Enterprise - How to Create Sales Teams

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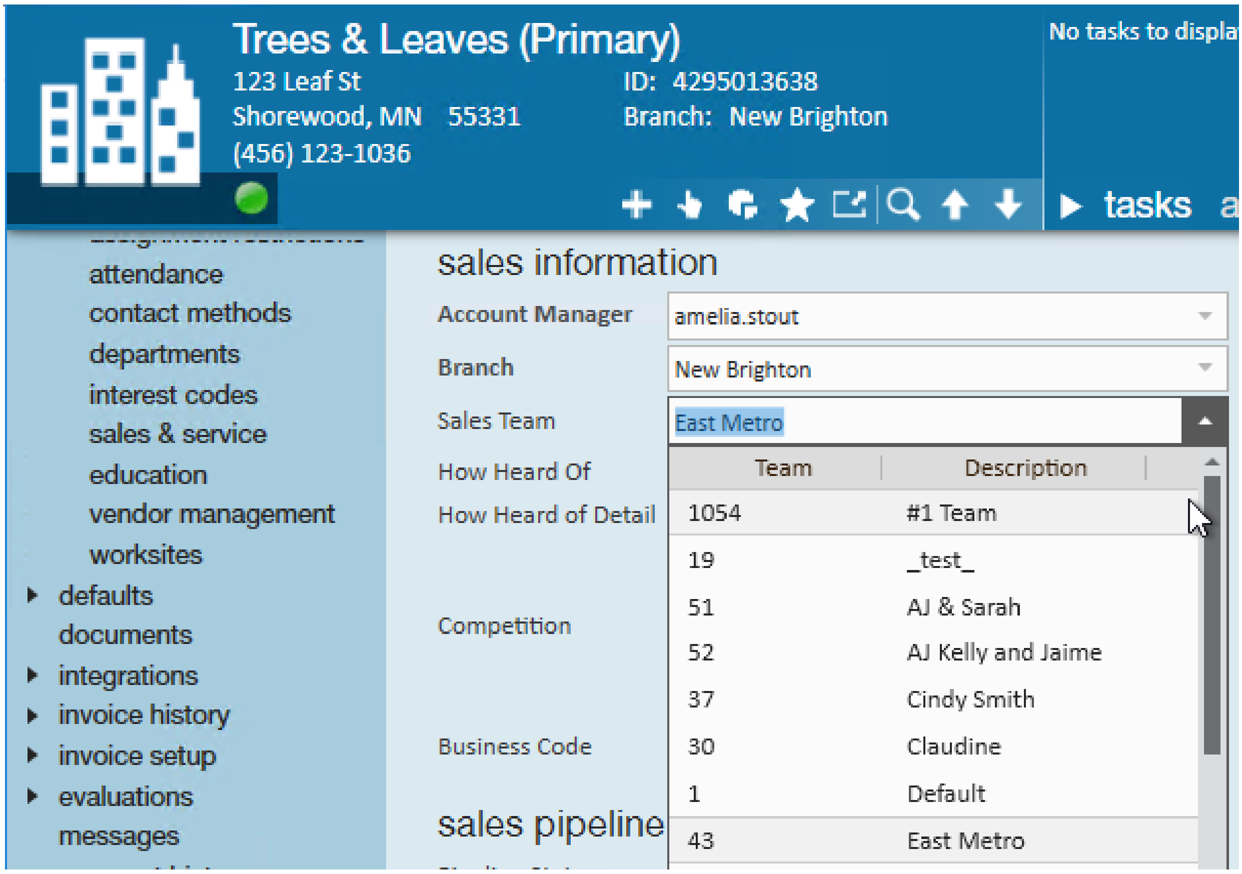
What are Sales Teams?

Sales teams denote a sales person or group of people on a customer, order, or assignment record. This field is used to pull or group a variety of reports and searches for customers or orders by sales.



First think about how you want to utilize sales teams: Will they be individual people or groups or a combination? We recommend making a list before you start adding them in Administration.

To learn more about sales teams check out Enterprise - Managing Sales and Service, Beyond - Managing Sales and Service, and Commission By Sales Team Report.

How to Add a Sales Team

Note Before you start adding sales teams, we recommend being at the highest Hierarchy you have available (whether that is entity, subsystem, or system) to ensure you have access to edit and see all options in administration.

1. Navigate to all options > administration
2. Select Sales Team on the left
3. Select the + in the upper right
4. Enter/review the following information:
    - **Active:** This checkbox should remain checked. Only active sales can be selected on a file
    - **Hier:** Determines where the sales team will exist and be accessible in your database. If this sales team is only applicable to one branch or entity, then you can set it to that branch or entity.
    - **Branch:** Select the associated branch this sales team is based out of or works closely with
    - **Sales Team Description:** The name of the sales team as you want it displayed in the system and on reports
5. Select Save

Note If a service rep can't find the sales team you just added, make sure you have them "Refresh their Hierarchy" by selecting their name in the upper right and clicking next and finish. This will refresh their system without forcing them to log out and log back in.

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