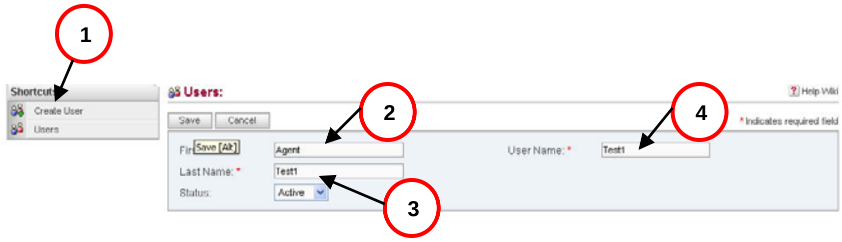
Creating Teams:

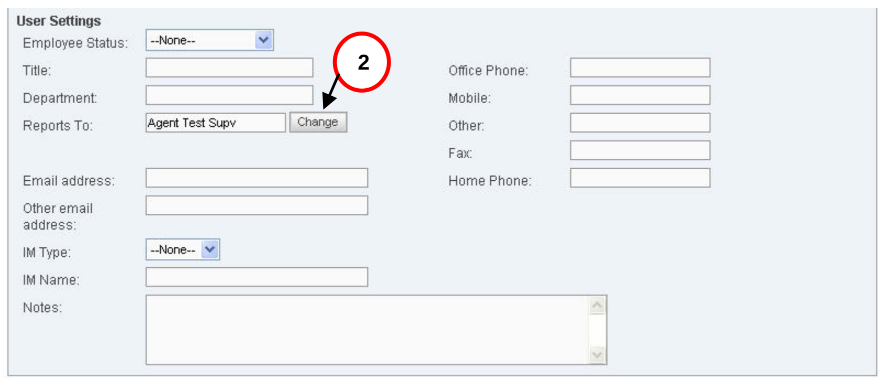
a. Create Users:



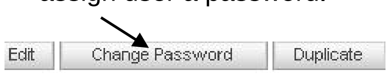
1. **Click Create User** from Shortcuts Menu
2. **Enter** User first name
3. **Enter** User last name
4. **Enter** User Name

NOTE: For documentation purposes we entered Agent as first name, Test1 as last name and test1 for user name.

b. Identifying Who a User Reports To:



1. **Scroll down page** to User Settings
2. **Click Change** in Reports To: setting and **Select** who this user reports to. We selected Agent Test Supv.
3. **Scroll** to **top** of page.
4. **Click Change Password** and assign user a password.



5. **Click Save.** 

6. You will be returned to the Users Home Window.
7. **Repeat** steps **a. and b.** until you have created all users.

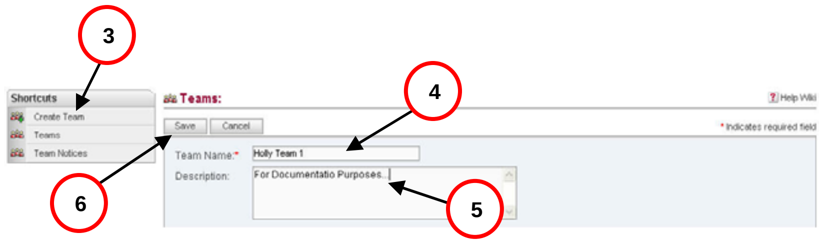
NOTE: We created Agent Test Supv, Agent Test1 and Agent Test2 for documentation purposes

HINT: It is always recommended that you fill in as much information regarding this user as possible, for documentation purposes we only filled in the required fields.

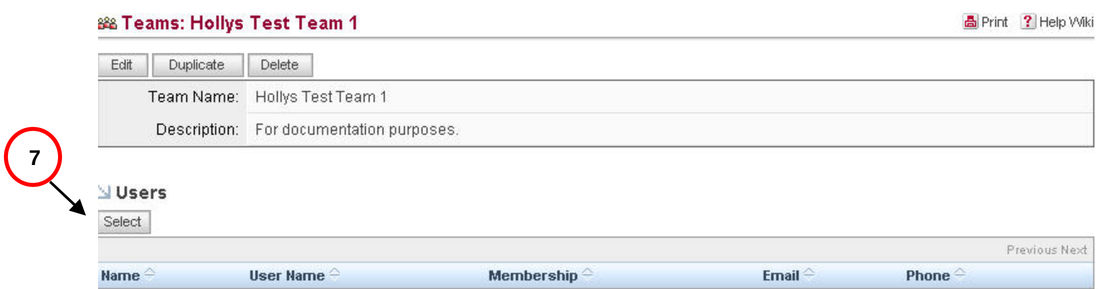
c. Creating Teams and Assigning Users:

Note: You do not need to add supv/manger to team; the system automatically adds them based on who you assigned them to in above Step b.

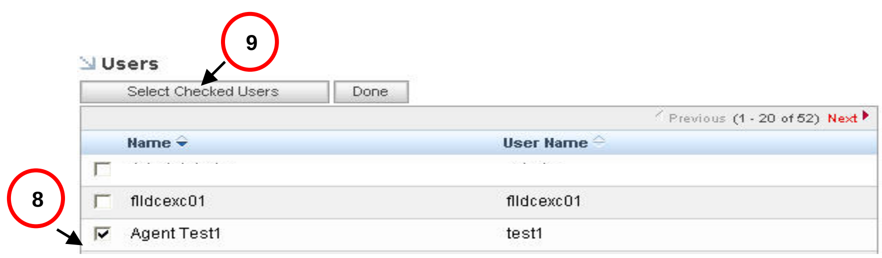
1. **Click Admin**
2. **Click Team Management**
3. **Click Create Team** from Shortcuts menu
4. **Enter name** for new team in Team Name field. For documentation purposes, we entered Holly Team 1.
5. **Enter a description** for this new team.
6. **Click Save**.
   The Teams window displays showing your new team.



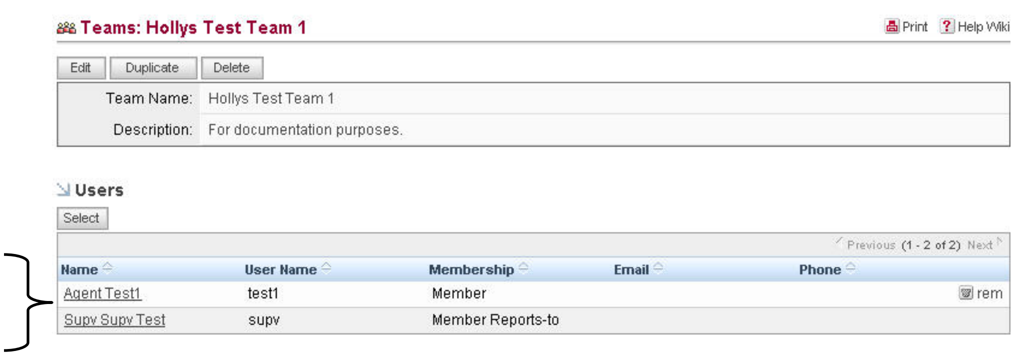
7. **Click Users.**



8. Check users from list of available users.
9. Click Select Checked Users.
10. Repeat steps 3 through 9 until you have added users to **all new teams**.
11. Your new team will be displayed showing users assigned to that team.

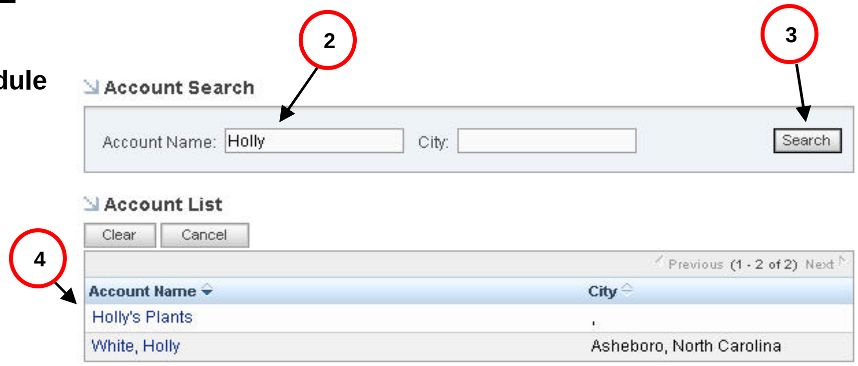


NOTE: We only select Agent Test1 from the user list in above Step 9, but Supv is also listed as a user. This is because teams automatically assigns whoever you identify the user reporting to in the User Management tool.

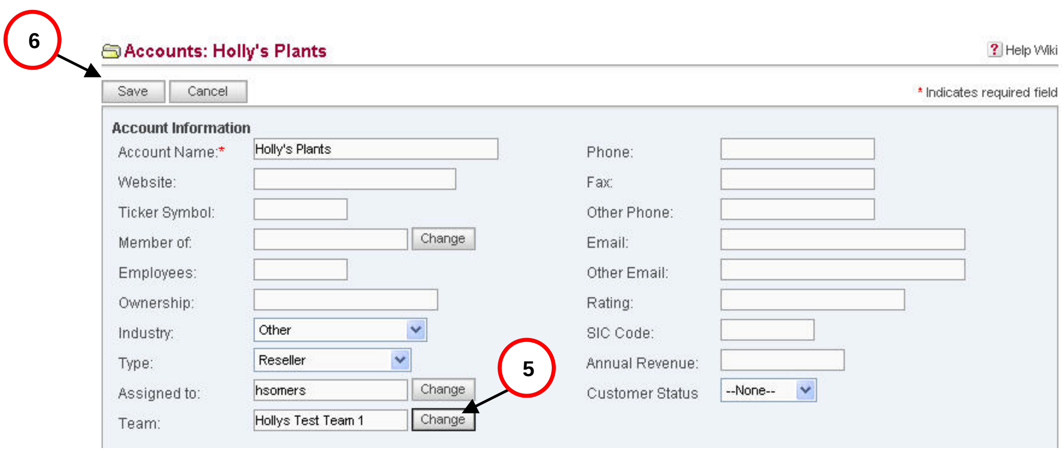


d. Assigning Teams to Existing Accounts:

1. **Click Accounts Tab Module**
2. **Enter Account** Name in Account Search Window
3. **Click Search**
4. **Double click** on Account Name



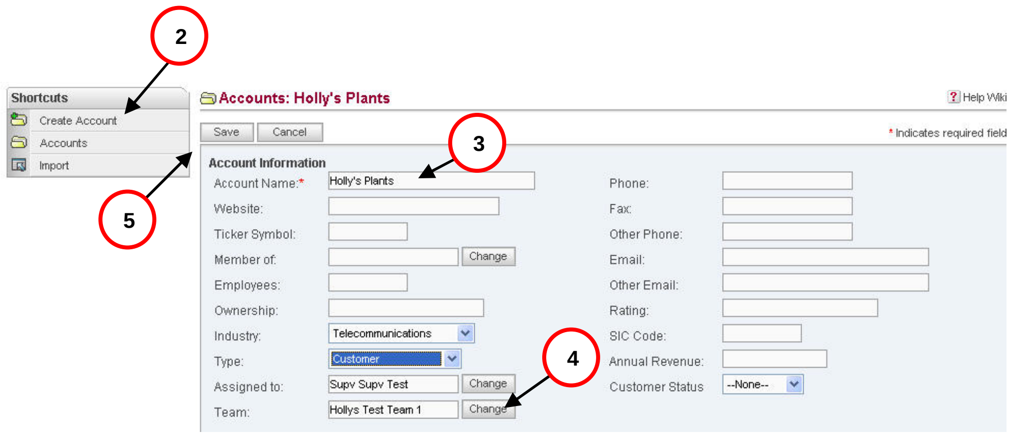
5. **Click Edit.**
6. **Click Change** in Team field and select Team from list.
7. **Click Save.**



NOTE: This account will only be visible to the team it is assigned to.

e. Assigning Teams to New Accounts:

1. **Click Accounts Tab** Module**.**
2. **Create a new Account** in Shortcuts menu.
3. **Enter Account Name.**
4. **Click Change** and Select Team.
5. **Click Save.**



HINT: It is always recommended that you fill in as much information regarding this user as possible, for documentation purposes we only filled in the required fields.

NOTE: This account will only be visible to the team it is assigned to.