

Team Management

1. **The Team concept is extremely important, as each Account, Contact, Lead, Opportunity, Quote or Case in your Org is assigned to a Team (and only to one Team), and may only be accessed by a member of the Team to which it is assigned.**

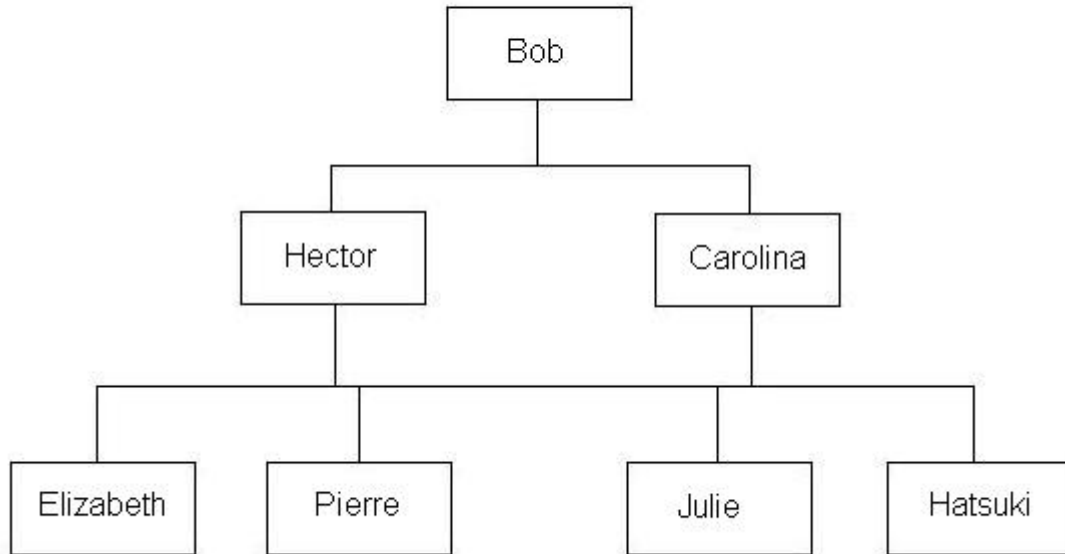
You should give a lot of thought to the definition of your Teams within an organization as failure to define these correctly may mean that you have problems viewing / accessing / updating Accounts, Contacts, Leads, Opportunities, Quotes and Cases.

All your data (Accounts, Contacts, Leads, Opportunities, Quotes and Cases) will reference these Teams, and it is much easier to define a workable system at implementation time, than it is to edit all of those records at a later date.

2. Each user may belong to one or more Teams.
3. Users are set up with a default “Private” Team during the Org setup, with their username being the Private Team name.
4. Users are also by default added during initial setup to a Team called “Global”. This means that any Accounts / Contacts etc that are added and assigned to the Global Team will be available to all users.
5. Each User can have a Manager and Direct Reports as defined in the User Management screen. **Managers can view any record that their Direct Reports can view, regardless of their Team membership.**
6. Teams are managed using the Team Management screen, accessible from the System Administration home page.
7. Note that a user may be a member of more than one Team, and that you may create as many Teams as you like.
8. Users can only access Accounts and Opportunities in the Mobile edition that are actually assigned to their Private Team (not just to a Team that they can see)
9. Every manager (or person with others either reporting to them in the hierarchy or whose data they need to see) needs a Team set up for themselves.
10. In Team Management a Team needs to select the name of the Team Manager, anybody who is below them in the hierarchy whose data needs to be visible and the name of the person above the manager in the hierarchy.

To aid your understanding of the above please see the setup example in the following pages.

Company Hierarchy



1. Team Management Setup (Admin → Team Management)

Private Teams

Bob
Hector
Carolina
Elizabeth
Pierre
Julie
Hatsuki

Other Teams

Bob's Team
Hector's Team
Carolina's Team
Global Team

Bob's Team

Bob
Hector
Carolina

Hector's Team

Hector
Bob
Elizabeth
Pierre

Carolina's Team

Carolina
Bob
Julie
Hatsuki

Global Team

Bob
Hector
Carolina
Elizabeth
Pierre
Julie
Hatsuki

Continued

2. User Hierarchy Management (Admin → User Management)

Users

Teams

Role

Bob	Bob's Team Hector's Team Carolina's Team Global Team Bob (Private)	Team Edition User
Hector	Bob's Team Hector's Team Global Team Hector (Private)	Team Edition User
Carolina	Bob's Team Carolina's Team Global Team Carolina (Private)	Team Edition User
Elizabeth	Hector's Team Global Team Elizabeth's (Private)	Team Edition User
Pierre	Hector's Team Global Team Pierre's (Private)	Team Edition User
Julie	Carolina's Team Global Team Julie's (Private)	Team Edition User
Hatsuki	Carolina's Team Global Team Hatsuki's (Private)	Team Edition User

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3. Role Management (Admin → Role Management)

Every Collaborative Edition Org has a Role set up called "Collaborative Edition User". You must edit this Role and at the bottom select to add all your

company's users (if they ever wish to share any global contacts/accounts/opportunities etc.)

Inside this role is where you define the authorities for users who are assigned this role (see Fig.1. below).

Fig.1

	Access	User Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Normal	All	All	All	All	All	All
Bug Tracker	Disabled	Normal	All	All	All	All	All	All
Calls	Enabled	Normal	All	All	All	All	All	All
Campaigns	Disabled	Normal	All	All	All	All	All	All
Cases	Disabled	Normal	All	All	All	All	All	All
Contacts	Enabled	Normal	All	All	All	All	All	All
Contracts	Disabled	Normal	All	All	All	All	All	All
Documents	Disabled	Normal	All	All	All	All	All	All
Email Marketing	Disabled	Normal	All	All	All	All	All	All
Emails	Disabled	Normal	All	All	All	All	All	All
Email Templates	Disabled	Normal	All	All	All	All	All	All
Forecasts	Disabled	Normal	All	All	All	All	All	All
Leads	Enabled	Normal	All	All	All	All	All	All
Meetings	Enabled	Normal	All	All	All	All	All	All
Notes	Enabled	Normal	All	All	All	All	All	All
Opportunities	Enabled	Normal	All	All	All	All	All	All
Products	Disabled	Normal	All	All	All	All	All	All
Projects	Disabled	Normal	All	All	All	All	All	All
Project Tasks	Disabled	Normal	All	All	All	All	All	All
Target Lists	Disabled	Normal	All	All	All	All	All	All
Targets	Disabled	Normal	All	All	All	All	All	All
Quotes	Disabled	Normal	All	All	All	All	All	All
Tasks	Enabled	Normal	All	All	All	All	All	All