



Guide

ADP Marketplace ESI - How to manage profiles on the Partner Portal

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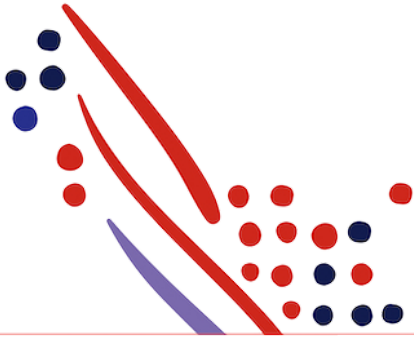


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Chapter 1

Overview

This guide provides an overview on how to manage profiles on the Partner Portal

The Partner portal is more than just a Lead Management system, but a place where you and your team can find a ton of information. It's extremely important that you make sure a larger portion of your team has access to the site, not just the sales team or those who manage leads.

On the partner portal, individuals from your organization can be a Member Administrator, Lead Administrator and Account Profile Administrator. If you designate someone as a Lead Administrator, you give that individual visibility to all leads that come in. If they are not a Lead Administrator they can only see what is assigned to them.

A Member Administrator can delegate an individual as a Lead Administrator, Member Administrator or Account Profile Administrator. Account Profile Administrator can change information on the organization.

Intended Audience

This document is intended for:

- Partners

Prerequisite

You need a Netsecure account to be able to login to the Partner portal and have the Administrative Privilege of Member Administrator to be able to perform the actions described in this document.



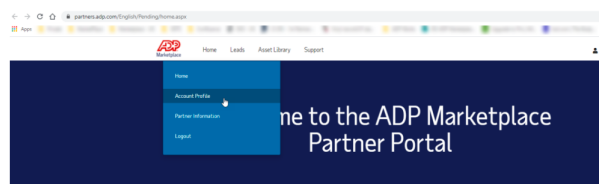
Note

This account is created by the ADP Marketplace ESI Integration team in the startup phase of the Partner on-boarding.

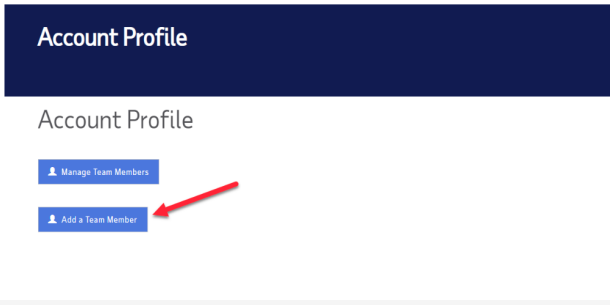
Chapter 2


Adding a team member

1. Navigate to <https://partners.adp.com> and login using your credentials.
2. Select **'Home'** and click on **'Account Profile'**



3. Select **'Add a Team Member'**



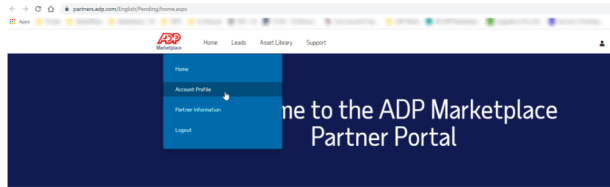
 **Note**
Adding a team member requires a Netsecure account.

4. Enter all the necessary account information and select '**Add Member**'

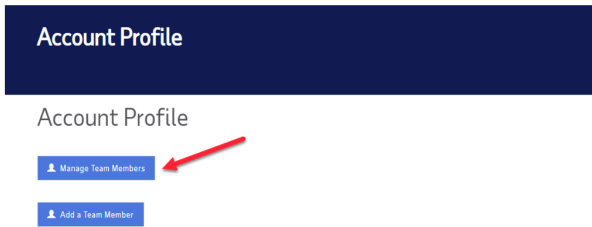
Chapter 3

Manage team members

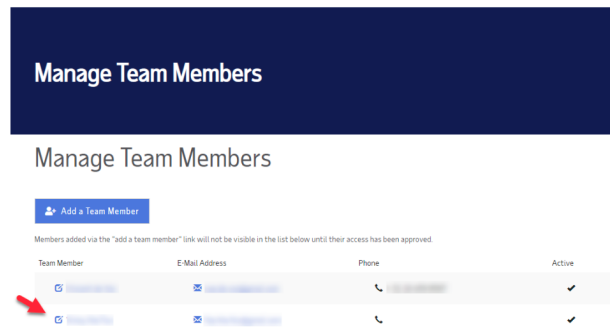
1. Navigate to <https://partners.adp.com> and login using your credentials.
2. Select '**Home**' and click on '**Account Profile**'



3. Select '**Manage Team Member**'



4. Select the '**Team Member**'



5. Select the correct '**Administrative Privileges**' and select '**Update Member**'

Administrative Privileges

- Member Administrator
- Lead Administrator
- Account Profile Administrator

Update Member

Cancel

6.