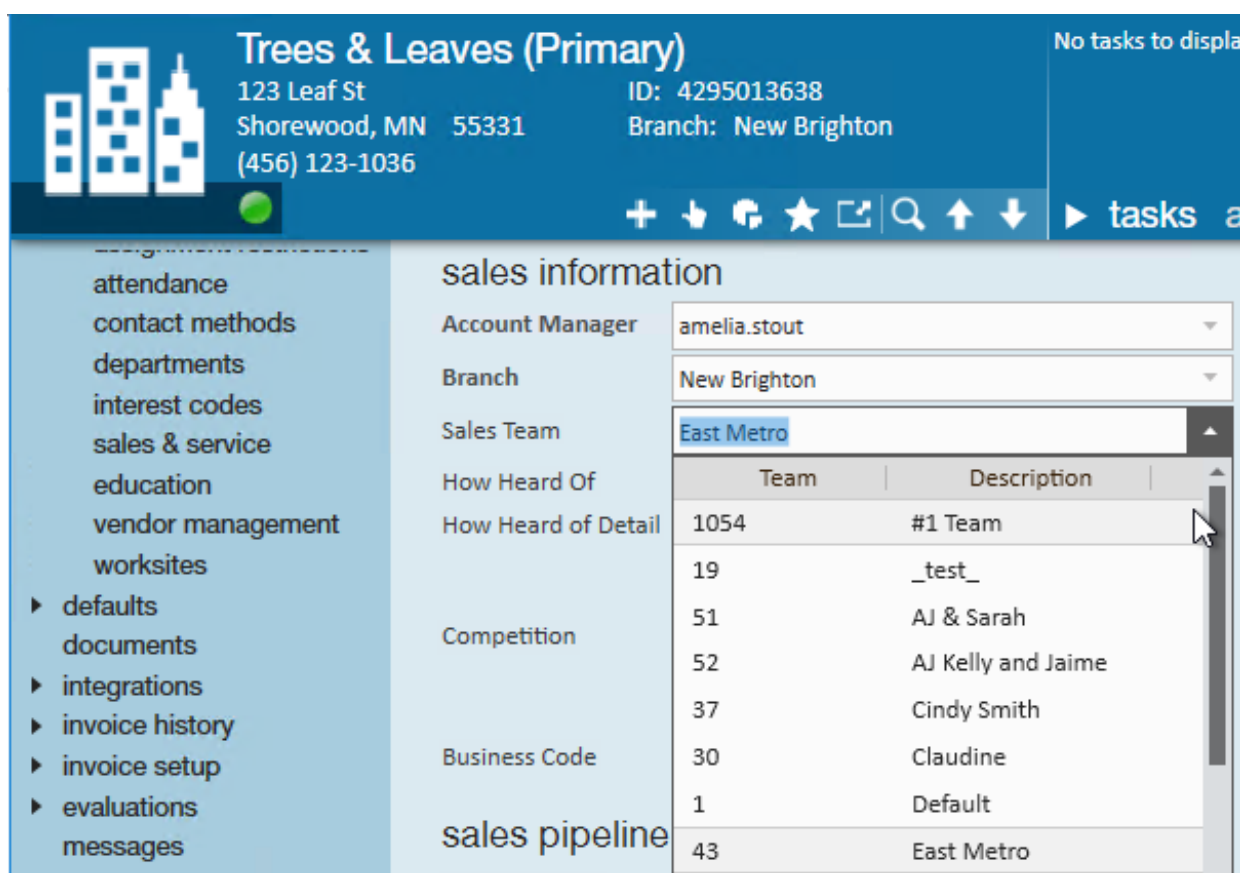


Enterprise - How to Create Sales Teams

Last Modified on 01/15/2020 10:52 am CST

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.



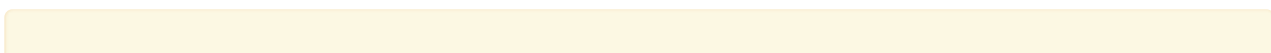
The screenshot shows a software interface for account management. The top header displays the account name 'Trees & Leaves (Primary)' and its address: '123 Leaf St, Shorewood, MN 55331, (456) 123-1036'. It also shows the account ID '4295013638' and the branch 'New Brighton'. A sidebar on the left lists various account management options such as 'attendance', 'contact methods', 'departments', 'interest codes', 'sales & service', 'education', 'vendor management', 'worksites', 'defaults', 'documents', 'integrations', 'invoice history', 'invoice setup', 'evaluations', and 'messages'. The main content area is titled 'sales information' and includes fields for 'Account Manager' (amelia.stout), 'Branch' (New Brighton), and 'Sales Team' (East Metro). Below these fields is a table with columns 'Team' and 'Description'.

Team	Description
1054	#1 Team
19	_test_
51	AJ & Sarah
52	AJ Kelly and Jaime
37	Cindy Smith
30	Claudine
1	Default
43	East Metro


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.

Related Articles
