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# User Privileges Policy

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## 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

### 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 AMS search
- Access Forms
- Access My Clients
- Search active listings (requires search off-market listings)
- Access My Service Partners
- Email listings as attachments
- The Thing
- 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.

### 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
- Search off-market listings
- Access Financial Tools
- Search tax records
- Enable advanced AMS search
- Access Forms
- Access My Clients
- Edit transactions for own 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
- Post board messages to their agents
- Cloud CMA
- The Thing
- Access CMA
- Add/Delete Broker Forms
- Email Listings/Prospecting

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.

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**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 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
- The Thing
- 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. The Office Secretary User type will only be able to log into connectMLS between the hours of 6:00 a.m. through 10:00 p.m.

### Default Permissions for an Office Secretary:

- 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 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

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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. **NOTE:** 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 personal assistant may **NOT** have an active Real Estate Broker, Managing Broker or Leasing Agent license. If they have a license they must have a user type that matches their license (Leasing Agent, Realtor, etc.).

### 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 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
- The Thing
- Access CMA
- Email Listings/Prospecting

## MRED User Privileges Policy

### 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
- The Thing
- 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)

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Access My Service Partners  
Cloud CMA  
The Thing  
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  
Put a listing in the KILL status (within 72 hours)

**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 feeds is insufficient.

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