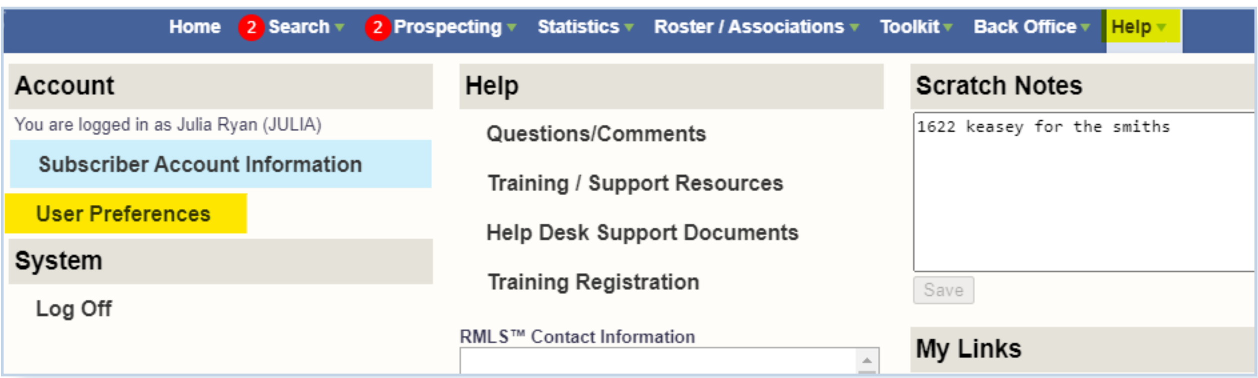
Editing User Preferences in RMLS*web*

Below you will find instructions for using this tool. If you have any questions please contact our Help Desk at 503-872-8002 or toll-free at 1-877-256-2169 outside of Portland.

User Preferences allows you to set branding specifics, such as a signature or photo, as well as edit contact information.

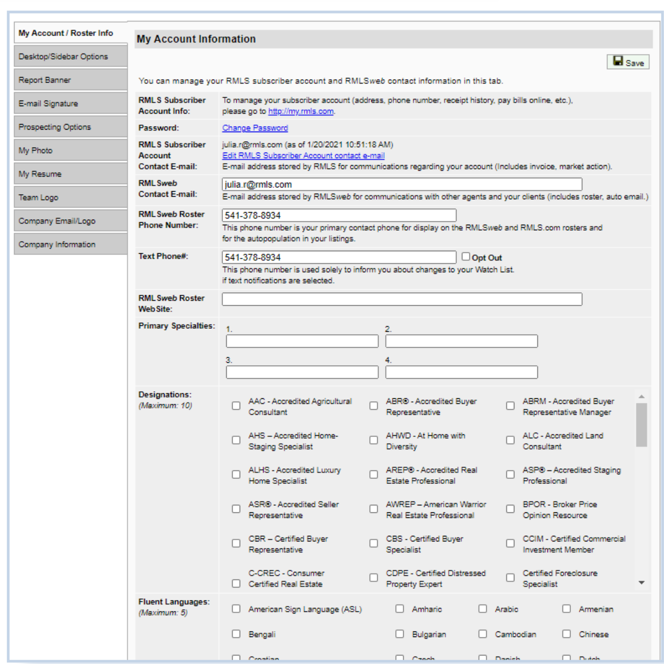
To get there, select either *Toolkit* or *Help* from the Main menu and select User Preferences.

Inside User Preferences you will see tabs that are located to the left. You can edit the following tabs to ensure that your information is up-to-date and accurate. Be sure to use the SAVE button on each tab as you make changes.



My Account Information / Roster Info:

In this tab, you can manage your account information. Change your password, update your billing and public email addresses, update your roster phone number and website, add primary specialties, designations and fluent languages.

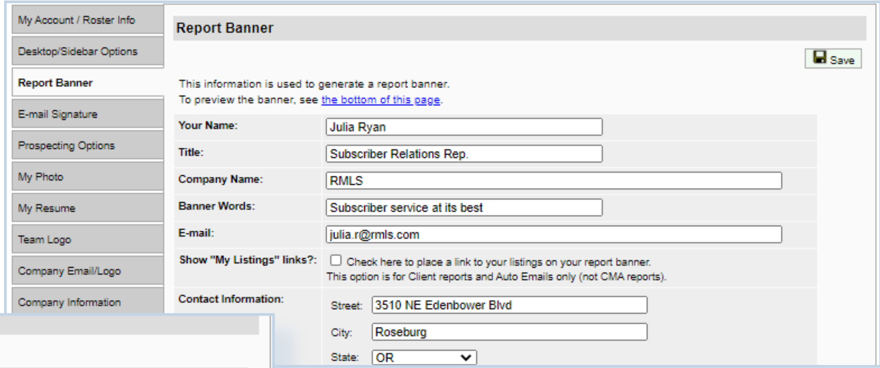


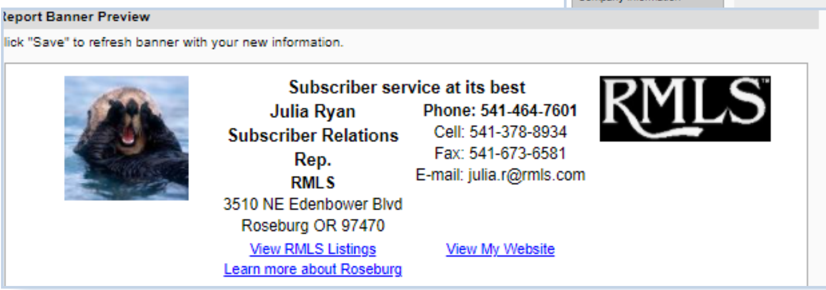
Desktop/Sidebar Options:

Here, you can save links for websites that you frequently use for quick access via the Help Menus "My Links" section.

Report Banner:

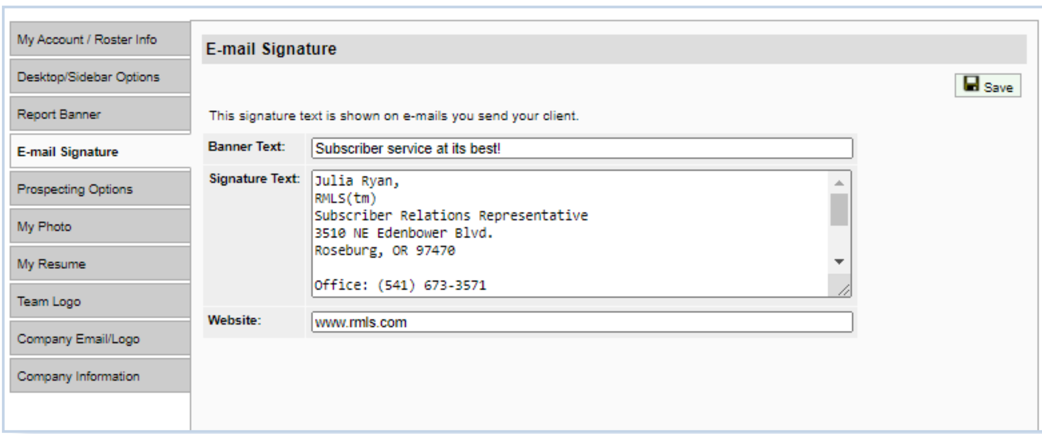
The report banner tab allows you to manage information displayed on the reports you send to your clients. You can generate a report banner that includes your name, title, company and other key information.





E-Mail Signature:

In this tab, manage the signature text that is shown in e-mails you send from RMLS*web*.

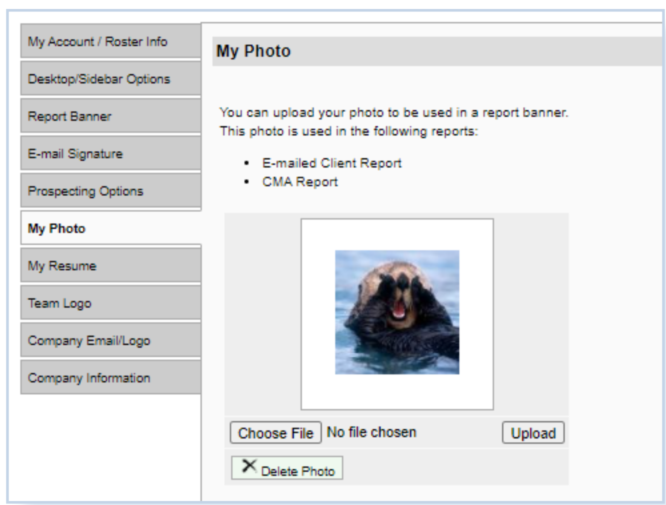


Prospecting Options:

Check the box in this tab if you want to get notification e-mails sent to you about new prospect matches. *Note: this will be in addition to any e-mails you get as a result of being cc'd on auto-emails for clients.*

My Photo:

Upload a personal photo that will be attached to all reports sent to your clients from RMLS*web*.

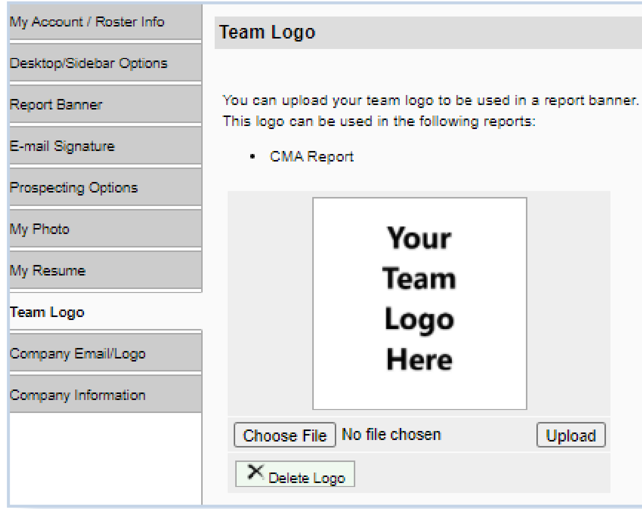


My Resume:

In this tab, you can create a standard page, such as a list of your accomplishments, designations or additional skills to be included in your CMA's. For best results when printing, make sure your text is completely visible. For example, if you have to scroll to see any information, it may not print correctly.

Team Logo:

Here, you can upload a unique team logo to be displayed in your CMA report.



Company Email/Logo:

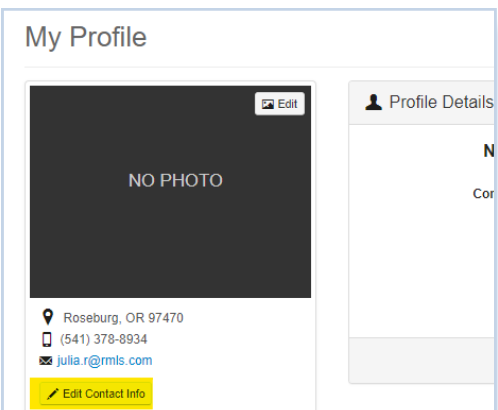
The company email and logo is managed by your firm's principal broker. The company logo can be included in client reports and in the CMA. It can be uploaded in the Company Logo tab.

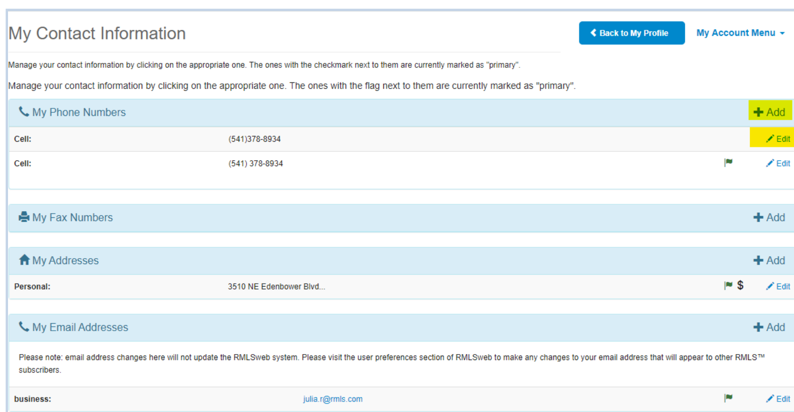
Company Information:

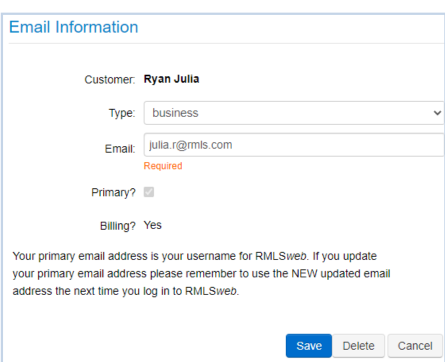
In this tab, you can create a page for the CMA that allows you to insert information about your company. Remember that for best results, make sure your text is completely visible, (if you have to scroll to see any of the information, it may not print correctly).

My.RMLS.com:

It is important to update your information for my.rmls.com as this is where your billing and personal account information is held. To update your information, go to User Preferences on RMLS*web*, (see instructions at the beginning of this document). At the top of "My Account Information", next to "RMLS™ Subscriber Account Info," is a link for my.rmls.com.







Click on the link and a new window opens. Click the "Edit Contact Info" button under the photo box. Here you can update all of your personal information by clicking in the "Edit" link in each section.

Now you will see a page as shown below. Make any additions or corrections here by clicking on the Add or Edit links. Be you use the "Save" button at the bottom of the selection pop up to save your changes.

Document #: **1756**
Revision Date: **2/4/2021**
Pages in File: **3**
Help Desk: **503-872-8002 or toll-free at 1-877-256-2169**