ADX

Quick Guide - Access Sharing

June 2022

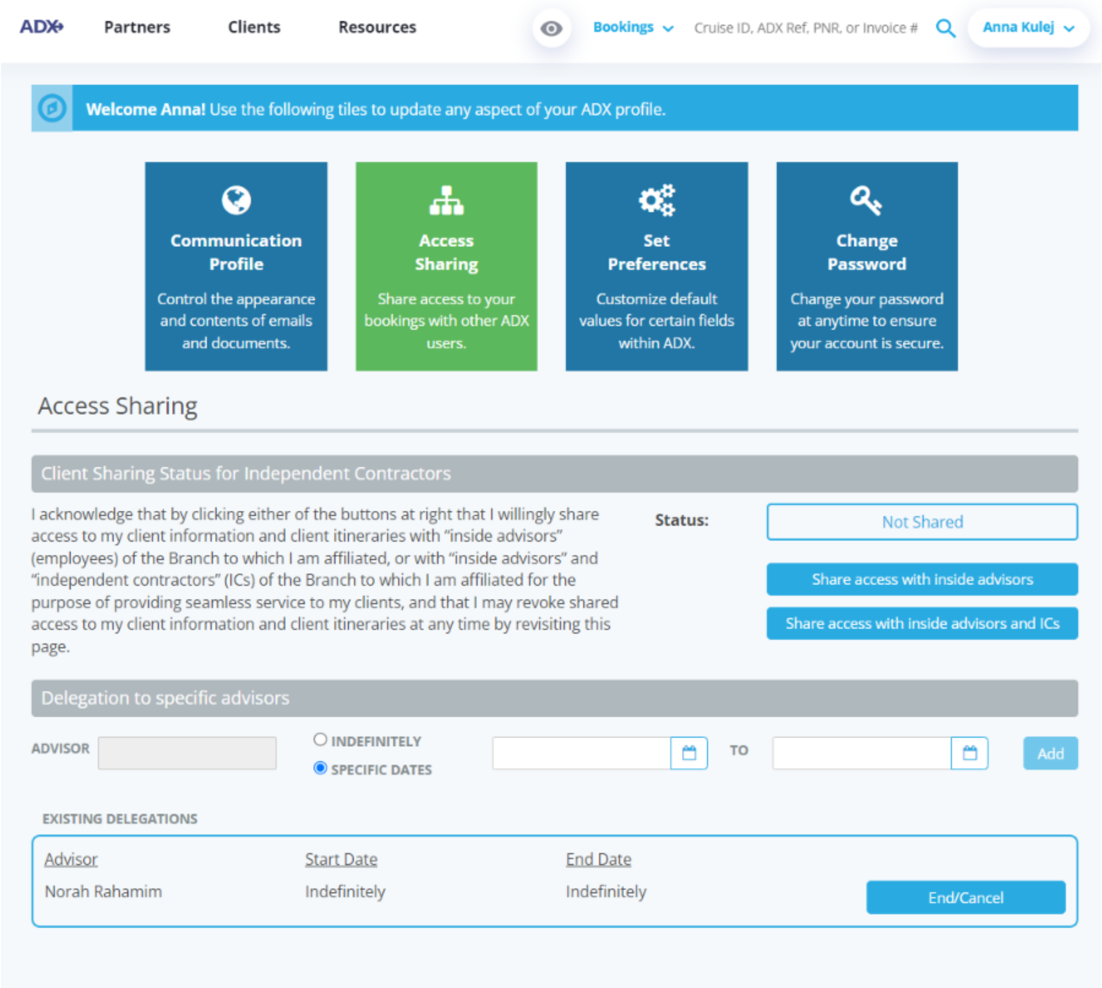
Contents

1.1. ACCESS SHARING

ADX accounts are set up to be shareable with other advisors within the same office. Advisor can choose the level of visibility of client and data information they are comfortable with. Advisors cannot share content with anyone outside of their assigned office.

To protect advisor privacy, ADX defaults to **NOT** sharing clients and booking information. Advisors will need to go into their profile page and set the permissions to the sharing level manually.

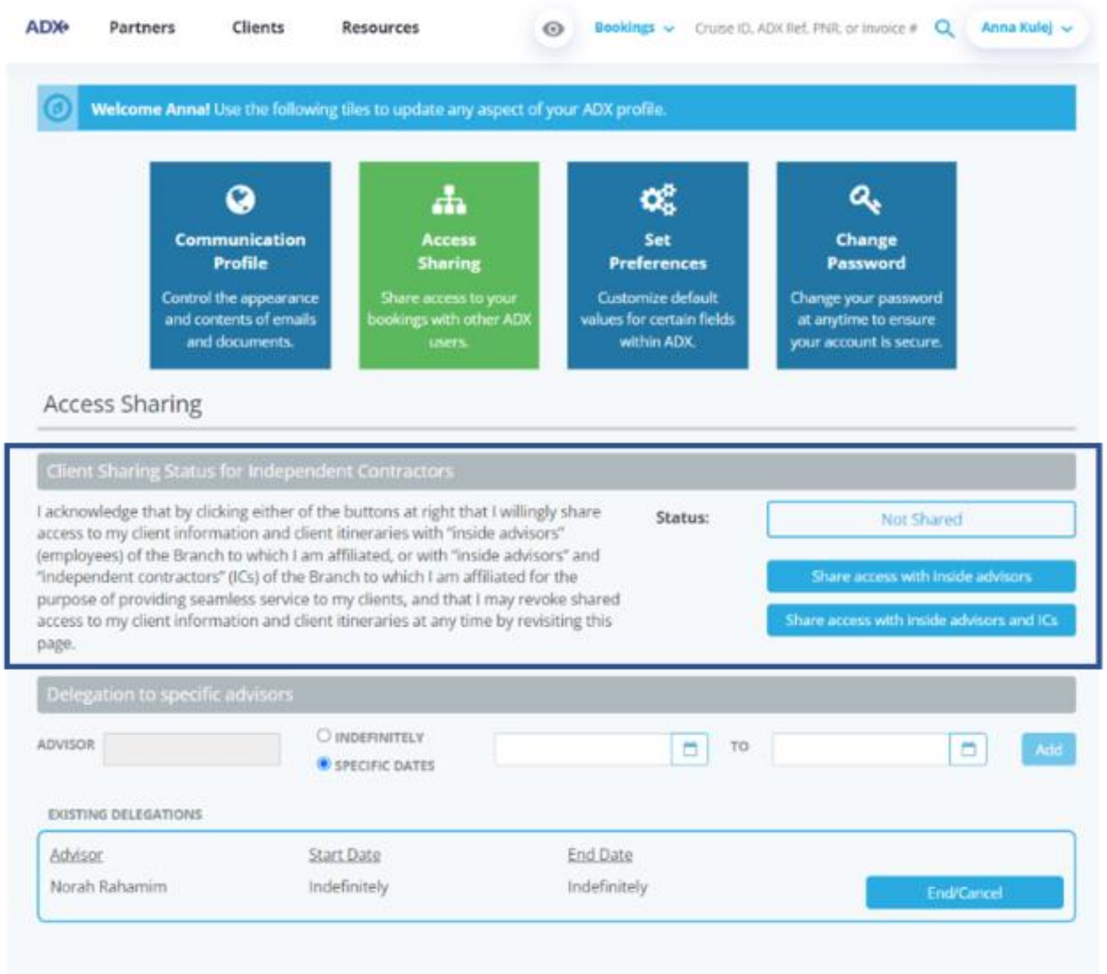
There are three levels of permissions in ADX: **not shared, shared with other advisors within their branch, delegations.**



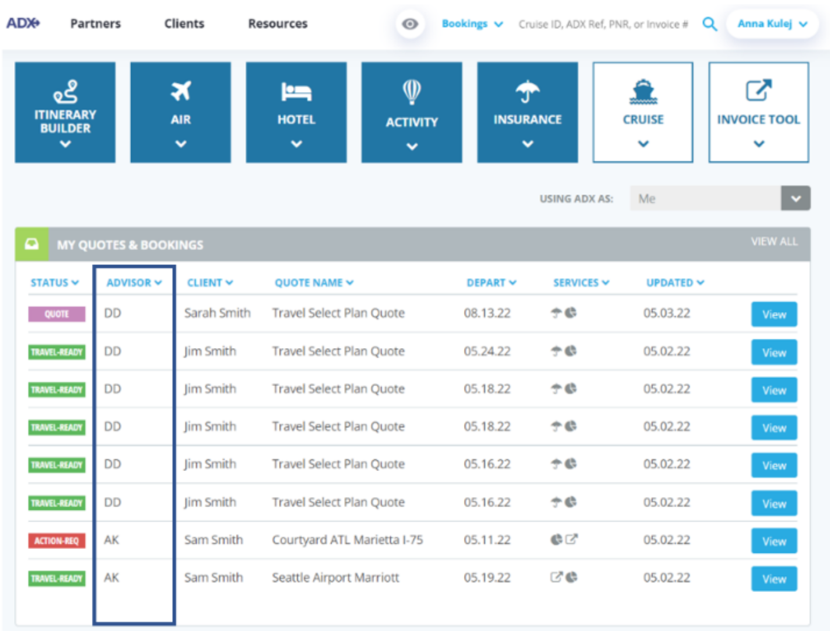
1.2.1 Set Access Permissions

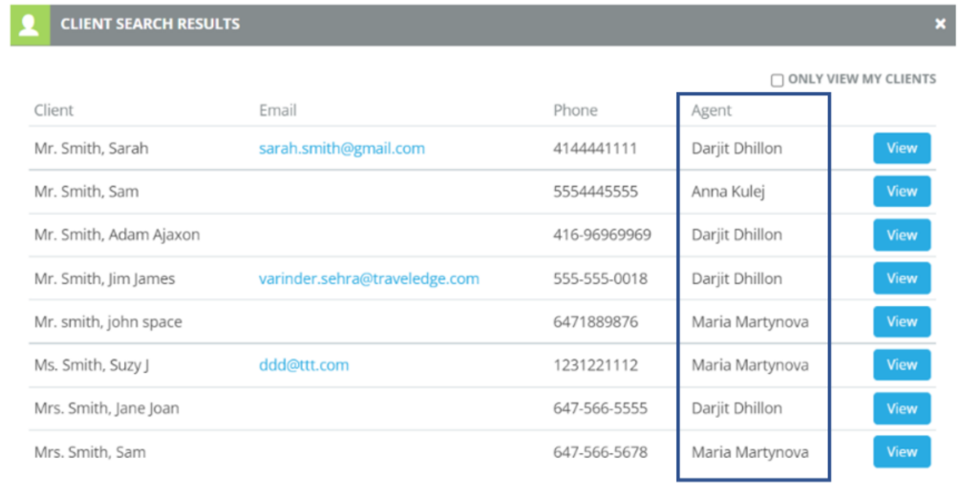
Set client sharing permissions by selecting the desired status. Shared accounts will be able to see and access client information as well as ADX quotes and bookings. Access can be changed at any time.

- ***Not Shared*** – Nobody except manager
- ***Share access with inside advisors*** – Only internal employees and managers
- ***Share with Inside Advisors and IC's*** – All branch employees, ICs, and managers



When sharing permissions are set to SHARED, **your quotes/bookings and client profiles will be visible to your colleagues associated with your branch**.





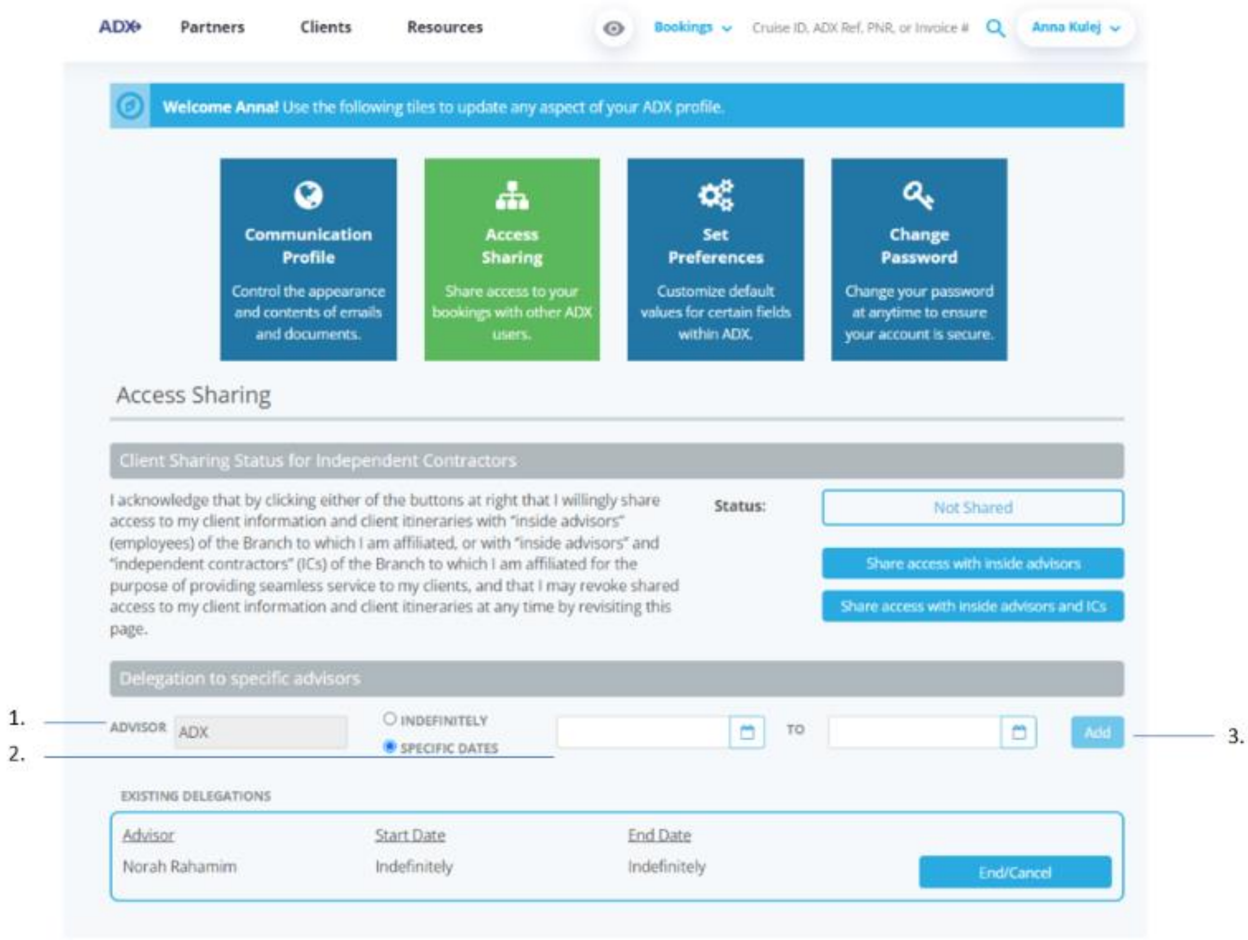
Quotes and Bookings – Agent column will indicate the primary owner of that quote. You will be able to see and access all quotes/bookings that are shared

Clients – Agent column will indicate the primary owner of that client. You will be able to access client profiles and attach these clients to your bookings.

1.2.2 Setting Delegations

Delegates are advisors who have full shared access to another advisors' ADX account (i.e., clients and bookings). Delegates can/will:

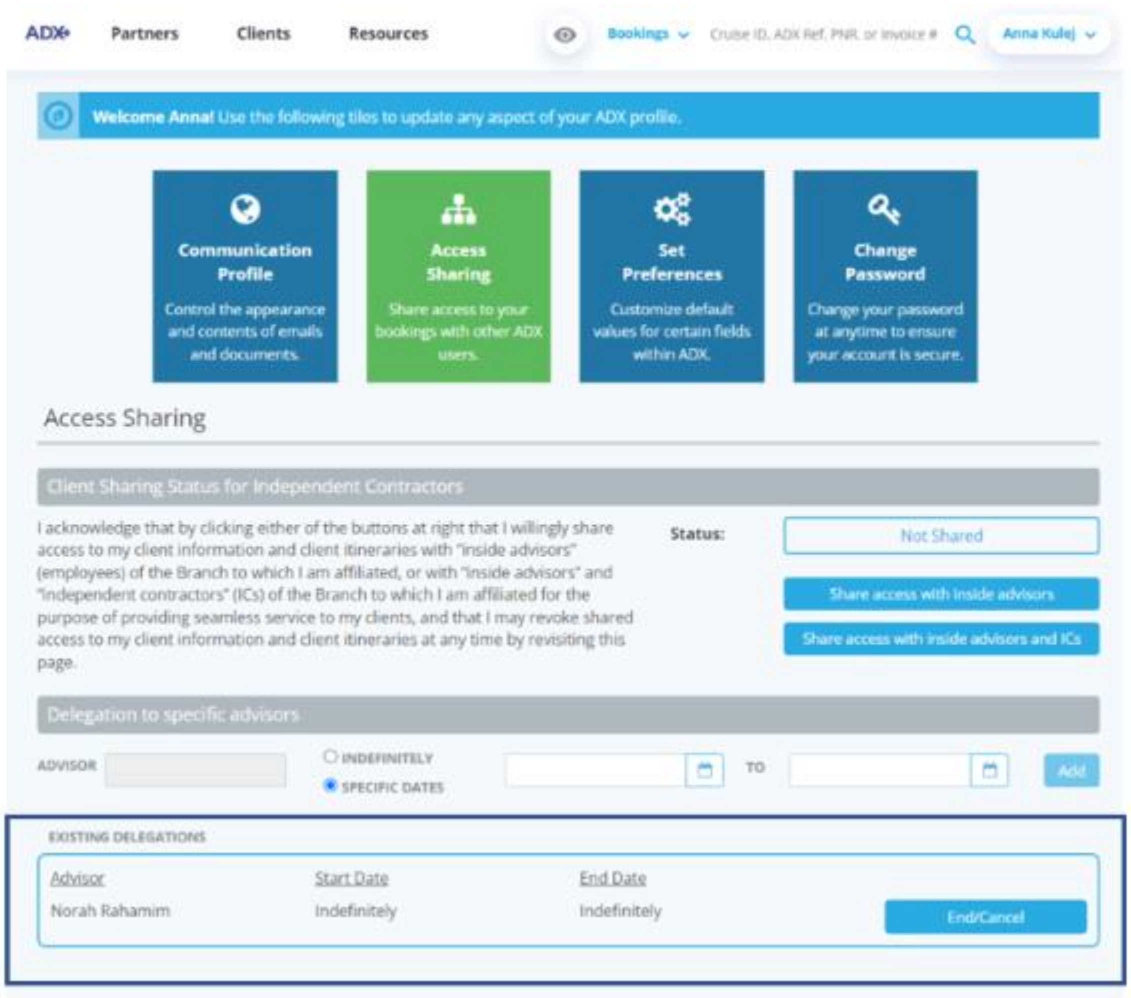
- access all bookings and clients without needing the primary advisors ADX password
- modify and action all items for the other advisor
- receive all notifications relating to the primary advisors' itineraries.
- receive all the primary advisors' notifications and will be able to action on their behalf.



	Steps		Notes
1.	Search by first or last name		• *Find advisor name* • *Advisor must be associated with the same office*
2.	Specify identify dates of sharing		• *Set indefinite access with no end date* • *Set specific date frame for start and end*
3.	Press ADD		• *Once delegate is saved they will appear in the existing delegations box*

1.2.3 Removing delegations

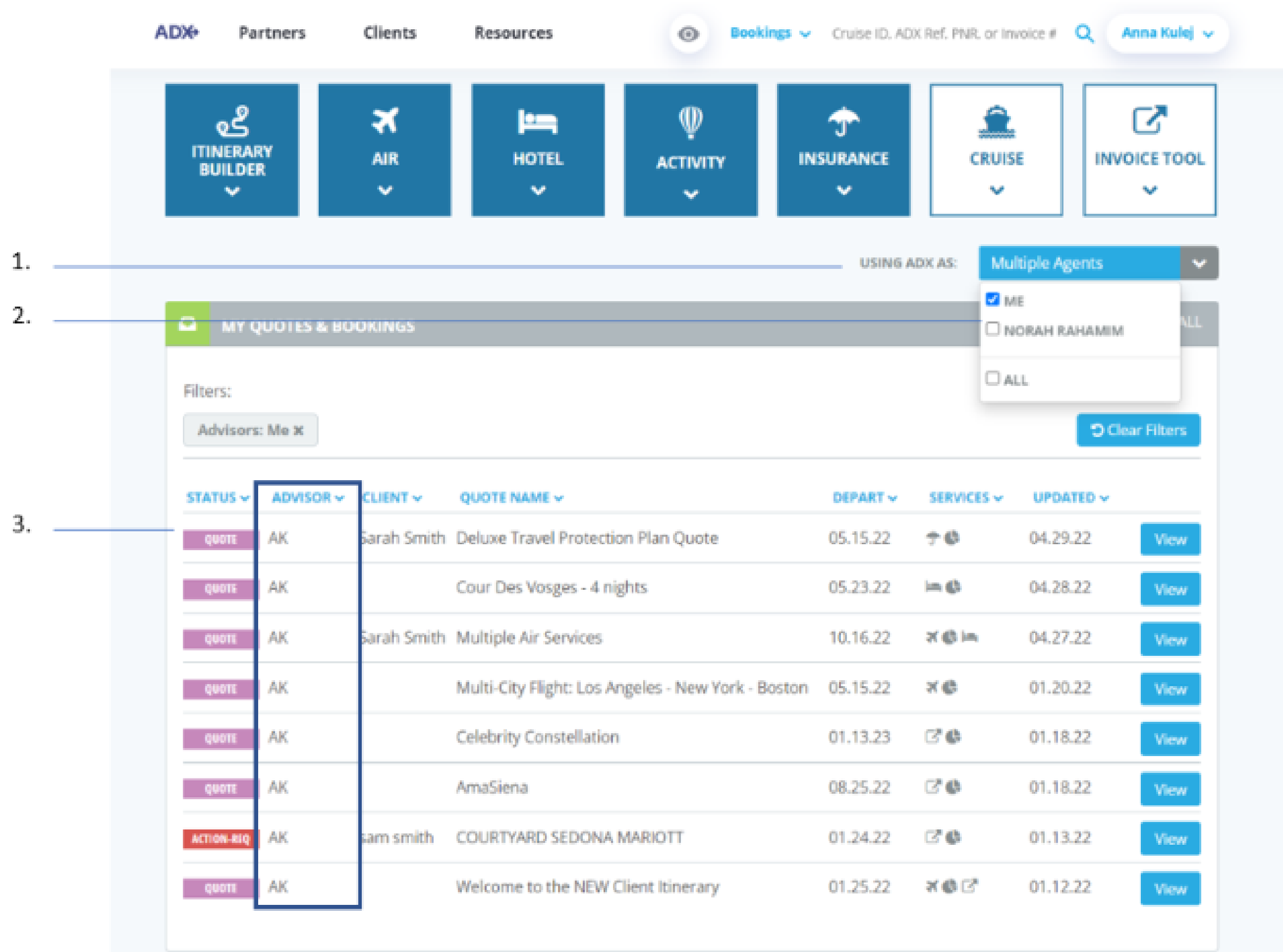
Delegation access can be removed by the advisor at any point regardless of the time parameters set. To remove the delegation access press End/Cancel on the existing delegation's section.



1.2.4 Accessing Delegate Bookings

Once delegations are set in the primary advisor profile, delegates will have access to all quotes and bookings of the primary advisor via the dashboard. The delegate will receive all notifications that pertain to any bookings made by the primary advisor and will be able to action on their behalf.

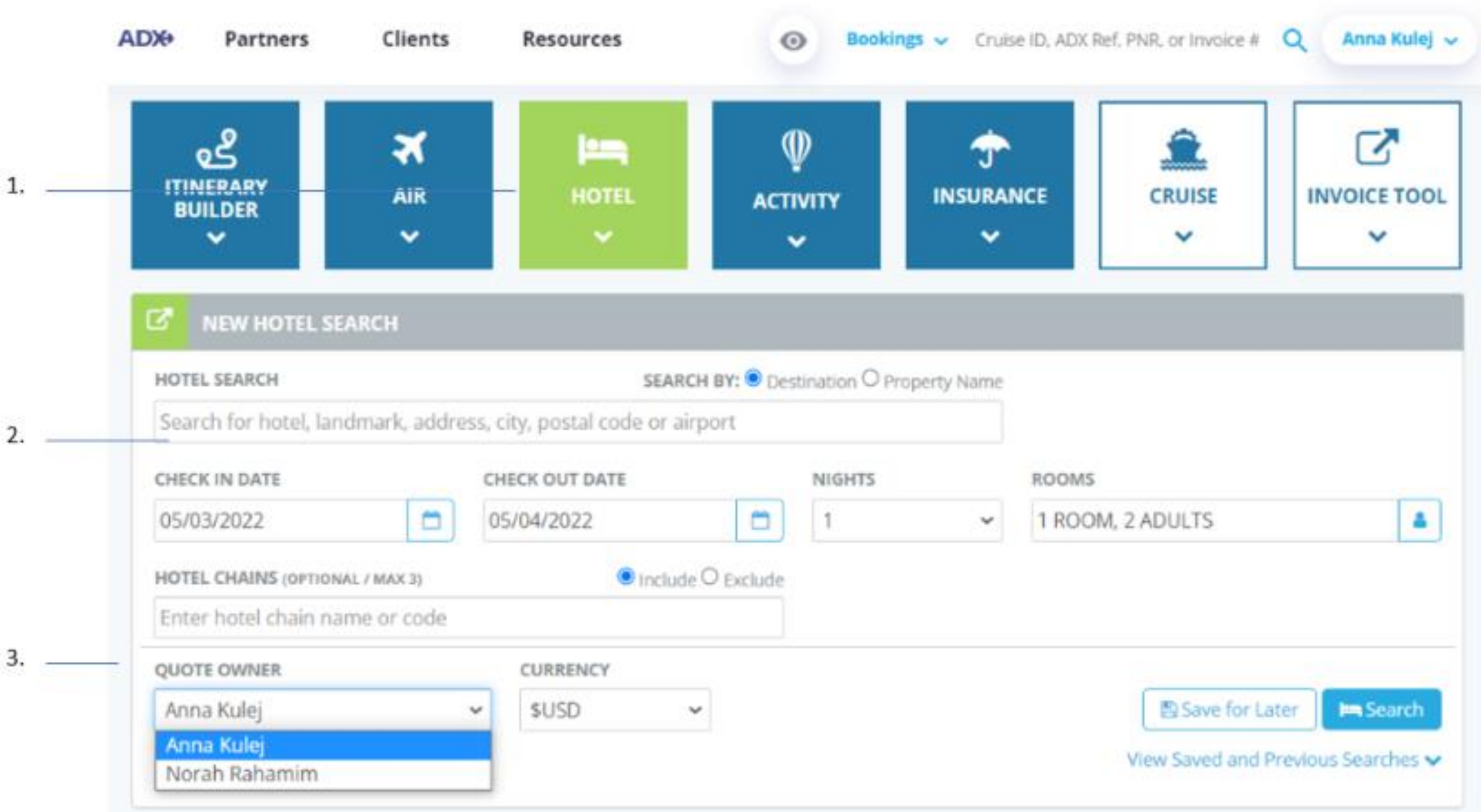
Changing the view on the main dashboard will allow advisors to go between different accounts **without having to share passwords**.



	Steps		Notes
1.	Press V button on USING ADX AS section		• *Located on main dashboard* • *Will show list of agents who have set you as a delegate*
2.	Select checkbox next to name in drop down		• *Delegating advisor must add advisor in their profile before this shows up in your list* • *Select ALL to see everyone who has delegated to you*
3.	View delegating advisor's bookings		• *Changing USING ADX AS will change the view on the dashboard* • *The ADVISOR column will show initials of primary owner of the reference*

1.2.5 Creating Quotes on Behalf Of

Once delegations are set in the primary advisor profile, quotes can be **created on behalf of other advisors**. **Quote owner needs to be changed at the time of creating the quote.** Changes after the quote is created would require ADX and finance team assistance. Quote owner can be changed for all modules offered in ADX.



	Steps		Notes
1.	Open module		• *Press on service type to begin* • *Each module will have a Quote Owner box*
2.	Fill in your search criteria		•
3.	Select name in drop down		• *Delegating advisor must add in profile before this shows up* • *Changing this will create the quote under the advisor specified as the owner*

1.2.6 Managing Delegate Notice Board

Managing delegates will have access to the primary advisors notice board and notifications.

Switching the Using ADX as field will change the view on the dashboard notice board and reflect the agent selected.

Delegates will also **receive an email** anytime a new notification is received. Managing delegate will have the ability to manage (confirm/reject) all notifications that need to be actioned.