

Sharing Rules

This user guide will explain the three types of Sharing Rules and how to set each one up. Sharing Rules are extremely useful and necessary for firms who share Clients across advisors, assistants and/or planners. Establishing sharing rules is an important part of the set up process in eMoney and will help to set you and your firm up for success in the system.

Three types of Sharing Rules:

- **Share All Clients** – give another eMoney user access to all of your Clients within eMoney. You can grant these users with delegate* access.
- **Private Clients** – hide any of your Clients from other users you're currently sharing to or will share to in the future. Private Clients take precedence over all other Sharing Rules.
- **Individual Sharing Rules** – create a rule to share specific Clients with specific users. You *cannot* grant these users with delegate access.

***Delegates** have additional capabilities when managing Clients on your behalf, such as creating/deleting a Client, setting up and managing Client websites, managing your advisor connections and managing your advisor investment assumptions.

Only the **Advisor license** has the ability to set up Sharing Rules.

1. To access the Sharing Rules click **Settings**, then **Sharing Rules**.

The screenshot shows the eMoney user interface. At the top, there is a navigation bar with the eMoney logo and menu items: Home, Clients, Connections, Analytics, Applications, More, a notification bell, and a mail icon. On the right side of the navigation bar, there are links for Settings (highlighted with a red box), Help, and Sign Out. Below the navigation bar, there is a breadcrumb trail: "Go back to Settings" followed by "Settings". The main content area is divided into two columns. The left column is a sidebar menu with a "Preferences" header and several sub-items: My Info, General, Sharing Rules (highlighted with a red box), Alliance Partners, Alerts, Client History, Branding, Monte Carlo, Lead Capture, and Marketing. Below the Preferences section is a "Security" section. The right column is titled "Client Sharing Rules" and contains the following text: "The sharing of client data must be performed through this page. Sharing your username and password with another person is strictly prohibited." Below this, there are three sections: "Share All Clients" with a description "Add a user to the list below to give them access to all of your clients" and a note "No users have been granted access to all clients." with an "Add User" button; "Private Clients" with a description "Add a client to the list below to hide them from all users. Private clients take precedence over all other sharing rules." and a note "No clients have been made private." with a "Hide Client" button; and "Individual Sharing Rules" with a description "Create a rule to allow individual users to view specific clients" and a note "No individual sharing rules have been created." with a "Create Rule" button.

Sharing Rules

Share All Clients

1. To share all your eMoney Clients with a user click **Add User** under **Share All Clients**.

The screenshot shows the eMoney Settings page. The navigation bar includes Home, Clients, Connections, Analytics, Applications, More, Settings, Help, and Sign Out. The main content area is titled 'Settings' and has a 'Go back to Settings' link. On the left is a 'Preferences' sidebar with options: My Info, General, Sharing Rules (selected), and Alliance Partners. The main content area is titled 'Client Sharing Rules' and contains the following text: 'The sharing of client data must be performed through this page. Sharing your username and password with another person is strictly prohibited.' Below this is the 'Share All Clients' section, which says 'Add a user to the list below to give them access to all of your clients' and 'No users have been granted access to all clients.' A red box highlights the 'Add User' button.

2. Then, select the **user(s)** from the list. To give the user(s) delegate access check the box **Delegate Client Management to selected users**, then click **Share**.

The screenshot shows the 'Share All Clients' dialog box. It contains the following text: 'Sharing all clients gives a user access to all of your current and future clients' information. If you choose to share with "All Users in My Office", all current and future users in your office will be granted access to all clients.' Below this is a list of users: '[All Users in My Office]', 'Brown, Katherine (Planner)', 'Knope, Leslie (Advisor)', 'Schrote, Dwight (Assistant)', and 'Swanson, Ron (Planner)'. The list is highlighted with a red box. Below the list is the text 'Press Ctrl or Shift while clicking to select multiple users'. Below that is the text 'Delegates have additional capabilities when managing clients on your behalf, such as creating/deleting a client, setting up client websites, and managing your advisor investment assumptions. To delegate these abilities to the selected users, check the box below prior to sharing.' Below this is a checked checkbox labeled 'Delegate Client Management to selected users'. Below that is the text 'To share with a user outside of your office you must know their username.' Below this is a 'Username:' label and an empty text input field. At the bottom are two buttons: 'Share' (highlighted with a red box) and 'Cancel'.

Please note: You can select multiple users from the list by pressing **Ctrl** or **Shift** on your keyboard while clicking each name. If you need to also make those users delegates, check the box to **Delegate Client Management**. The system will not allow you to **Delegate Client Management** if you select **[All Users in My Office]**.

Sharing Rules

- If you do not see the correct user in the populated list, you will need to enter their **eMoney username** in the open field. You can make this user a delegate if needed by checking the **box**, then click **Share**.

Share All Clients

Sharing all clients gives a user access to all of your current and future clients' information. If you choose to share with "All Users in My Office", all current and future users in your office will be granted access to all clients.

[All Users in My Office]
 Brown, Katherine (Planner)
 Knope, Leslie (Advisor)
 Schrote, Dwight (Assistant)
 Swanson, Ron (Planner)

Press Ctrl or Shift while clicking to select multiple users

Delegates have additional capabilities when managing clients on your behalf, such as creating/deleting a client, setting up client websites, and managing your advisor investment assumptions.

To delegate these abilities to the selected users, check the box below prior to sharing.

Delegate Client Management to selected users

To share with a user outside of your office you must know their username.

Username:

Share

Cancel

Private Clients

- To hide a Client from other users, click **Hide Client** under **Private Clients**.

eMoney Home Clients Connections Analytics Applications More
Settings Help Sign Out

Go back to Settings

Settings

- Preferences
- My Info
- General
- Sharing Rules
- Alliance Partners
- Alerts
- Client History
- Branding
- Monte Carlo

Client Sharing Rules

The sharing of client data must be performed through this page. Sharing your username and password with another person is strictly prohibited.

Share All Clients

Add a user to the list below to give them access to all of your clients

No users have been granted access to all clients.

Add User

Private Clients

Add a client to the list below to hide them from all users. Private clients take precedence over all other sharing rules.

No clients have been made private.

Hide Client

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Sharing Rules

2. Select the Client(s) you'd like to hide from others, then click **Hide Clients**.

Private Clients

Hiding a client ensures that only you have access to the client's information even if other rules indicate that the client is shared. One exception to this rule is a compliance user who has access to all clients.

- ALVIN, DAMON and DRISCOLL
- Bing, Chandler and Monica
- Bouffet, Phoebe
- Burke, Charles and Katherine
- Client, Sample
- Deer, Olivia and Wayne
- Dylan, Lily and Bob
- Esposito, Jeremy and Lorrie
- FP, Katie and Tim
- Franklin, Benjamin and Deborah

Press Ctrl or Shift while clicking to select multiple clients

Please note: An example of when you may use Private Clients is if you're sharing all Clients with your staff, but don't want them to see the Client profile you created for yourself, which contains your information. In this case, you can hide your "Client" self so only you, as the advisor, have access to it.

Individual Sharing Rules

1. To create a rule to allow individual users to view specific Clients, click **Create Rule**.

eMoney Home Clients Connections Analytics Applications More Settings Help Sign Out

Go back to Settings

Settings

- Preferences
- My Info
- General
- Sharing Rules
- Alliance Partners
- Alerts
- Client History
- Branding
- Monte Carlo
- Lead Capture
- Marketing
- Security

Client Sharing Rules

The sharing of client data must be performed through this page. Sharing your username and password with another person is strictly prohibited.

Share All Clients

Add a user to the list below to give them access to all of your clients

No users have been granted access to all clients.

Private Clients

Add a client to the list below to hide them from all users. Private clients take precedence over all other sharing rules.

No clients have been made private.

Individual Sharing Rules

Create a rule to allow individual users to view specific clients

No individual sharing rules have been created.

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Sharing Rules

- First, select the **Client(s)** to share, then choose the **user** to share them with. If you do not see the correct user in the populated list, you will need to enter their **eMoney username** in the open field. Lastly, click **Share**.

Individual Sharing Rules

Set up sharing rules to allow individual users to view specific clients.

Clients to share:

- ALVIN, DAMON and DRISCOLL
- Bing, Chandler and Monica
- Bouffet, Phoebe
- Burke, Charles and Katherine**
- Client, Sample
- Deer, Olivia and Wayne
- Dylan, Lily and Bob
- Esposito, Jeremy and Lorrie
- FP, Katie and Tim
- Franklin, Benjamin and Deborah
- Geller, Ross and Rachel
- Goolia, Julia
- Guy, New
- Hansen, Caitlin and Parker
- Insurance/Esate, Jeremy and Lorrie
- Jackson, Steven and Suzie
- Johnson, Client and Spouse
- McIntosh, Bob and D

Press Ctrl or Shift while clicking to select multiple clients

Choose the users to share with:

- [All Users in My Office]
- Brown, Katherine
- Knope, Leslie**
- Schrute, Dwight
- Swanson, Ron

Press Ctrl or Shift while clicking to select multiple users

To share with a user outside of your office you must know their username.

Username:

Share
Cancel

Please note: You do not have the **Delegate Client Management** option when using Individual Sharing Rules. This means the user(s) you select in this area will not be able to create/delete Clients on your behalf, set up and manage Client websites, manage your advisor connections and manage your advisor investment assumptions.

Here's an example of how each Sharing Rule will look when set up.

Settings

- Preferences
- My Info
- General
- Sharing Rules**
- Alliance Partners
- Alerts
- Client History
- Branding
- Monte Carlo
- Lead Capture

- Security
- Change Password
- Change Secret
- Additional Security

- Fact Defaults
- Assumptions - Growth Rates
- Assumptions - Misc
- Assumptions - Tax

Client Sharing Rules

The sharing of client data must be performed through this page. Sharing your username and password with another person is strictly prohibited.

Share All Clients

Add a user to the list below to give them access to all of your clients

User	User Name	As a Delegate?	
Brown, Katherine	analyticsadvisor	Yes	
Knope, Leslie	assistantbeta	No	
Schrute, Dwight	kgarrickab	Yes	
Swanson, Ron	mmurdockab	Yes	

[Add User](#)

Private Clients

Add a client to the list below to hide them from all users. Private clients take precedence over all other sharing rules.

ALVIN, DAMON and DRISCOLL	
Edwards, Katherine and David	

[Hide Client](#)

Individual Sharing Rules

Create a rule to allow individual users to view specific clients

Client	Shared To	
Bouffet, Phoebe	Swanson, Ron (PlannerTeale)	

[Create Rule](#)