

# A Guide to Updating your Agent Profile



## How to upload evidence of Business Safeguards (Client Money Protection, Professional Indemnity Insurance, and Membership to a Redress Scheme)

1. Log in to your RSW user account.
2. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
3. Click on “View/Edit” button.
4. Scroll down and click on the paper clip icon to upload a document from your saved folder.
5. Click on “Add” to upload additional documents, then click "Update" to save changes.

## How to upload an up-to-date Managed Properties List

1. Log in to your RSW user account.
2. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
3. On the left-hand side, click on “Managed Rental Properties in Wales”
4. The guidance information on this page explains the format that you need to provide your managed property list in and how to download the required template and upload it in this area

## How to update correspondence address and branch addresses.

1. Log into your RSW user account.
2. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
3. Click the green ‘Add Office’ button.
4. Select ‘Correspondence address’ to update correspondence address.
5. Select ‘Registered address’ to update office/branch addresses.
6. Enter the name of the location for reference purposes (i.e. Branch address or Registered address)
7. Click ‘Add’ to update changes.

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## How to connect an employee – corporate body/charity/trust licence

1. Log into your RSW user account.
2. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
3. On the left-hand side, click on “Connected Users”, then click on ‘Invite users to join...’
4. You will need to input the required information, and then click add.

## How to delete an employee – corporate body/charity/trust licence

1. Log into your RSW user account.
2. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
3. On the left-hand side, click on “Connected Users”, then click on the name of the employee that has left.
4. Amend user status from Active to Resigned role.
5. Then select **X** to signify that they are no longer responsible for lettings and management, before accepting the declaration and clicking on ‘Update’.

## How to add an employee – individual licence

1. Log into your RSW user account.
2. Scroll down and click on ‘View my profile’.
3. Scroll down and click on ‘Invite employees’.
4. You will need to input the required information, and then click invite user.

## How to delete an employee – individual licence

1. Log into your RSW user account.
2. Scroll down and click on ‘View my profile’.
3. Scroll down and click on the dustbin icon next to the user you wish to remove.

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## How to accept/reject an outstanding property invitation

1. Log into your RSW user account.
2. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
3. On the left hand side, click on 'Outstanding Property Invites'.
4. Click either the 'Refuse' or 'Confirm' button, which is located next to each property that has been linked. This can only be done by a Principal User connected to the agent profile.
5. You can select the properties individually, 'Select All', 'Select None' and you can either 'Accept All Selected' or 'Refuse All Selected'.

## How to delete link to rental property

6. Log into your RSW user account.
7. Scroll to the bottom of the page and click 'Manage Agent'. This will take you to the agent licence profile.
8. On the left hand side, click on 'Managed Rental Properties in Wales'.
9. Click the dustbin icon, which is located next to each property that has been linked. This can only be done by a Principal User connected to the agent profile.

**If you require any further guidance, additional support with keeping your agent profile up-to-date, or to remove an employee that no longer is under contract of service, then please do not hesitate to contact us on 03000 133 344**