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Create Sales Teams

Wendy D - 2019-06-07 - in ESP Admin

The Teams section enables administrators to create group sales representatives within your company into teams. By creating teams, administrators can assign multiple users within their company access to specific companies, contacts, notes, orders, and appointments.

Click on the Avatar (user icon) in the upper right corner and then select Settings. Then, click on Teams from the options on the left.

All existing sales teams will be available. Click on the Edit link to update the users within a team or change the name. Click on the Delete link to delete the sales team.

Team Name	Actions
Ambers Team (3)	Edit Delete
Kim's Team (5)	Edit Delete

To create a sales team, click on the Add button.

The image shows the 'Teams' section header with a group icon and the text 'Teams'. To the right is a green '+ Add' button with a blue arrow pointing to it. Below the header is a search box with the placeholder text 'Search' and a magnifying glass icon.

Enter a name for this team in the Team Name box. Then, use the dropdown to view the available users within your company. Click on the representative's name to add them to this sales team. You can also begin typing a representative's name in the Add New Member box and matching results will display in the dropdown. If you need to remove a representative, hover on their name and click on the trash can icon to remove them.

After you have finished adding representatives, click on the Save button.


Add Team ×

Team Name *

Add New Member

Members

- Daniel Smith
- Jane Doe
- Robert Jones



The team will now be available for use in CRM and Orders.