

Manage Licensees – Real Estate Firms/Branches

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

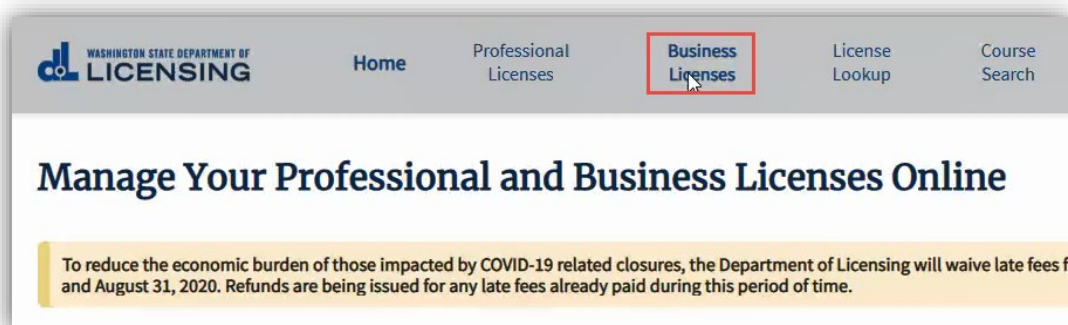
If you haven't yet done so, see the document [Create your user access to the Professional and Business Licensing System](#) for detailed instructions on these processes.

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

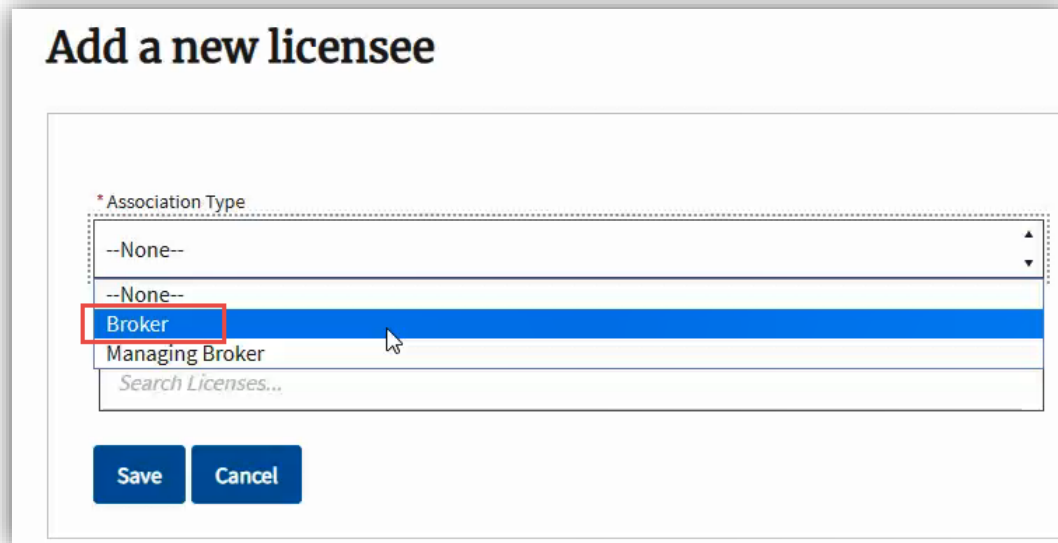
4. The License Administrator tab for this license will be displayed.

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 web form titled "Add a new licensee". Inside the form, there 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, there is a text input field with the placeholder text "Search Licenses...". At the bottom of the form, there are two blue 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 dropdown menu is now showing search results for the license number "20111018". The text "Show All Results for '20111018'" is displayed at the top of the dropdown. Below this, there are two search results: "20111018" and "Mary Marionberry". The "20111018" result is highlighted in blue and has a red rectangular box drawn around it. Below the search results, there is a text input field containing the license number "20111018". At the bottom of the form, there are two blue 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

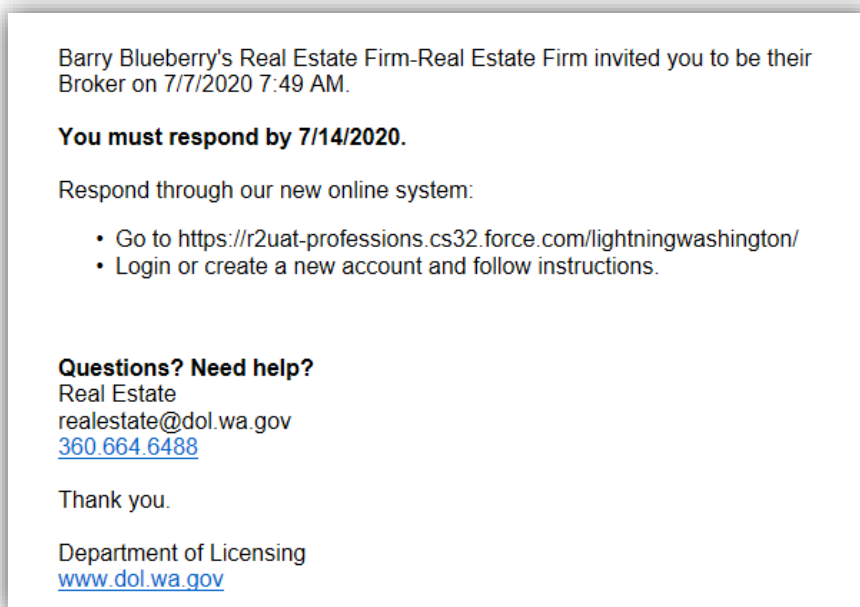
Search By: None Search Here: Search...

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.

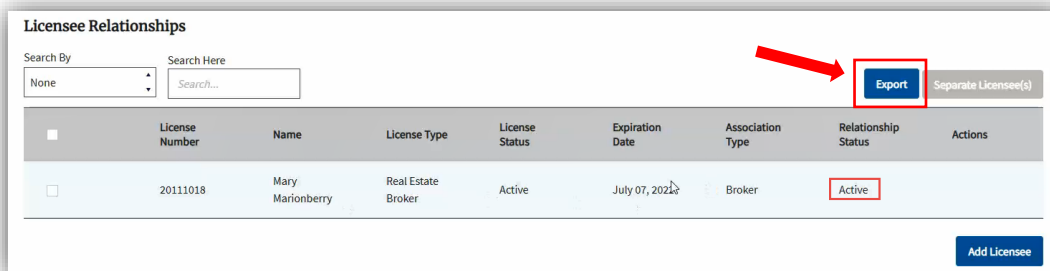


11. **Repeat** steps 5-9 for each licensee if you are adding more than one licensee.
12. After the licensee has accepted the invitation, the licensee's Relationship Status will be updated to Active.

Licensee Relationships								
Search By		Search Here						
None		Search...						
		Export		Separate Licensee(s)				
	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.



The screenshot shows the 'Licensee Relationships' section. At the top, there are search filters: 'Search By' (set to 'None') and 'Search Here' (with a 'Search...' input field). To the right of these filters are three buttons: 'Export' (highlighted with a red box and a red arrow), 'Separate Licensee(s)', and 'Add Licensee'. Below the filters 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 for Mary Marionberry, a Real Estate Broker, with an Active license status, expiring on July 07, 2022, and an Active relationship status. The 'Active' status in the Relationship Status column is also highlighted with a red box.

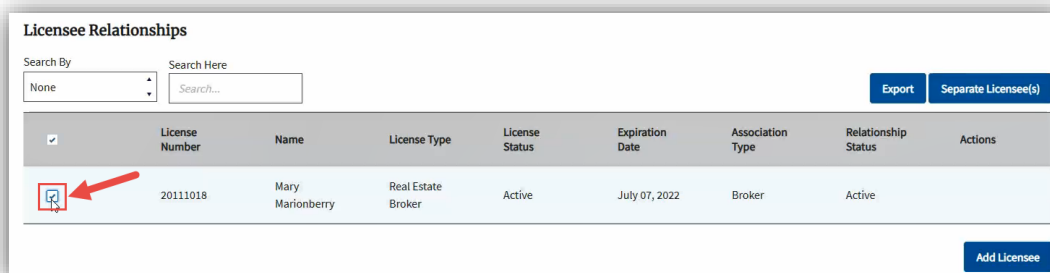
Separate Licensee(s)

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.



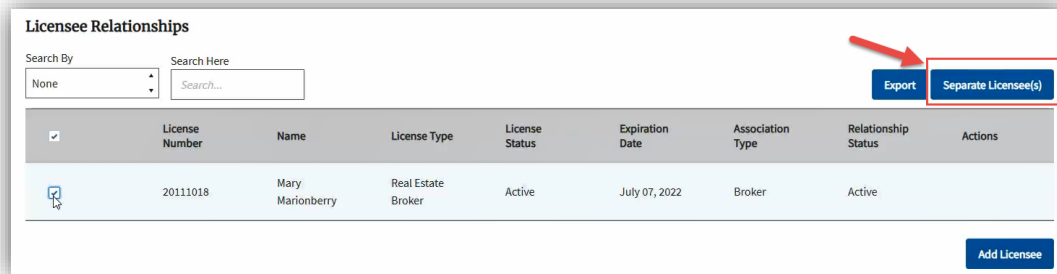
This screenshot shows the top portion of the 'Licensee Relationships' interface. It includes the search filters and the 'Export' and 'Separate Licensee(s)' buttons. The 'Load More' button, located to the right of 'Separate Licensee(s)', is highlighted with a red box.

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.




This screenshot shows the 'Licensee Relationships' table. The first row, for Mary Marionberry, has its checkbox in the 'Actions' column highlighted with a red box and a red arrow. The table columns are the same as in the previous screenshot. The 'Add Licensee' button is visible at the bottom right.

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



The screenshot shows a web interface titled "Licensee Relationships". 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 enclosed in a red rectangular box. Below the search area is a table with the following columns: a checkbox, "License Number", "Name", "License Type", "License Status", "Expiration Date", "Association Type", "Relationship Status", and "Actions". The table contains one row for a licensee named "Mary Marionberry" with license number "20111018", license type "Real Estate Broker", status "Active", expiration date "July 07, 2022", association type "Broker", and relationship status "Active". In the "Actions" column for this row, there is a small icon of a document with a checkmark. At the bottom right of the interface, there is an "Add Licensee" button.

<input checked="" type="checkbox"/>	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.