the only user types that can be assigned to a Realty office type: (see definitions further below)

> Appraiser
> Designated Realtor
> Leasing Agent
> Licensee
> Office Manager
> Office Secretary
> Personal Assistant
> Realtor

User Types (in alphabetical order)

Appraiser

This user type has an active appraiser license.

> Default Permissions for an Appraiser:

>> Use custom reports
>> Hotsheets
>> Search off-market listings
>> Access Financial Tools
>> Search tax records
>> Enable advanced Area Market Survey (AMS) search
>> Access Forms
>> Access My Clients
>> Search active listings (requires search off-market listings)
>> Access My Service Partners
>> Email listings as attachments
>> Infosparks
>> Access CMA

Appraiser Assistant

This user type works on behalf of one Appraiser or a group of Appraisers. They will be given their own ID number but will not be able to sign into connectMLS as themselves, but will select from a drop-down list upon whose behalf they are signing in for - in order to do this,

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they need to have at least one Appraiser set them up as an assistant to have access to connectMLS. Once signed in, they will have available the same permissions as the Appraiser they are signing in on behalf of. **NOTE**: If only one (1) Appraiser adds the Appraiser Assistant ID as an Assistant, the AA ID will immediately be signed into connectMLS on their behalf. The only license an Appraiser Assistant can have is an Associate Real Estate Trainee Appraiser license. If they have any other active Appraiser license (Certified General Real Estate Appraiser, Certified Residential Real Estate Appraiser) they must join as an Appraiser.

Appraiser Secretary

This user type is for a person designated by an Appraiser to perform administrative duties for an appraiser. The designated person may not have an appraiser license, be actively seeking an appraiser license, or be undertaking appraiser training.

> Default Permissions for an Appraiser Office Secretary

> > Use Custom reports
> > Access Hotsheets
> > Search active listings
> > Search off market listings
> > Access Financial Tools
> > Search tax records
> > Enable advanced Area Market Survey (AMS) search
> > Access CMA
> > Infosparks
> > MLS Data Co-op
> > Realtors Property Resource (RPR)

Designated Appraiser

This user type has an active appraiser license and has been designated by ownership as the Responsible Member of the appraiser office. **There is only one Designated Appraiser per Appraiser office.** The default permissions for a Designated Appraiser are the same as the Appraiser.

Designated Realtor

This user type has an active real estate managing broker license and is designated by ownership as the Responsible Member of the real estate office. **There is only one Designated Realtor per Realty office.**

> Default Permissions for a Designated Realtor:

> > Use custom reports
> > Hotsheets
> > Open house/tours search
> > Add/Edit listings for own office
> > Add/Edit open house/tours for own office
> > Add/Edit open house/tours for own company
> > Add/Edit open house/tours for own office
> > Search off-market listings
> > Access Financial Tools
> > Search tax records
> > Enable advanced Area Market Survey (AMS) search
> > Access Forms
> > Search all company offices in Market Share
> > Access My Clients
> > Edit transactions for own company
> > Edit transactions for own Office
> > Company branding allowed – Branch office
> > Add/Edit own listings
> > Email statistical reports (AMS, Market Statistics, etc.)
> > Manage Office Teams

Search active listings (requires search off-market listings)
Access My Service Partners
Manage Company Teams
Post board messages to their agents
Cloud CMA
Infosparks
Access CMA
Add/Delete Broker Forms
Change company logo
Email Listings/Prospecting
Rental Beast
TrustFunds
Homesnap
MLS Data Co-op
City Info Pages
Realtor.com Professional search
ShowingTime
Share My Listings Widget (SMyL)
State and Association Forms
Realtors Property Resource (RPR)

The Designated Realtor that is assigned to the main office of a Company also would get the following permissions in addition to the ones listed above:

Add/Edit listings for own company
Add/Edit open house/tours for own company
Search all company offices in Market Share
Edit transactions for own company
Company Branding allowed – Branch Office
Manage Company Teams
Change company logo

Leasing Agent

This user type engages only in residential leasing activities for which a license is required under State Law. Such activities include without limitation leasing or renting residential real property, or attempting, offering, or negotiating to lease or rent residential real property.

Licensed Leasing Agents must be sponsored and employed by a sponsoring broker.

Default Permissions for Leasing Agent:

Use custom reports
Hotsheets (rentals only)
Open House/tours search (rentals only)
Search off market listings (rentals only)
Access Financial Tools
Search tax records
Enable advanced Area Market Survey (AMS) search
Access Forms
Access My Clients
Add/Edit own rental listings
Email statistical reports (AMS, Market Statistics, etc.)
Search Active listings (rentals only)
Access My Service Partners
Cloud CMA
Infosparks
Access CMA
Email listings/prospecting

Licensee

This user type is an active agent who does not pay any Realtor© dues but are sponsored by an MRED Participant. The default permissions for a Licensee are the same as the Realtor.

Office Manager

This user type has an active real estate managing broker license and is designated by the Designated Realtor as having managing permissions for a real estate office. **There is only one Office Manager per Realty office.** The default permissions for an Office Manager are the same as the Designated Realtor.

Office Secretary

This user type is whom the broker has designated to perform administrative duties for a Realty office. Said person may be actively licensed as a Broker, Managing Broker, Leasing Agent, or Appraiser as long as the user ALSO has a user type that matches their license.

A Secretary in a holding company is not allowed but they <u>can</u> have a Personal Assistant ID.

<u>Default Permissions for an Office Secretary:</u>

> Use custom reports
> Hotsheets
> Open house/tours search
> Add/Edit listings for own office
> Add/edit open house/tours for own office
> Search off-market listings
> Search tax records
> Enable advanced Area Market Survey (AMS) search
> Access Forms
> Edit transactions for own office
> Add/Edit own listings
> Search active listings (requires search off-market listings)
> Add/Delete Broker Forms

The Office Secretary that is assigned to the main office of a Company also would get the following permissions in addition to the ones listed above:

> Add/Edit listings for own company
> Add/Edit open house/tours for own company
> Search all company offices in Market Share
> Edit transactions for own company
> Company Branding allowed - Branch Office
> Change company logo

Personal Assistant

This user type works on behalf of one Realtor or a group of Realtors. They will be given their own ID number but will not be able to sign into connectMLS as themselves but will select from a drop-down list upon whose behalf they are signing in for - in order to do this, they need to have at least one Realtor set them up as an assistant to have access to connectMLS. Once signed in, they will have available the same permissions as the Realtor they are signing in on behalf of. **<u>NOTE</u>**: If only one (1) Realtor adds the Personal Assistant ID as an Assistant, the PA ID will immediately be signed into connectMLS on their behalf.

A Secretary in a holding company is not allowed but they <u>can</u> have a Personal Assistant ID.

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Realtor

This user type has an active real estate broker license.

Default Permissions for a Realtor:

Use custom reports
Hotsheets
Open house/tours search
Search off-market listings
Access Financial Tools
Search tax records
Enable advanced Area Market Survey (AMS) search
Access Forms
Access My Clients
Add/Edit own listings
Email statistical reports (AMS, Market Statistics, etc.)
Search active listings (requires search off-market listings)
Access My Service Partner
Cloud CMA
Infosparks
Access CMA
Email Listings/Prospecting
TrustFunds
Homesnap
MLS Data Co-op
City Info Pages
Realtor.com Professional Search
ShowingTime
Share My Listings Widget (SMyL)
Realtors Property Resource (RPR)
State and Association Forms

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Association User Types

Association Administrator

User is the Association Executive Officer or Association Membership Supervisor.

Default Permissions for Association Administrator:

Use custom reports
Hotsheets
Open house/tours search
Add/Edit listings for own association
Add/Edit open house/tours for own association
Reset password for users
Search listings with HOLD status
View office details (admins)
View user details
View admin history
Search off-market listings
Access Financial Tools
Search tax records
Enable advanced AMS search
Access Forms
Access My Clients
Add/Edit own listings
Email statistical reports (AMS, Market Statistics, etc.)
Search active listings (requires search off-market listings)
Access My Service Partners
Cloud CMA
Infosparks
Access CMA
Email Listings/Prospecting
Add/Edit board messages
Add/Edit board links
Modify password expiration date

Association Staff

User is on staff at the Association.

Default Permissions for Association Staff:

Use custom reports
Hotsheets
Open house/tours search
Add/Edit listings for own association
Add/Edit open house/tours for own association
Reset password for users
Search listings with HOLD status
View office details (admins)
View user details
Search off-market listings
Access Financial Tools
Search tax records
Enable advanced AMS search
Access Forms

Access My Clients
Add/Edit own listings
Email statistical reports (AMS, Market Statistics, etc.)
Search active listings (requires search off-market listings)
Access My Service
Partners Cloud CMA
Infosparks
Access
CMA
Email Listings/Prospecting

NOTE: The following permissions can only be assigned with written authorization from the Association Executive Officer and can be assigned to either an Association Administrator or Association Staff:

Perform agent to agent transfer
Perform agent to office transfer

NOTE: The permission to Activate/Inactivate Offices and/or Users is granted to only ONE unique user ID per Association upon written authorization from the Association Executive. The user ID, created by MRED, is established for the purposes of activating or deactivating agents and offices under circumstances where waiting for the feed is insufficient.

There can be loss of the above privileges for failing to follow the Association Emergency Activation/Deactivation Privilege Policy