



Advisor Mobile Portal (AMP) App Installation Instructions

Introducing the Advisor Mobile Portal (AMP) app.

The Advisors Mobile Portal application allows access to Financial Professional (FP) sales productivity tools on Intune managed devices. Access to these tools via the protected mobile application:

- provides more flexibility to access information “on the go” for Financial Professionals
- utilizes the Edge Mobile browser for all accessible tools (except Salesforce)
- minimizes data leakage risk of confidential information posed via access from the public internet.

Please note although you can download the AMP to an Intune managed cell phone, it is optimized and recommended for use on a tablet device.

This document outlines the steps to update the mobile Edge Browser (if needed) and to install the AMP application on your Intune managed device.

1. Intune Installation

If Intune has not already been installed on your device, refer to the Intune installation instructions before downloading AMP.

Click here for

- iOS install [instructions](#)
- Android install [instructions](#)

Note: The Intune installation includes the installation of the mobile browser Edge to your device.

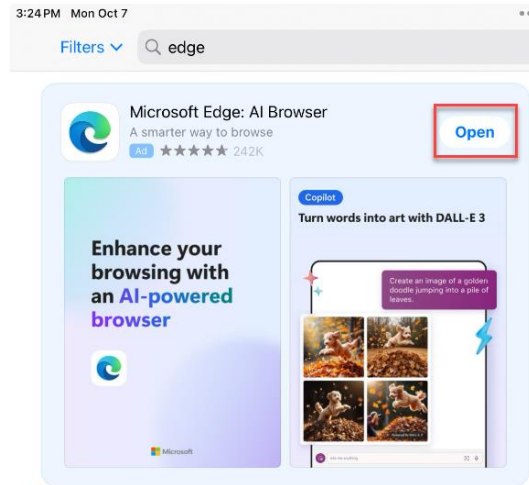
2. Update Microsoft Edge Browser settings

•Step 1: Update Edge browser (if required)

- Upgrade Edge browser on mobile devices if required. Search for Microsoft Edge in your device's app store to find the app and you will see an open or update button.
 - Select “Update” if displayed. Once the update has been successfully installed you will see the latest Edge browser version.
 - If “Open” is displayed your Edge browser is at the latest version and update is not required.



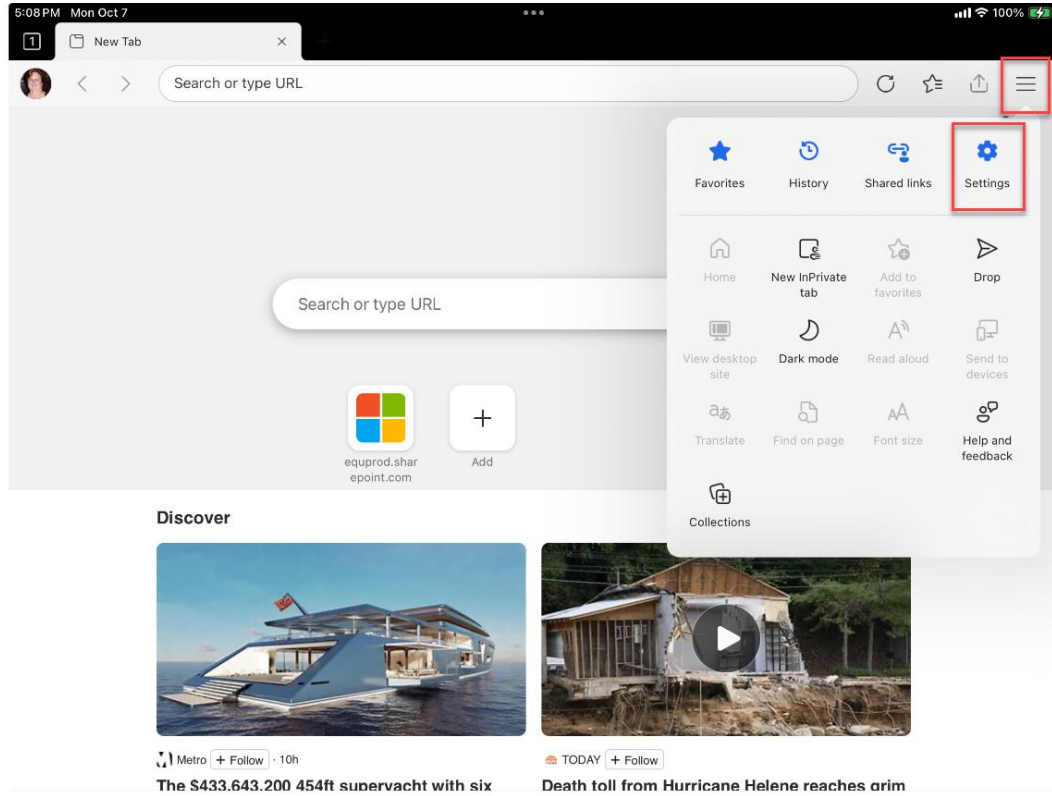
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- **Step 2: Restart the mobile device once the update has been installed successfully.**
- **Step 3: Confirm Browser Privacy and Security Settings**
 - In Edge, select the hamburger menu on upper right-hand side corner of the screen > Select Settings

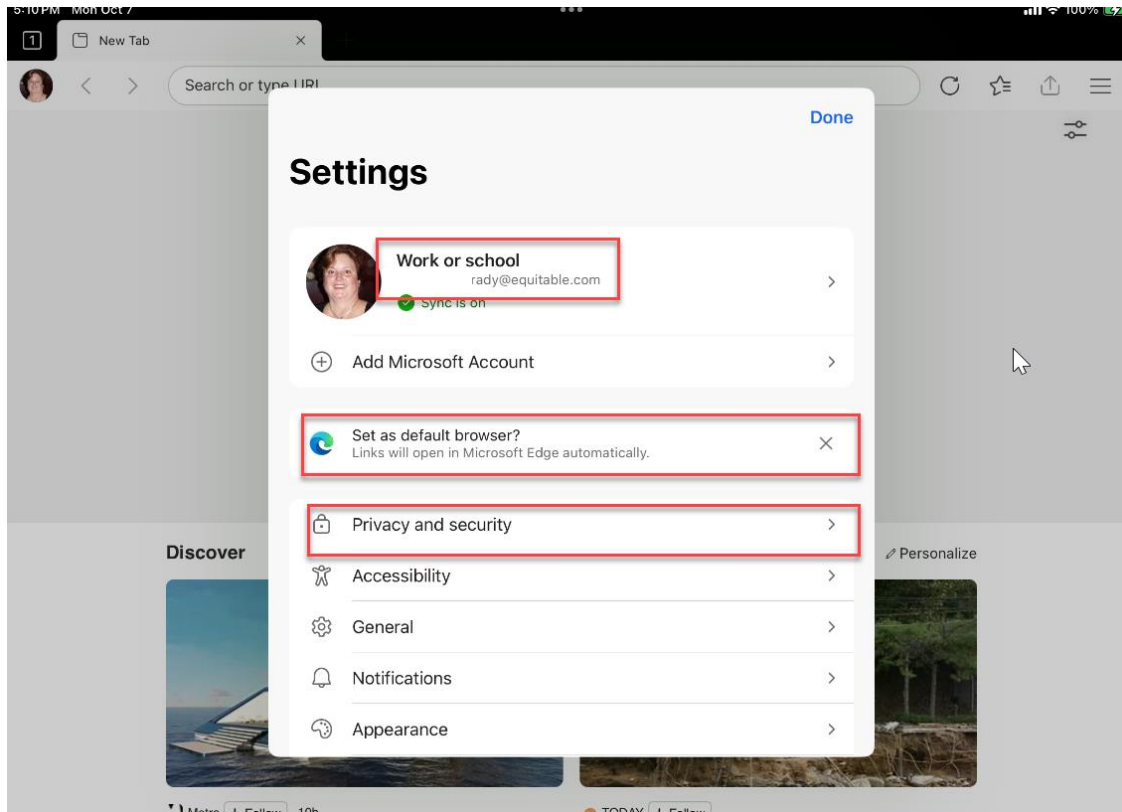


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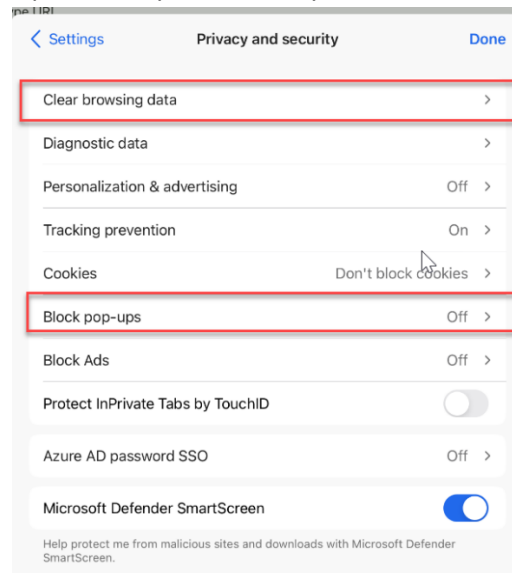




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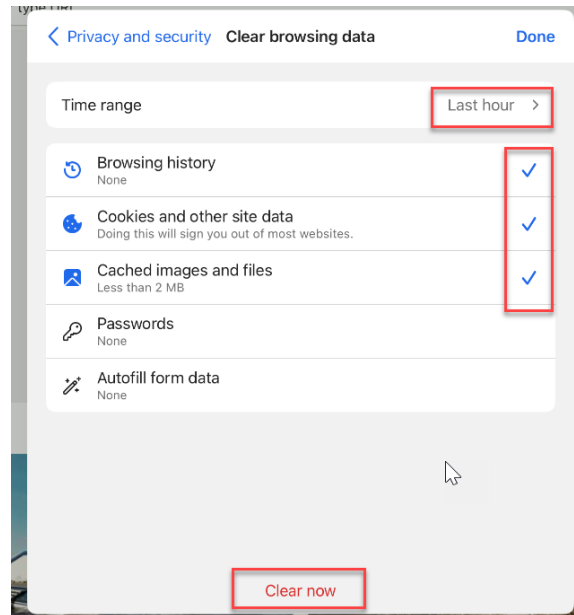
- **Select Business Account:** If you have multiple Microsoft accounts, be sure that it is your business account connected.
- **Default Browser:** Ensure that Edge is not set as default browser.
- **Open Privacy and Security**





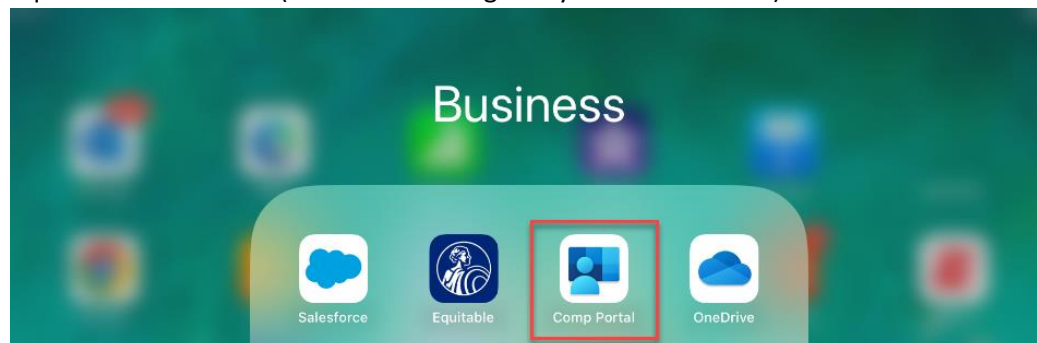
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- **Block pop-ups** – set this to “off” to allow all applications within AMP to work correctly.
- **Clear Browsing Data:**
 - Clear Browsing Data – be sure that Browsing History, Cookies and other site data and Cached images and files are selected > Set Time range as All Time > Clear Now



4. Advisor Mobile Portal (AMP) app installation

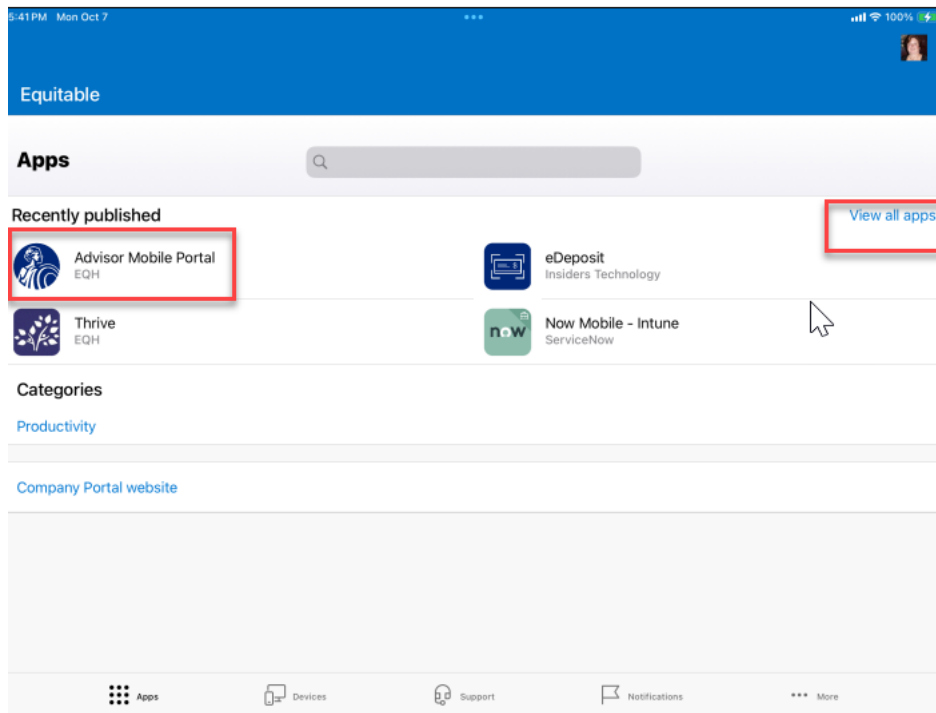
- Step 1: Go to Company Portal app on your mobile device and sign in using your Equitable Windows ID (the ID used to log into your PC and email)



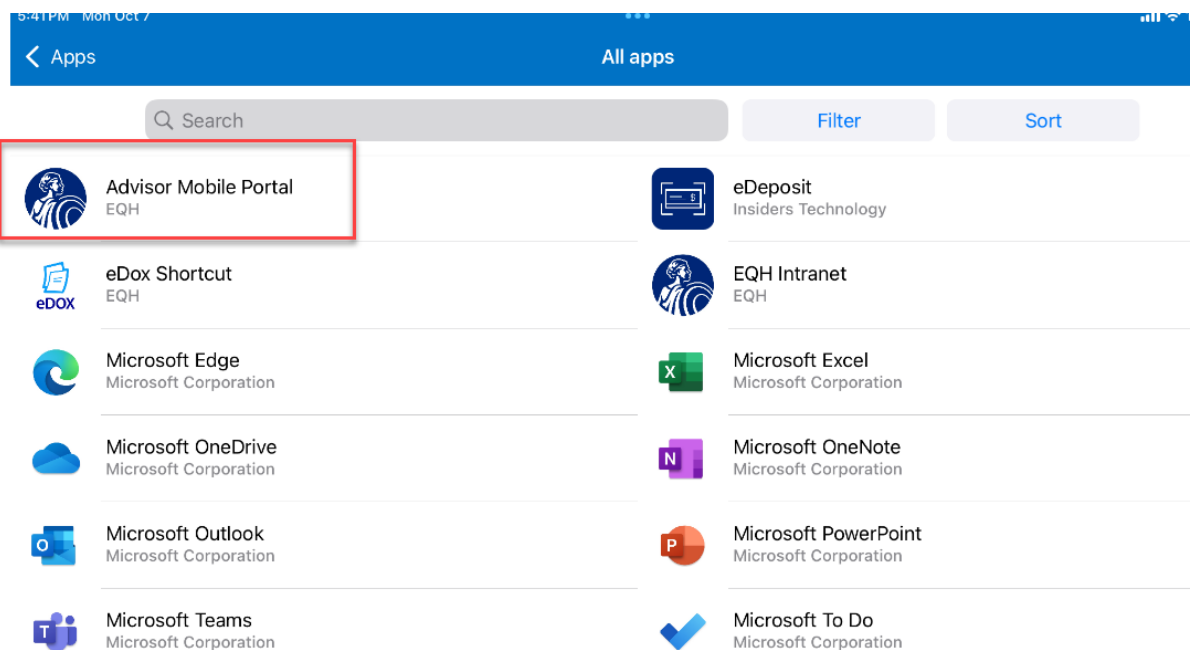


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- Step 2: Search for “Advisor Mobile Portal” app and select Install button to install the app.



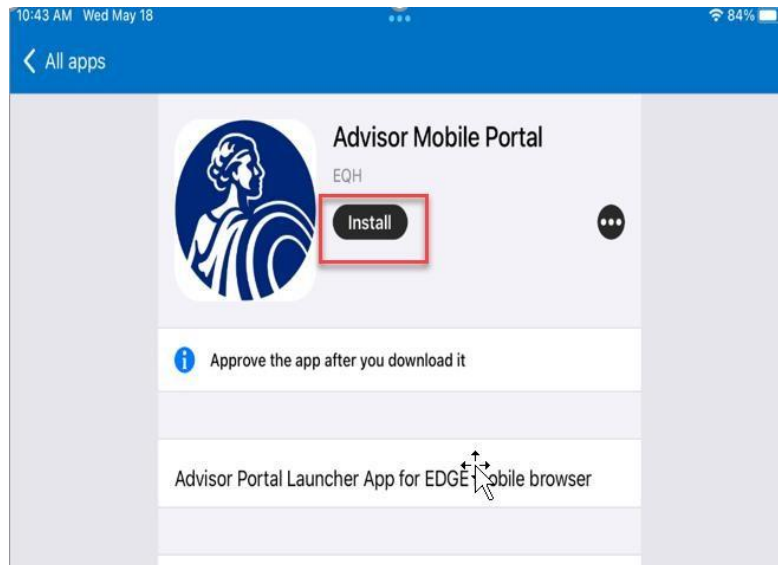
- Note if the AMP app is not displayed in “Recently Published,” select “View all apps” link.



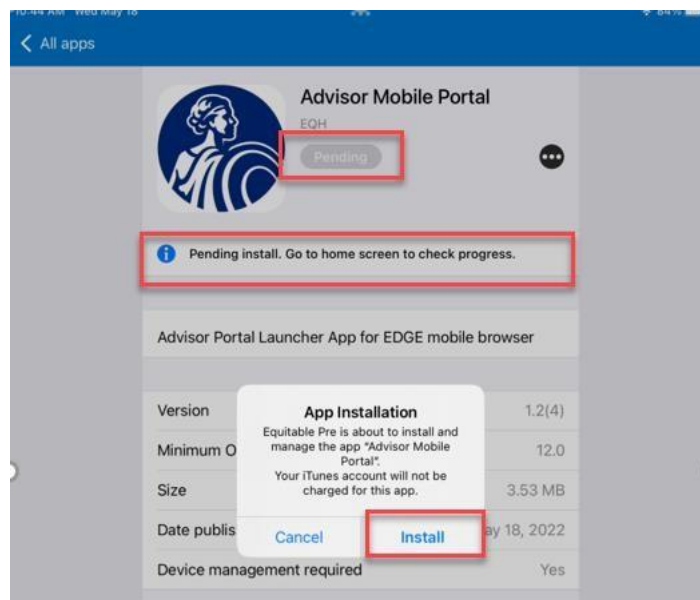


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- Step 3: Go to your mobile apps and find the “Advisor Mobile Portal” app. Click on Install.



Step 4: Click on “Install” to proceed.



When install is complete you will see the AMP icon on home page



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5. Navigating through the AMP application

- Click the "AMP" app to launch the tool's home page.

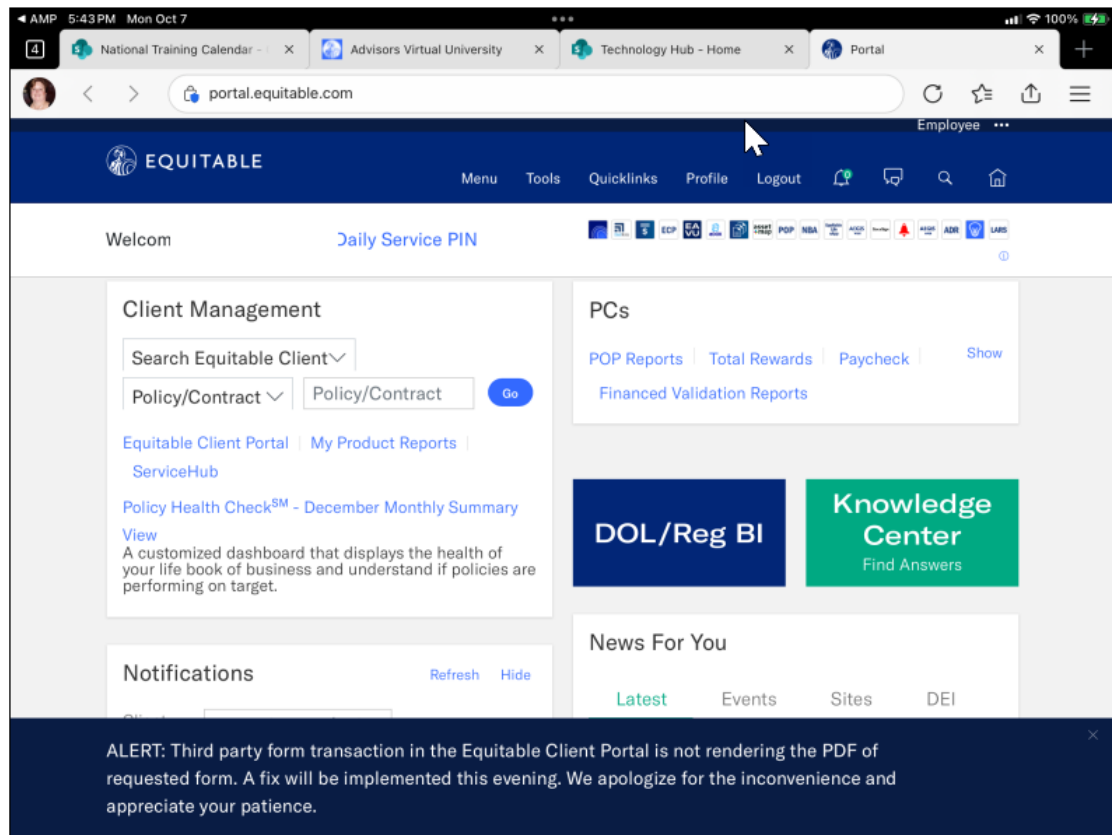


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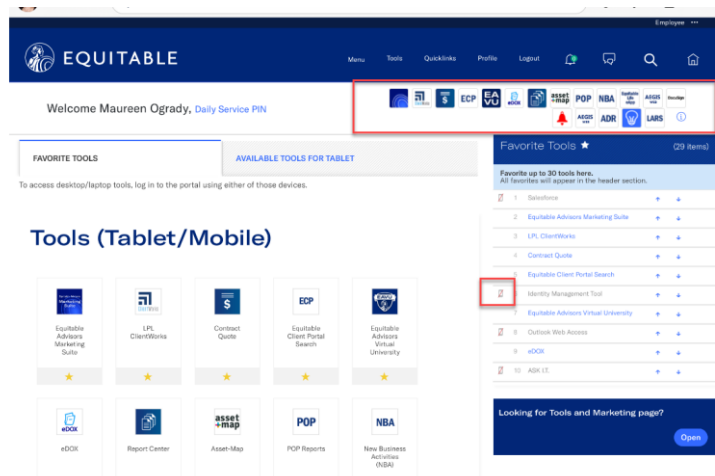
- The main navigational elements are:
 - Equitable portal button launches single sign into the Advisor Portal



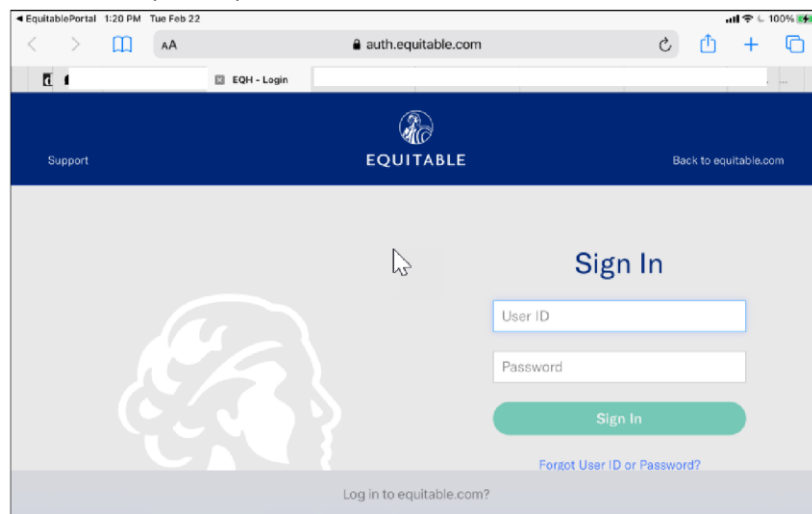
- Note: on the portal your favorites toolbar will only display tools that are available via the AMP application. In your favorites, you will only be able to launch tools that are available on the AMP application. If a tool is only available on the desktop the favorites link will display an  icon.



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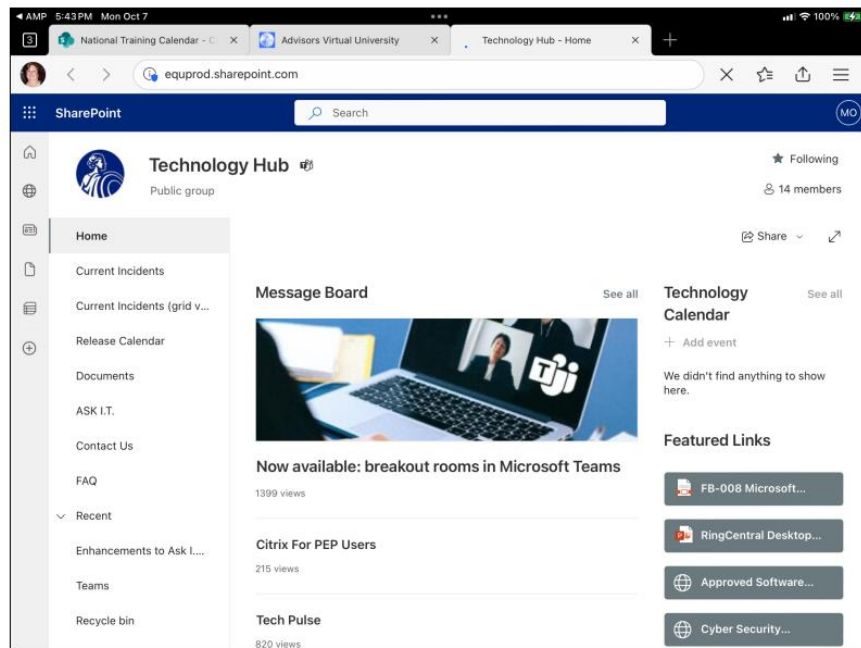
- To see all tools available on a tablet device, select “Available Tools for the Tablet.”
- Salesforce button launches the Salesforce application
 - Note: A system prompt will request that you log into equitable.com and utilize DUO authentication to launch Salesforce. Be sure to use your equitable.com User ID and Password



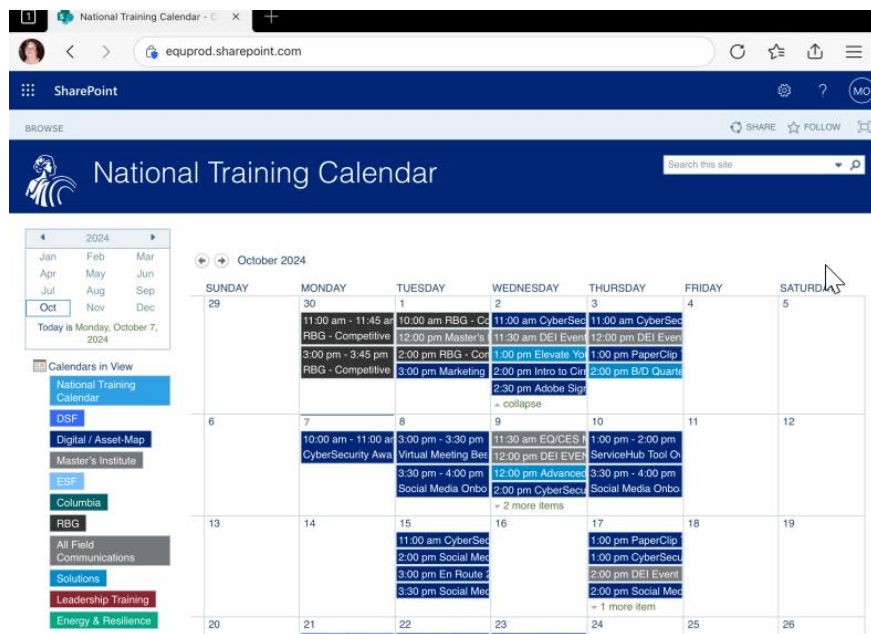
- Tech HUB button launches single sign into the Technology Hub



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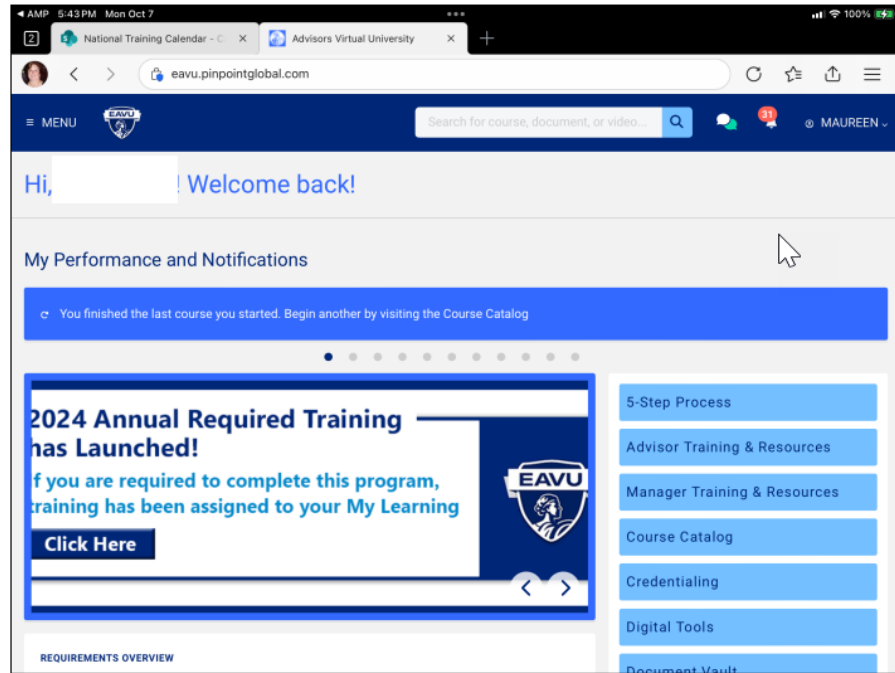
- National Training Calendar button launches single sign into the National Training Calendar



- EAVU launches to the EAVU home page.



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Support Issues:

For all technical questions, please:

- Contact Ask I.T. via chat at <https://equitable.service-now.com/sp> From the home page, select **Chat with Ask I.T.** to ask your question or have a ticket opened referencing the Advisor Mobile Portal app so ticket is referred to correct support team.