

## 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

The screenshot shows the 'Create User' form. Callout 1 points to the 'Create User' button in the 'Shortcuts' menu. Callout 2 points to the 'First Name' field containing 'Agent'. Callout 3 points to the 'Last Name' field containing 'Test1'. Callout 4 points to the 'User Name' field containing 'Test1'. The 'Status' dropdown is set to 'Active'. There are 'Save' and 'Cancel' buttons at the top of the form.

**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.

Edit **Change Password** Duplicate

The screenshot shows the 'User Settings' form. Callout 2 points to the 'Change' button next to the 'Reports To' field, which is set to 'Agent Test Supv'. Other fields include 'Employee Status' (set to '--None--'), 'Title', 'Department', 'Email address', 'Other email address', 'IM Type' (set to '--None--'), 'IM Name', and 'Notes'. There are also fields for 'Office Phone', 'Mobile', 'Fax', and 'Home Phone'.

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.

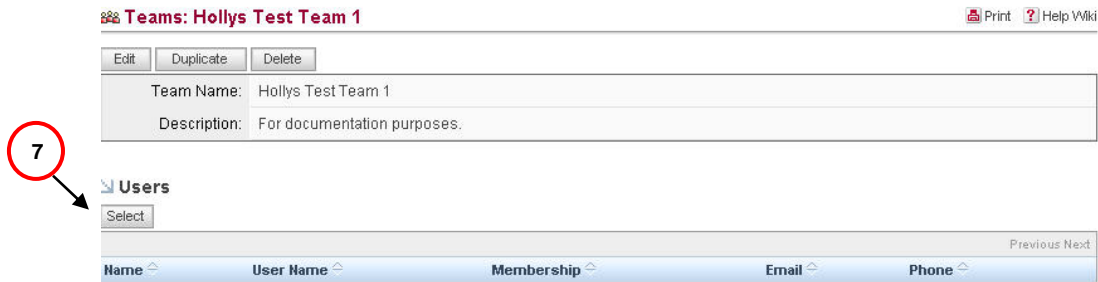
**NOTE:** We created Agent Test Supv, Agent Test1 and Agent Test2 for documentation purposes

**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.

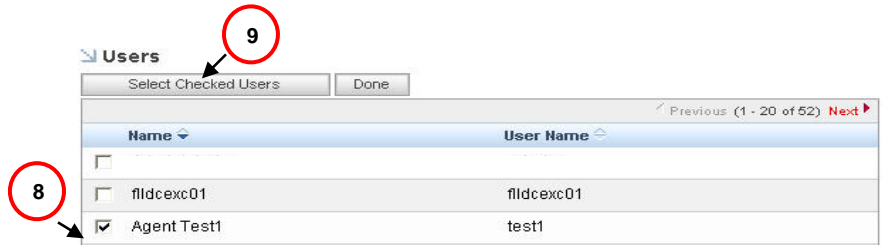
c. Creating Teams and Assigning Users:

**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.

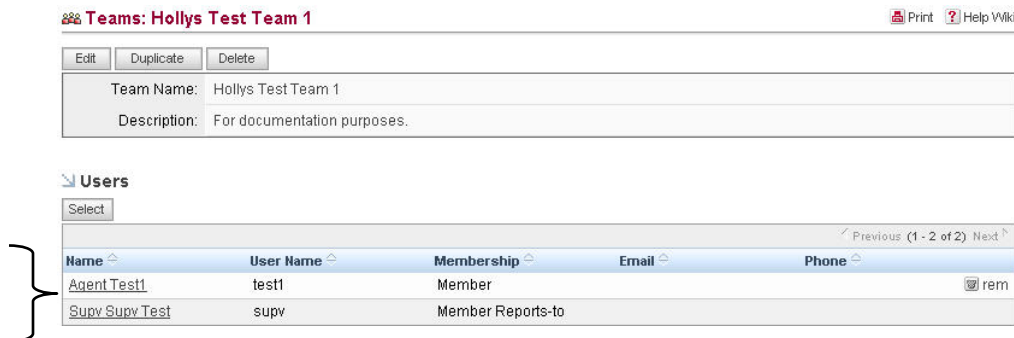
1. Click Admin
  2. Click Team Management
  3. Click Create Team from Shortcuts menu
  4. Enter name for new team in Team Name field. For documentation purposes, we entered Holly Team 1.
  5. Enter a description for this new team.
  6. Click Save.
- The Teams window displays showing your new team.
7. 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

Account Search

Account Name: Holly City: Search

Account List

Account Name	City
Holly's Plants	.
White, Holly	Asheboro, North Carolina

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

Accounts: Holly's Plants

Save Cancel

\* Indicates required field

Account Information

Account Name: Holly's Plants Phone: Website: Fax: Ticker Symbol: Other Phone: Member of: Change Email: Employees: Other Email: Ownership: Rating: Industry: Other SIC Code: Type: Reseller Annual Revenue: Assigned to: hsomers Change Customer Status: --None-- Team: Hollys Test Team 1 Change

**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.

The screenshot displays the 'Accounts: Holly's Plants' form in a CRM application. The form is titled 'Accounts: Holly's Plants' and includes a 'Help Wiki' link. The form is divided into two main sections: 'Account Information' and 'Contact Information'. The 'Account Information' section contains the following fields: Account Name (required, filled with 'Holly's Plants'), Website, Ticker Symbol, Member of (with a 'Change' button), Employees, Ownership, Industry (dropdown menu set to 'Telecommunications'), Type (dropdown menu set to 'Customer'), Assigned to (dropdown menu set to 'Supv Supv Test' with a 'Change' button), and Team (dropdown menu set to 'Hollys Test Team 1' with a 'Change' button). The 'Contact Information' section contains the following fields: Phone, Fax, Other Phone, Email, Other Email, Rating, SIC Code, Annual Revenue, and Customer Status (dropdown menu set to '--None--'). A red asterisk indicates that the Account Name field is required. The form is annotated with five red circles and arrows: 1. Circle 2 points to the 'Create Account' button in the 'Shortcuts' menu. 2. Circle 3 points to the 'Account Name' field. 3. Circle 4 points to the 'Change' button next to the 'Team' dropdown. 4. Circle 5 points to the 'Save' button. 5. Circle 5 also points to the 'Import' button in the 'Shortcuts' menu.

**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.