GrowthWheel CRM

User Guide

How to assign or reassign the Primary Advisor
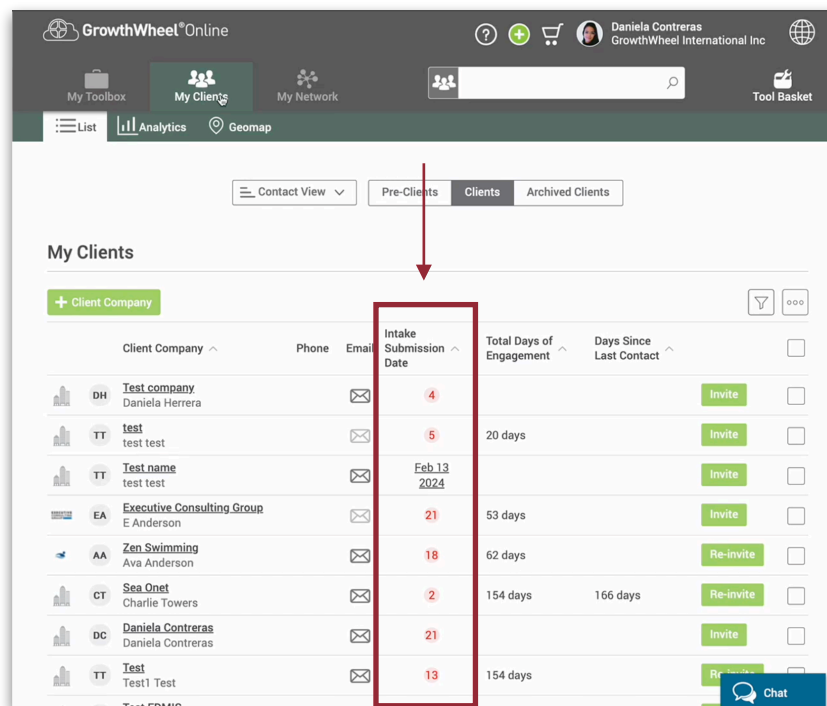
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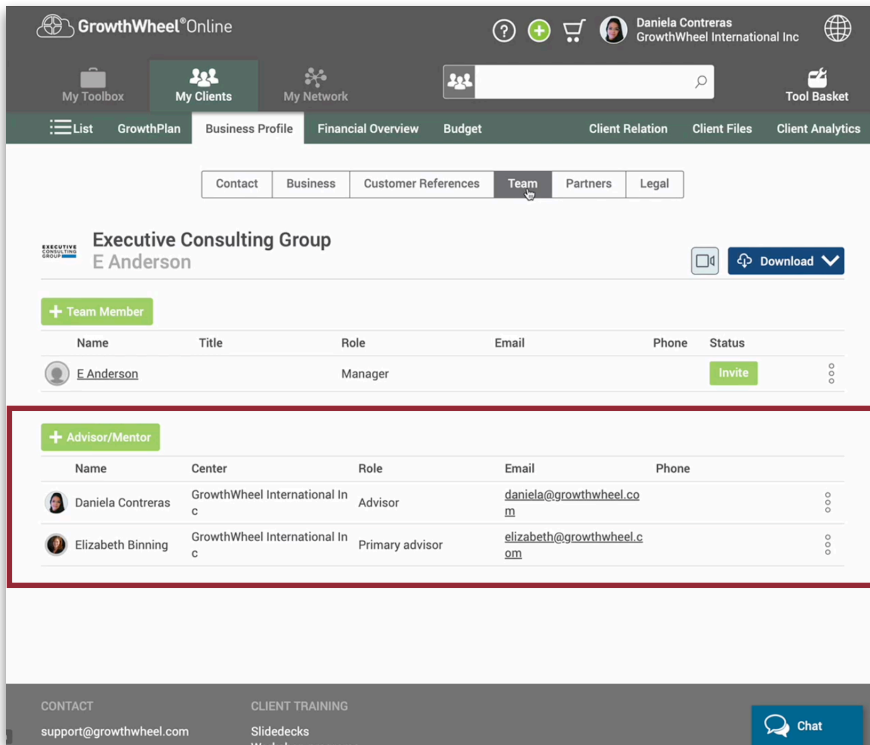Last updated date:
March 18, 2024

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NEW INTAKE SUBMISSION DATE ON CONTACT VIEW

- The first thing that you're going to notice if you go to your client list, is that we added a new **intake submission date.**

- This field shows you the date when the intake form of your clients was submitted.

- If a client has not submitted their form (it was manually created or imported) you will see a red indicator with missing fields on their profile.
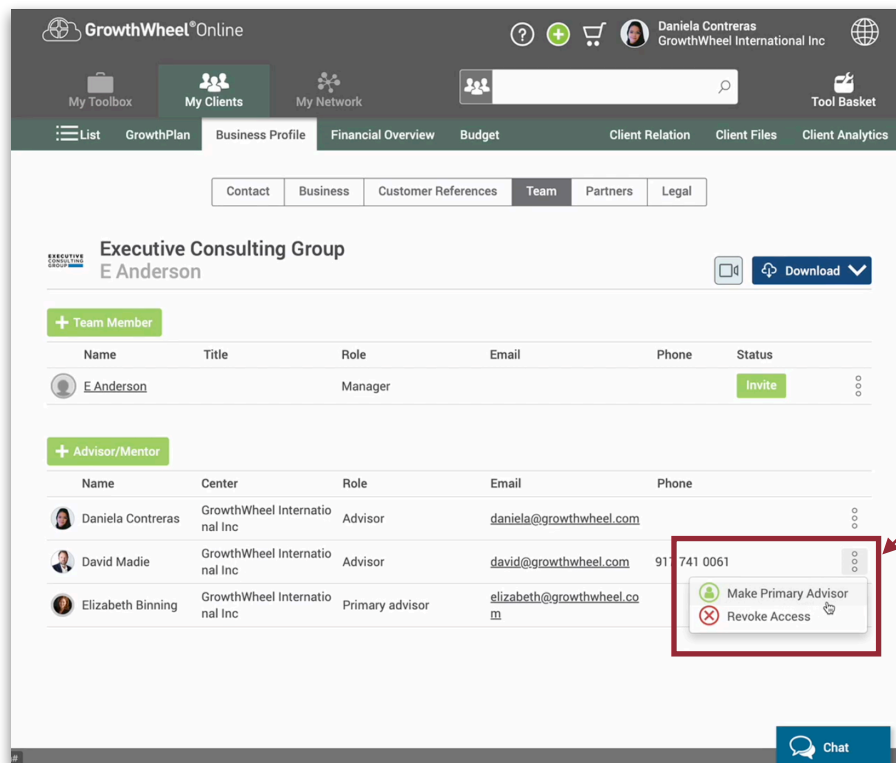

ASSIGN OR REASSIGN THE PRIMARY ADVISORS FOR CLIENTS

- Go to a client's profile that just submitted their intake form and you wish to change the primary advisor that they are associated with

- Go to the client's profile under the team page on the business profile menu, and on the advisor section search for the advisor that you want to add onto this client.

- Once it's on the list, now if you click the three-dot menu on the right, and you're going to notice that you have a new option called **Make Primary Advisor.** That way, if you click on it, you're going to see that now this user is the primary advisor.

- It's indicated also with a gray ring outside the picture. You can also switch it to the previous advisor if necessary.
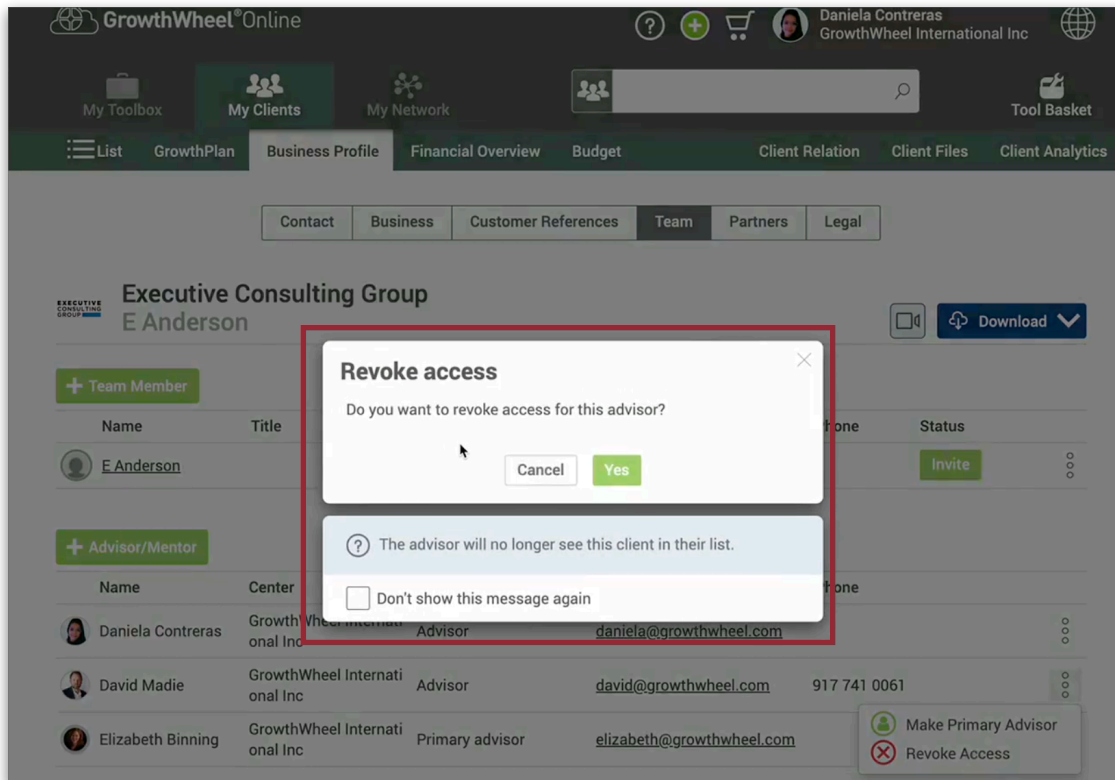

- We also added the option to **revoke access,** in case that you don't longer want this advisor to see this client on their advisor list.

- Click Yes, and you will see that the advisor is no longer on this particular client profile.

- An implication of revoking the client's or the advisor's permissions to these clients is that they will not see it under their My Client list, therefore they will not be able to see any information or add any interactions to this client.

- And also another implication of changing the primary advisor is that if you add a advisor from another center, this client will be transferred to that center. **This only applies if you are a network with more than one center.**

- **If you want a client to be associated with one center, make sure the primary advisor assigned is from this center. You can add other advisors from other centers, as part of their team of advisors, to work with the client if needed.**

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