

Manage Licensees – Real Estate Firms/Branches

These instructions assume you have already created a SAW account and have linked your business license.

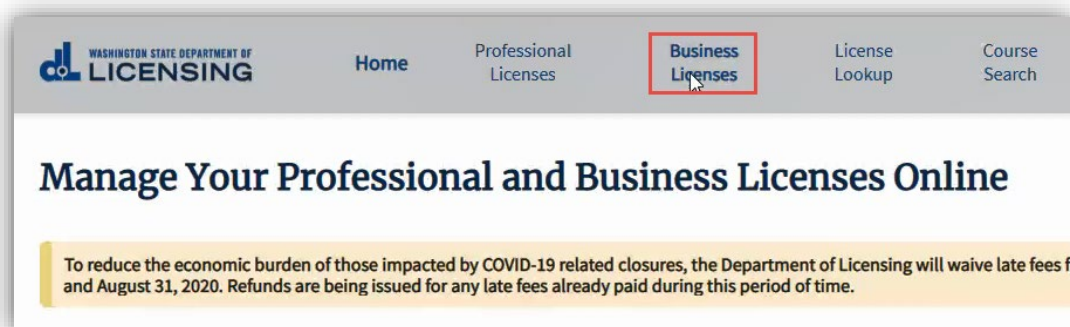
If you haven't yet done so, see the document [Create your user access to the Professional and Business Licensing System](#) for detailed instructions on these processes.

Before You Begin

- You'll need the license number of the licensee you want to add.
- The licensee's license must be in **inactive** status. If not in this status, the licensee must separate from their current firm.
- Don't use this process to add a Designated Broker to a firm or branch. Use the Replace Designated Broker process instead.

Invite a Licensee

1. **Click** Business Licenses link from the top menu of the Professional and Business Licensing Home page.



2. **Click** link in tile for business you want to add a licensee to at the Manage My Businesses page.

Manage My Businesses

[Barry Blueberry's Tattoo Shop](#)
barryblueberry@mailinator.com

UBI
632-023-652

[Barry Blueberry's Real Estate Firm](#)
barryblueberry@mailinator.com

UBI
601-555-412

3. **Click** link for license you want to add licensee to at the Business Licenses page.

Business Licenses

Barry Blueberry's Real Estate Firm

UBI: 601-555-412
Email: barryblueberry@mailinator.com
Business email: barryblueberry@mailinator.com
Business Phone: 555.555.5555
Primary Contact Name: Barry Blueberry
Primary Contact Phone: 555.555.5555

[Update business information](#)

Licenses		Administrator	Unsubmitted Applications	Sub
License	License Type	Expiration Date	License Status	Sub-status
20110834	Real Estate Firm	June 15, 2022	Active	None

4. The License Administrator tab for this license will be displayed.

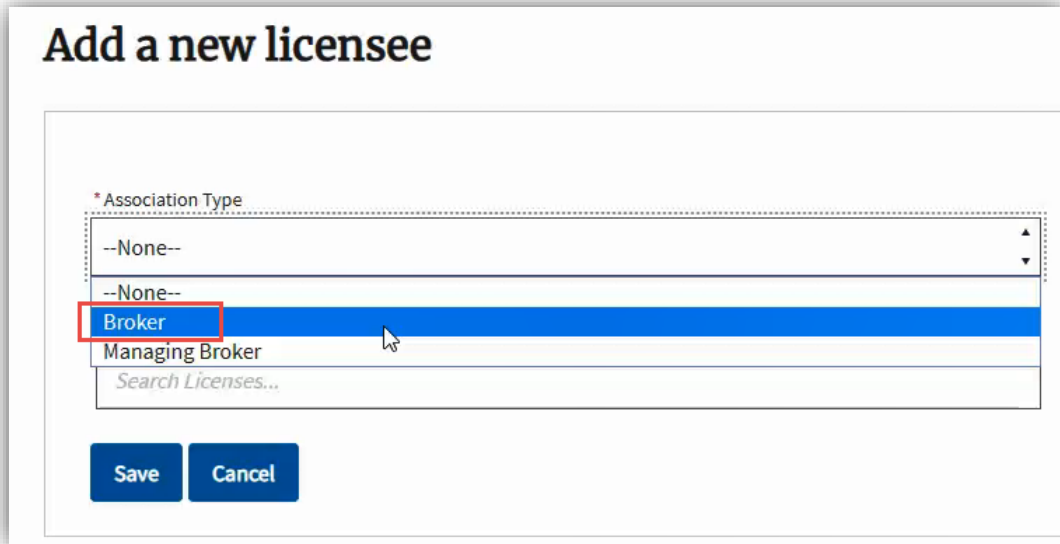
Branches	License Administrator	Unsubmitted Applications	Submitted Applications	Completed Requests
Name	Role	Email	Status	Actions
Barry Blueberry	Administrator	barryblueberry@mailinator.com	Active	Remove
				Add Administrator
Owners				
Name	Role	Email	Status	Actions
Mary Blueberry	Owner	maryblueberry@mailinator.com	Active	Remove
Jerry Blueberry	Owner	jerryblueberry@mailinator.com	Active	Remove
				Add Licensee

- If you want to add a licensee to a **Branch license**, **select** the Branches tab (to the left of the License Administrator tab), then **click** the link for the branch license you want to add the licensee to. The Branch Administrator tab for the license will be displayed.

5. **Scroll down** until you see the Add Licensee button in the lower right-hand corner of the page. **Click** the button.

Branches	License Administrator	Unsubmitted Applications	Submitted Applications	Completed Requests
Name	Role	Email	Status	Actions
Barry Blueberry	Administrator	barryblueberry@mailinator.com	Active	Remove
				Add Administrator
Owners				
Name	Role	Email	Status	Actions
Mary Blueberry	Owner	maryblueberry@mailinator.com	Active	Remove
Jerry Blueberry	Owner	jerryblueberry@mailinator.com	Active	Remove
				Add Licensee

6. **Select** the Associate Type from the dropdown in the Add a new licensee section.



The screenshot shows a form titled "Add a new licensee". Below the title is a dropdown menu labeled "* Association Type". The dropdown is open, showing a list of options: "--None--", "--None--", "Broker", and "Managing Broker". The "Broker" option is highlighted in blue and has a red rectangular box drawn around it. Below the dropdown is a search bar with the placeholder text "Search Licenses...". At the bottom of the form are two buttons: "Save" and "Cancel".

7. **Enter** license number for the licensee, and **select** license/name from dropdown.



The screenshot shows the same "Add a new licensee" form. The "* Association Type" dropdown is now closed. Below it, a search bar contains the text "20111018". Below the search bar, a list of search results is displayed. The first result is "20111018" with "Mary Marionberry" listed below it. This result is highlighted in light blue and has a red rectangular box drawn around it. Below the search results is another search bar containing the text "20111018". At the bottom of the form are two buttons: "Save" and "Cancel".

8. Click the Save button.

Add a new licensee

* Association Type
Broker

* License Number
20111018

Save Cancel

9. The licensee will show in the Licensee Relationship section with a Relationship Status of Invited.

Licensee Relationships

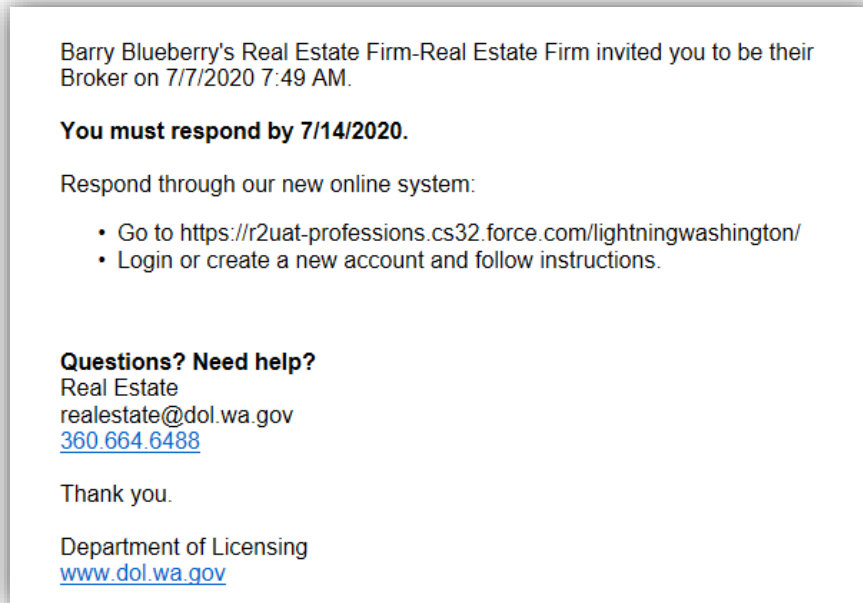
Search By: None Search Here: Search...

Export Separate Licensee(s)

License Number	Name	License Type	License Status	Expiration Date	Association Type	Relationship Status	Actions
20111018	Mary Marionberry	Real Estate Broker	Inactive	July 07, 2022	Broker	Invited	Cancel

Add Licensee

10. An email will be sent to the email address on file for the licensee.
 - The invited licensee will have **7 days** to respond to the invitation.



11. **Repeat** steps 5-9 for each licensee if you are adding more than one licensee.
12. After the licensee has accepted the invitation, the licensee's Relationship Status will be updated to Active.

Licensee Relationships

Search By: None Search Here:

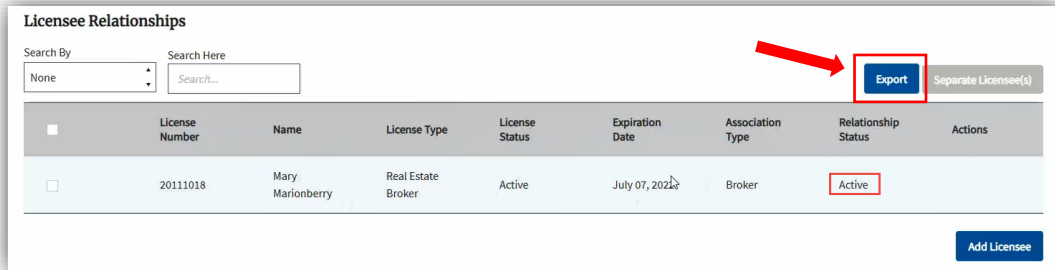
[Export](#) [Separate Licensee\(s\)](#)

<input type="checkbox"/>	License Number	Name	License Type	License Status	Expiration Date	Association Type	Relationship Status	Actions
<input type="checkbox"/>	20111018	Mary Marionberry	Real Estate Broker	Active	July 07, 2022	Broker	Active	

[Add Licensee](#)

Export Licensee Relationships Report

1. Select the **Export** button to produce an Excel report that lists all affiliated brokers and managing brokers and their license and relationship status.

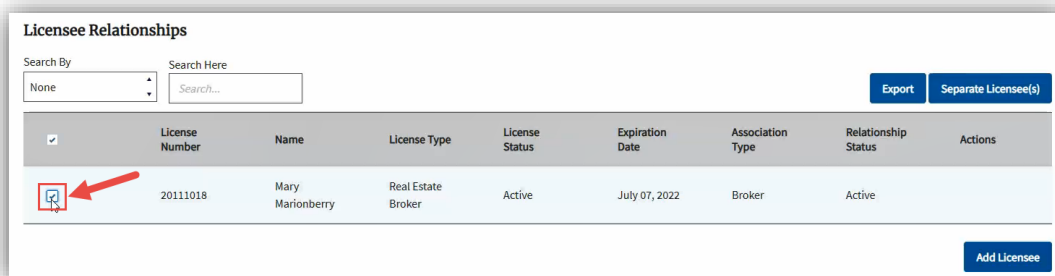


Separate Licensee(s)

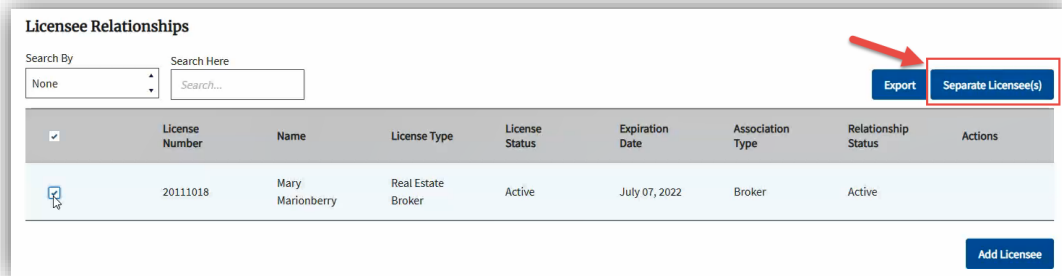
1. **Navigate** to the Licensee Relationships section of the license (or branch license) you want to remove the licensee from (see steps 1-4 above).
 - If you see a **Load More** button to the right above the Licensee List, **click** the button repeatedly until it grays out to load all licensees.
 - You must have all licensees loaded before you can search for licensees.



2. **Locate** the licensee you want to remove. You can use the search function to help you quickly locate the licensee.
3. **Click** the checkbox next to the licensee you want to remove.
 - You can select more than one licensee during this step.



4. Click the Separate Licensee(s) button in the upper right-hand corner of the Licensee Relationships section.



The screenshot shows the 'Licensee Relationships' section of a software interface. At the top left, there is a 'Search By' dropdown menu set to 'None' and a 'Search Here' text input field. In the top right corner, there are two buttons: 'Export' and 'Separate Licensee(s)'. A red arrow points to the 'Separate Licensee(s)' button, which is also highlighted with a red rectangular box. Below the search area is a table with the following columns: License Number, Name, License Type, License Status, Expiration Date, Association Type, Relationship Status, and Actions. The table contains one row with the following data: License Number: 20111018, Name: Mary Marionberry, License Type: Real Estate Broker, License Status: Active, Expiration Date: July 07, 2022, Association Type: Broker, Relationship Status: Active. There is a checkbox in the first column of the table, which is currently checked. At the bottom right of the interface, there is an 'Add Licensee' button.

	License Number	Name	License Type	License Status	Expiration Date	Association Type	Relationship Status	Actions
<input checked="" type="checkbox"/>	20111018	Mary Marionberry	Real Estate Broker	Active	July 07, 2022	Broker	Active	

5. The licensee will be removed from the Licensee Relationships list.