

Adding a User to a Department in SalesAutomation

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Follow these steps to add a User to a Sales Department in Sales Automation

1) Log into Sales Automation, Click on Setup and then Users, click the Add User button and create the User and save.

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2) Click on Setup then employees, click the New Employee button and then link the User you just created to the employee and then save.

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3) Click the pencil icon to the right of the employee.

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4) Underneath Departments click the Add button and add the desired Sales Department and then click the checkmark on your right to save

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5) To save/edit a proposal your USER must be part of a Sales Department. Peter can now save/edit a proposal.

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