

## HOW TO / manage restricted access

To restrict a marketing piece, click on the template title to get to the details page. Check the box marked “Restricted”. Click “Save”. No sales agents can see restricted pieces, unless they are specifically given access.

To give a sales agent or group access, hover over “Marketing Pieces” > “Manage Restricted Access” > “Manage Group/Sales Agent Access”. From here you can locate the restricted template, and drag over any agents or groups that you want to have access. On the right side of the box, you will see a list of Private Marketing Pieces. Select the marketing piece to which you would like to grant access. Drag and drop the name(s) of the sales agent or group accounts to whom you wish to grant access. Now, sales agent in this list can see the marketing piece.

Note: if a marketing piece is restricted, it will not send (even if it is scheduled).

