

## **How To Manage Delegates**

## WHAT ARE DELEGATES?

A delegate is a person authorised to represent others, or a task or responsibility entrusted to another person.

In LinkFM a delegate is someone who is entrusted by the delegator to have the same access to their LinkFM account and to complete tasks acting as the delegator.

The Managing Delegates function in LinkFM allows users to appoint delegate(s) to act on their behalf to view tasks, and/or close tasks.

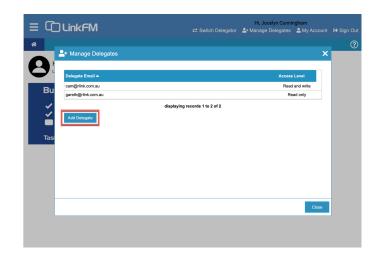
Delegates are usually assigned when you want another person to manage your duties, act on your behalf or just be a backup in case you cannot complete your tasks to ensure the tasks are always taken care of.

## TO ADD A DELEGATE

- Have the person you are delegating to register their email address with LinkFM.
- 2. Log in to your LinkFM account
- On the homepage, click on Manage Delegates in the top right corner of the screen



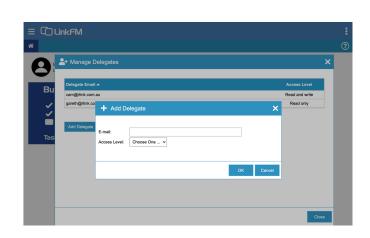
4. Click Add Delegate





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- Enter the email address of the delegate from step 1
- Adjust the delegate's access level to Read Only or Read and Write



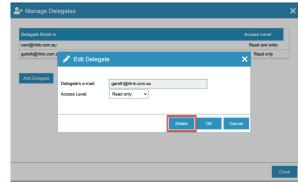
#### The Access Levels:

Read Only - The delegate can only view tasks

Read and Write - The delegate can both view and complete tasks

## TO EDIT/REMOVE A DELEGATE

- On the LinkFM homepage, click on Manage Delegates in the top right of your screen
- 2. The Manage Delegator window will pop up
- Click on the email on the delegate you wish to edit or delete
- In the Edit Delegate pop up window you can change the user's level of access or you can delete their email so they can no longer access your account
- To change a delegated email address you need to delete the user and add a new delegate with the correct/updated email address



THE DELETE BUTTON: USE THIS BUTTON
TO DELETE A DELEGATE