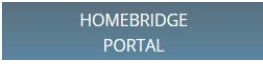# Broker Administrator Guide to Managing Users

This guide is intended to provide step by step instructions for Broker Administrators to add and edit individual User access and functionality in the HomeBridge Portal. There are two options for managing Users: 1) Follow these step by step instructions or 2) Contact Client Administration at brokerapproval@homebridge.com to request user additions and/or changes.

I.   Login to HomeBridge Portal

- Go to www.homebridgewholesale.com

- Click on [HOMEBRIDGE PORTAL] in the middle of the home page
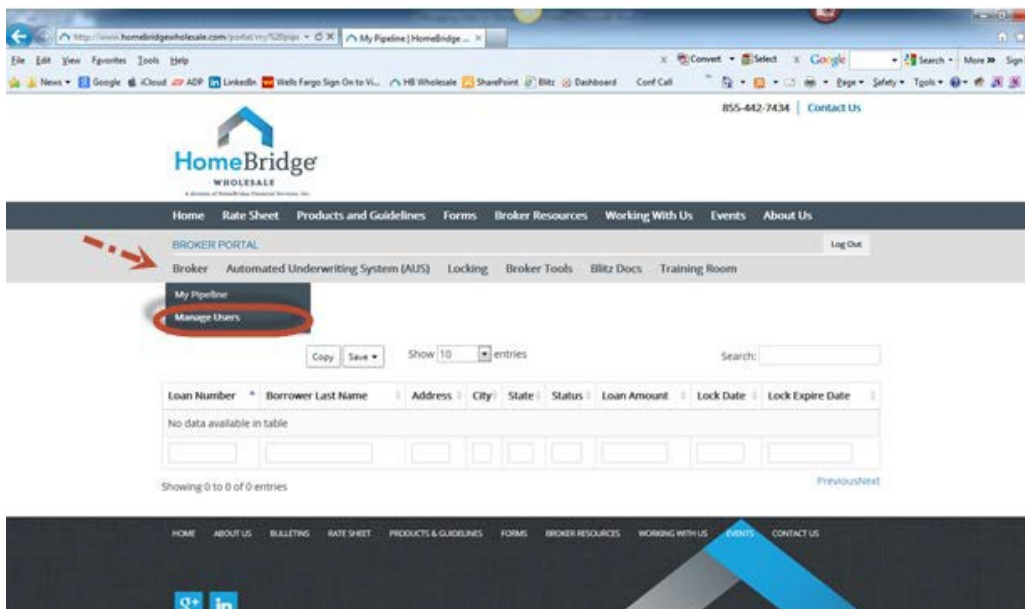
- Login to portal using credentials provided at time of broker approval

- Once logged in, hover your cursor over **Broker** and click on **Manage Users** from dropdown

II. Add New User

- From the **Manage Users** screen click on **Add New User**

- Add new user's name, email address, and enter a password twice (must be at least 6 digits).

- Click on the ✚ next to the Broker Company name

Brokers Association:

ID ▲	Broker ⇕	Add Broker ⇕
8666	HB Test Broker	✚

- Scroll down to **Other** section
- Check or uncheck desired user functionality:
  - **Can Manage Users:** allows user the ability to add/edit users
  - **Can Set Broker Compensation:** allows user to change broker compensation elections between the 1st and 25th of every month
- Click **Save** and **OK**

Showing 1 to 1 of 1 entries   PreviousNext

Other

☑ Can manage users   ☐ Can See all Brokers
☐ Can Set Broker Compensation

Notes

Save

III. Edit User

Edit User Name and Password Reset

- From the **Manage Users** screen, choose the user you want to edit and click on

- From this screen you can change their name, email address, and reset their password
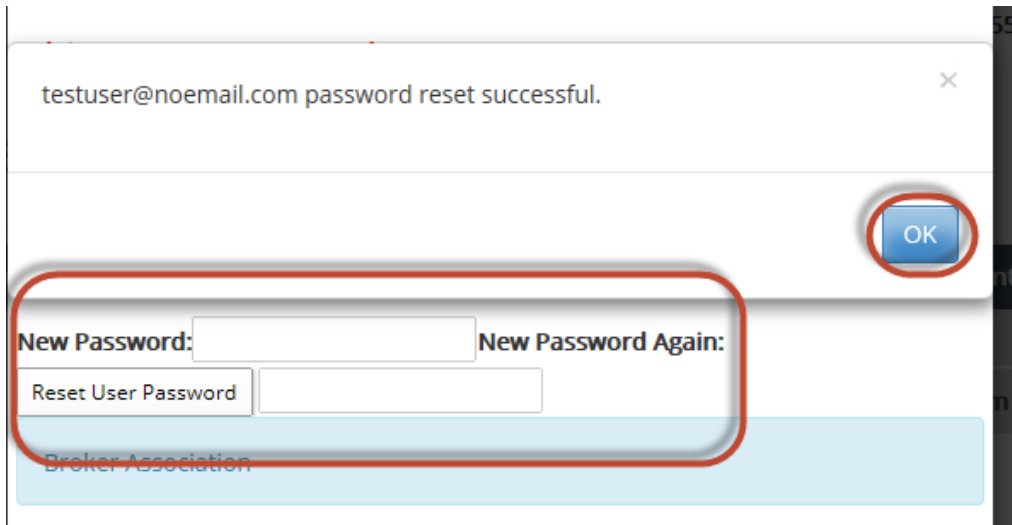
- To reset password, input new password twice (must be at least 6 digits) and click on **Reset User password**.
- Then click **OK**

Edit User Functionality

- In the **Edit User** screen, scroll down to **Other**
- Check or uncheck desired user functionality:
    - **Can Manage Users:** allows user the ability to add/edit users
    - **Can Set Broker Compensation:** allows user to change broker compensation elections between the 1st and 25th of every month
- Click **Save** and **OK**

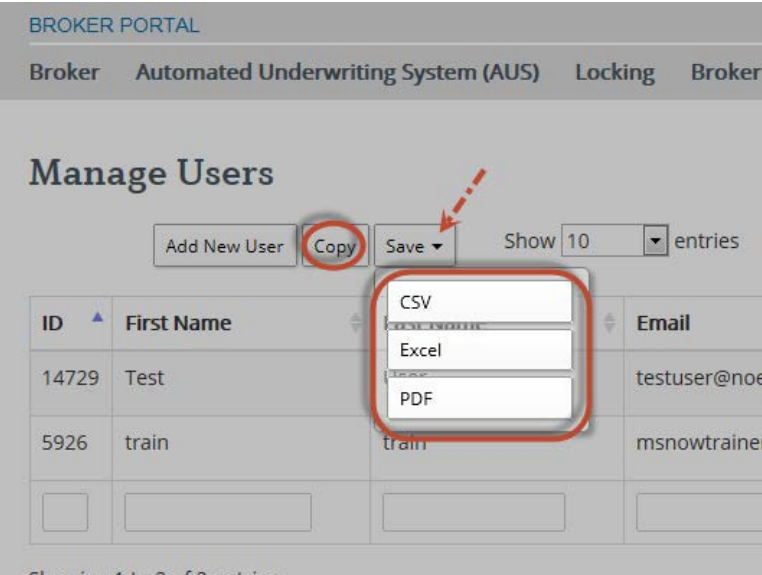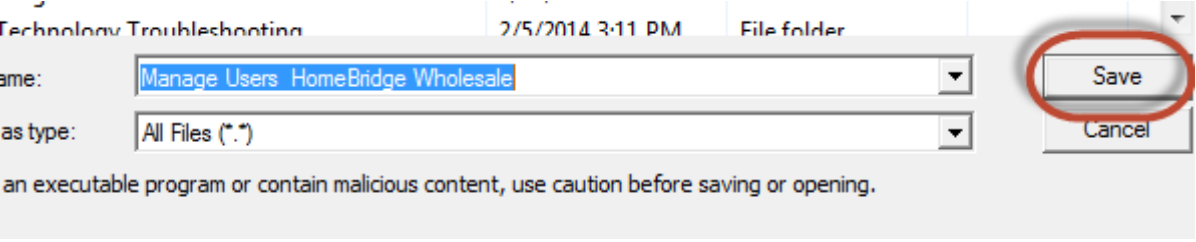## IV. Copy List of Users and Export

- From the Manager Users screen, click on **Copy**. This will copy your entire user list to your clipboard.
- Then click on the **Save** dropdown and choose the format you want to export your data into: **CSV, Excel, or PDF**

- **Save** document in desired location on your computer

- Below is an Excel example export

	A	B	C	D	E	F	G
1	ID	First Name	Last Name	Email	Impersonate	Edit User	
2	14729	Test	User	testuser@noemail.com			
3	5926	train	train	msnowtrainer@train.com			
4							

If you have any questions, please contact your Account Executive.