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.

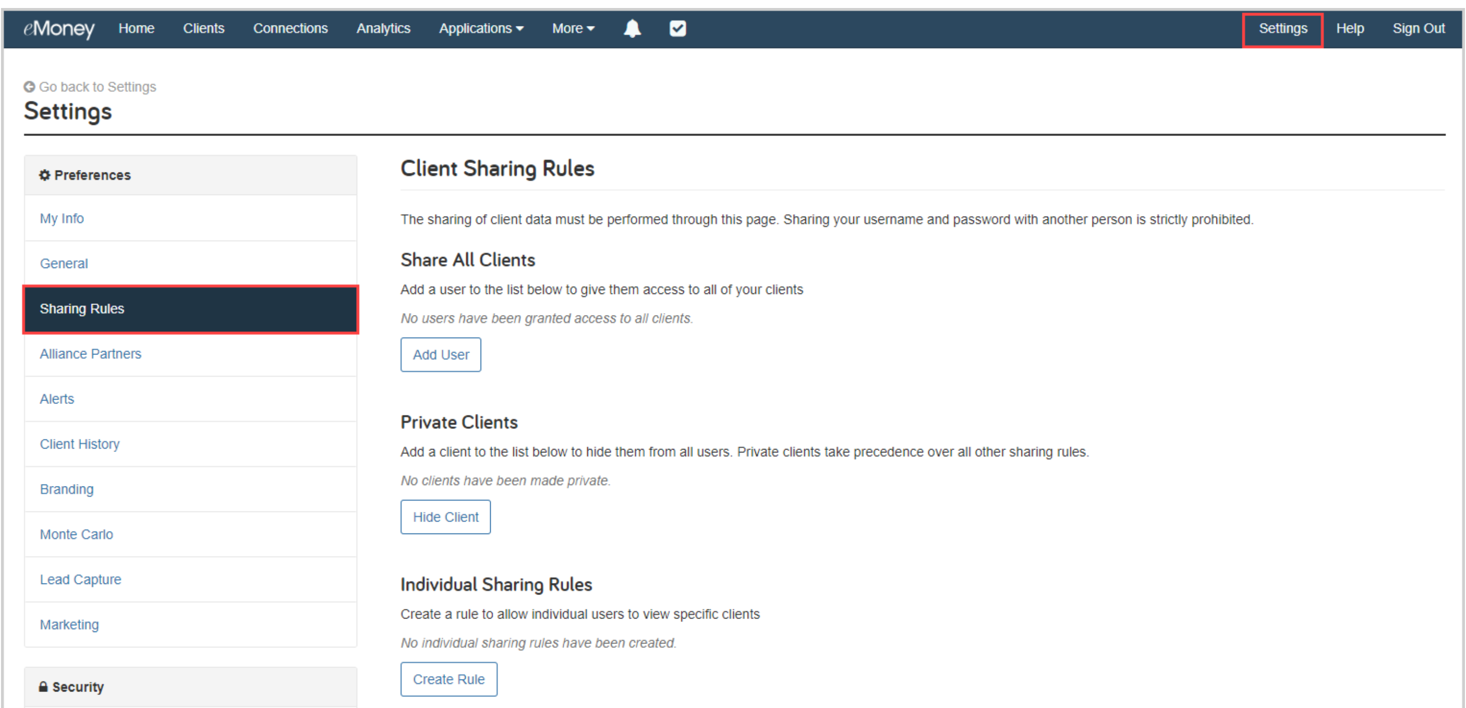
Three types of Sharing Rules:

- **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.**



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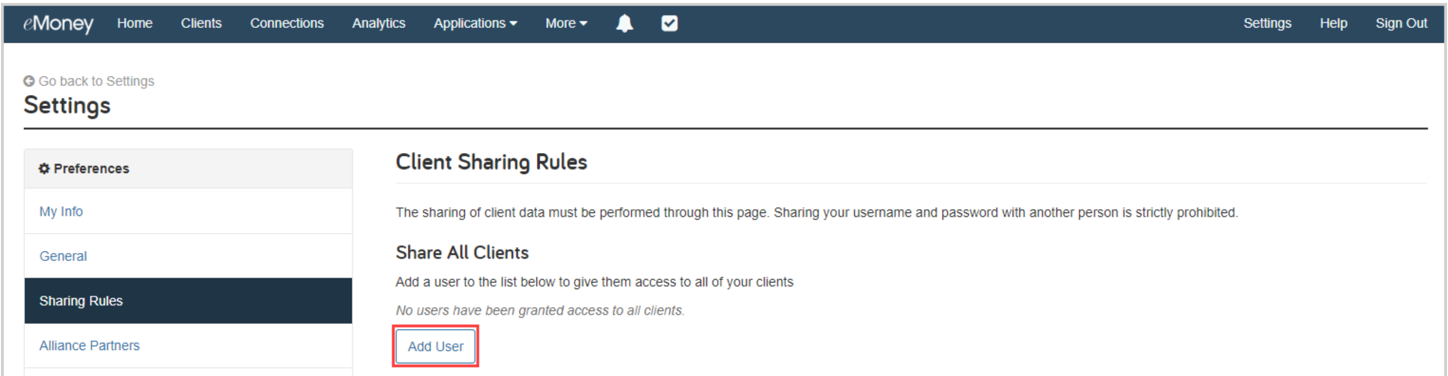
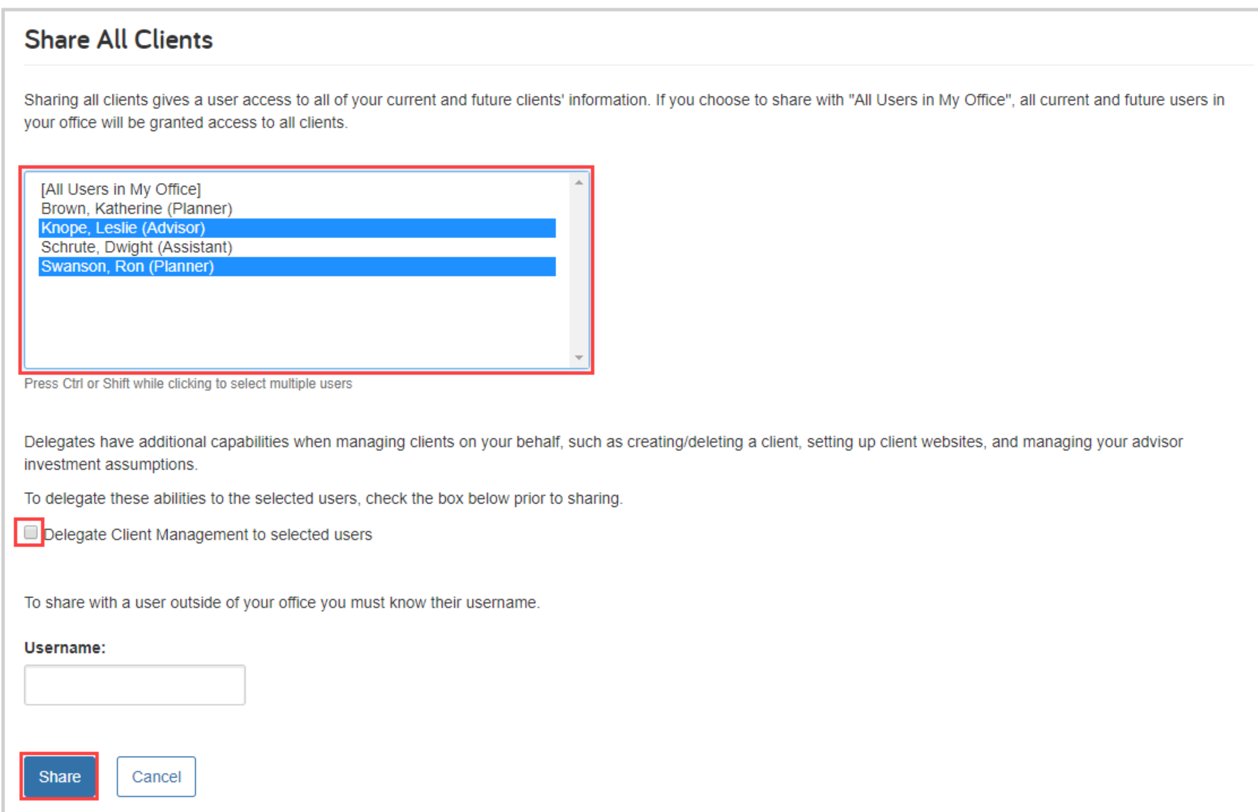
Share All Clients

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



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.**



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].**

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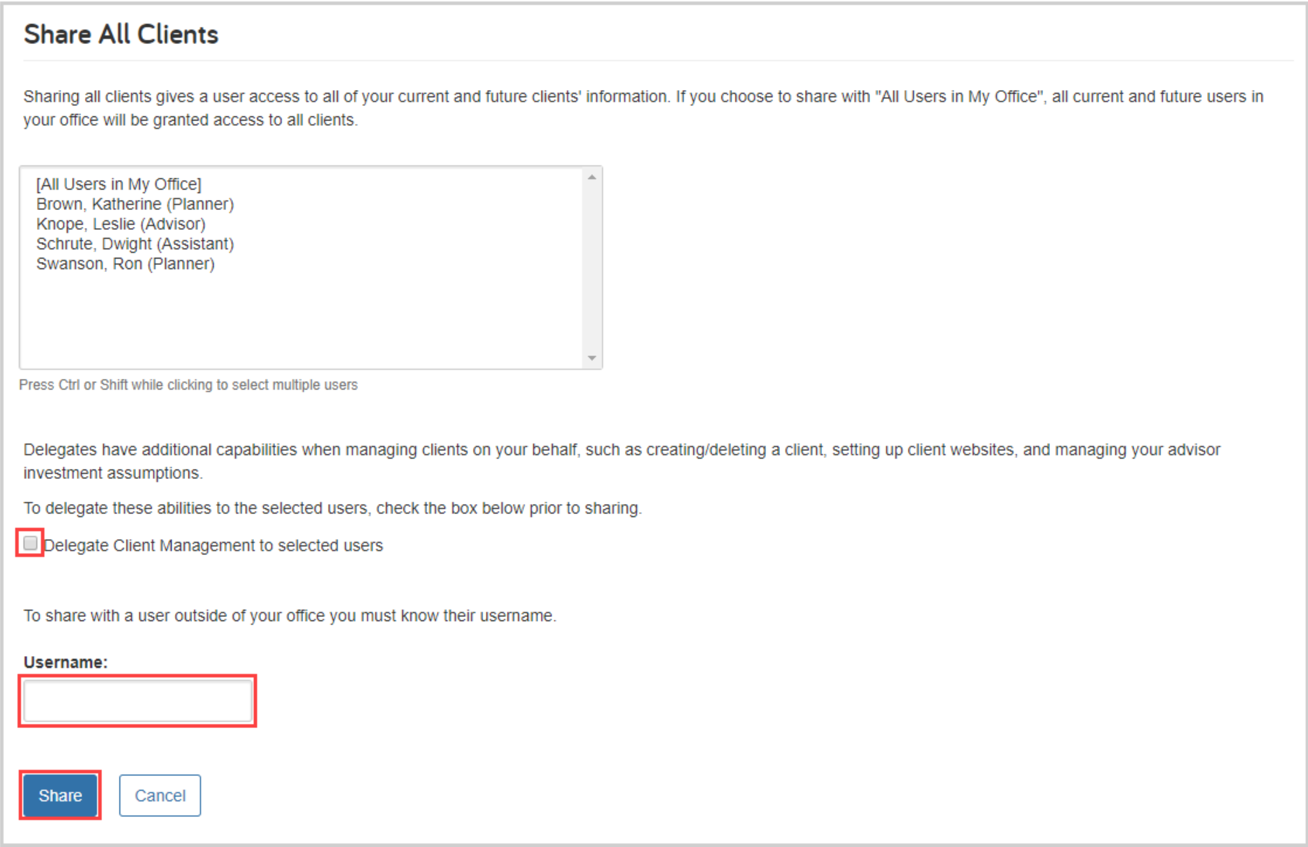
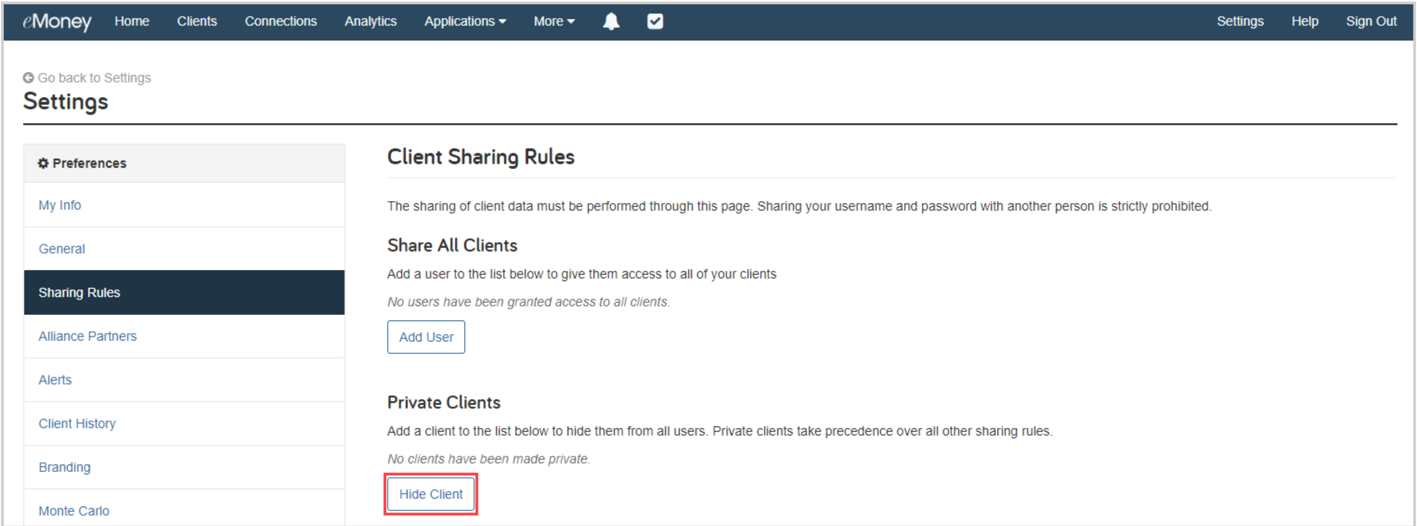
3. If you do not see the correct user in the populated list, you will need to enter their **eMoney username** in the open field. You can make this user a delegate if needed by checking the **box**, then click **Share.**



Private Clients

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



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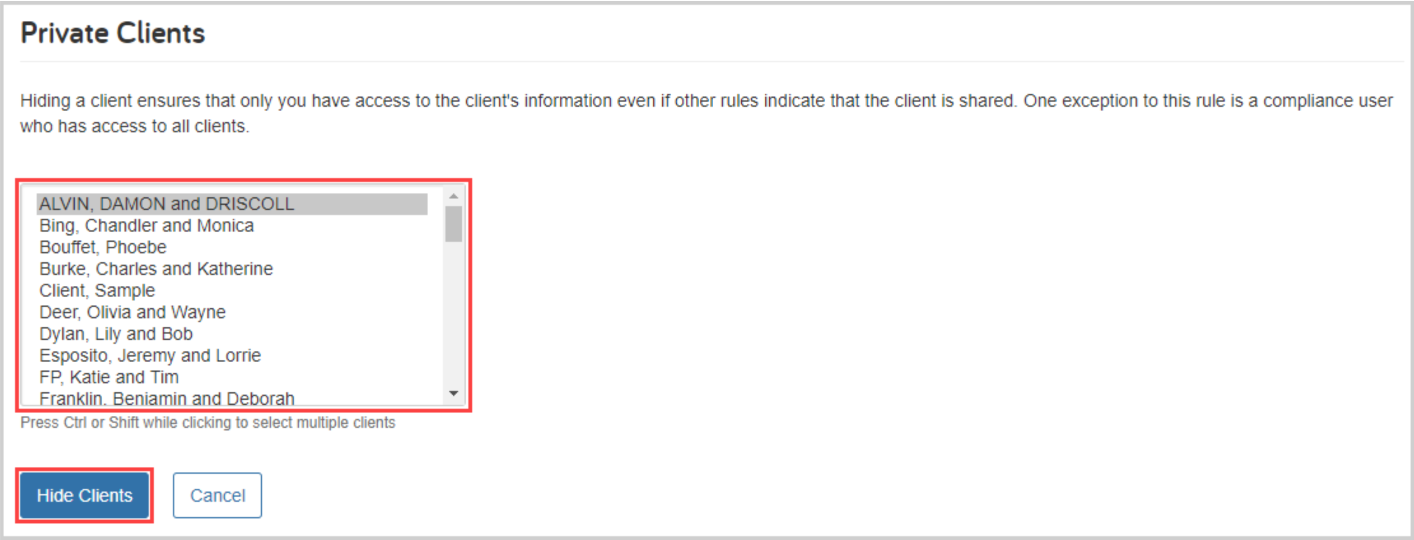
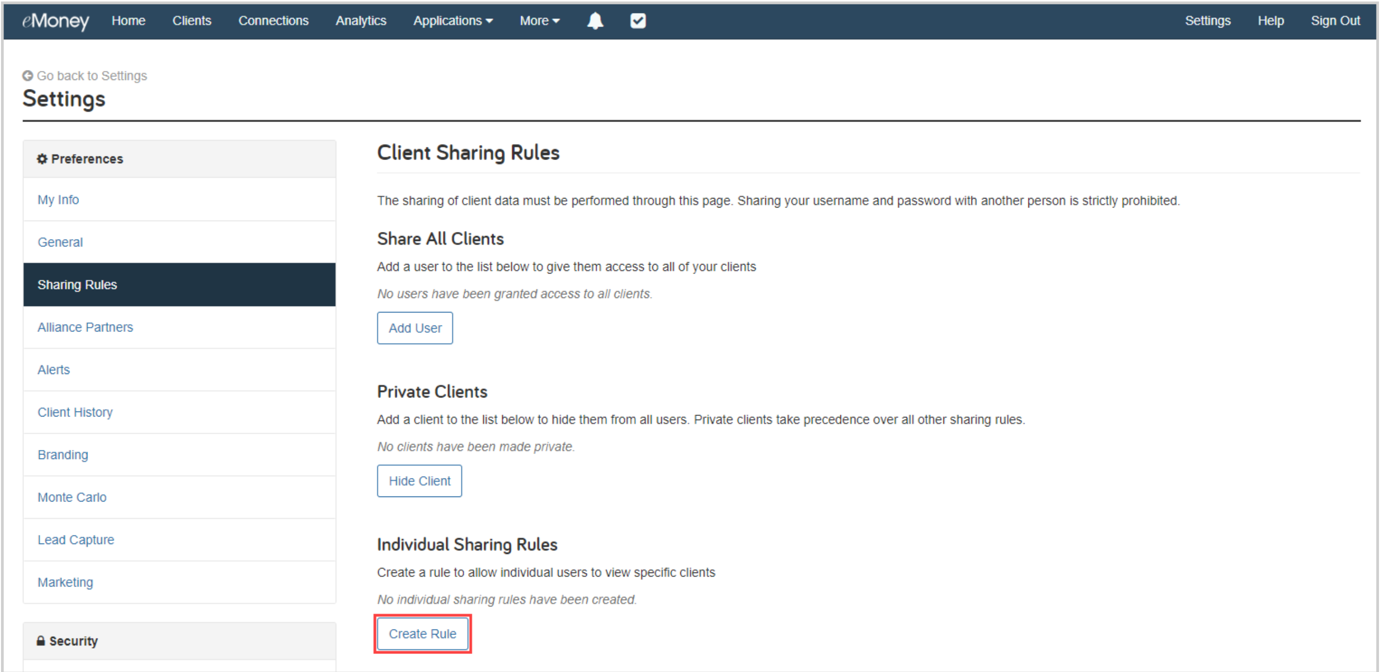
2. Select the Client(s) you'd like to hide from others, then click **Hide Clients.**



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.**



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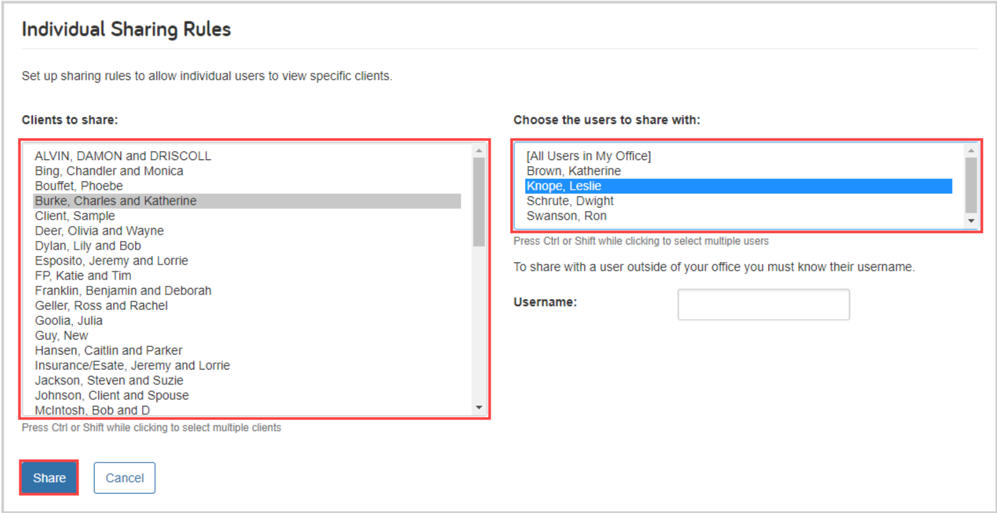
2. First, select the **Client(s)** to share, then choose the **user** to share them with. If you do not see the correct user in the populated list, you will need to enter their **eMoney username** in the open field. Lastly, click **Share.**



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.