

How to Group Users Together Under a Department Manager in Sales Automation

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There may be a time when grouping users/employees together under one manager for Sales Automation. This document goes over the steps needed to complete that task.

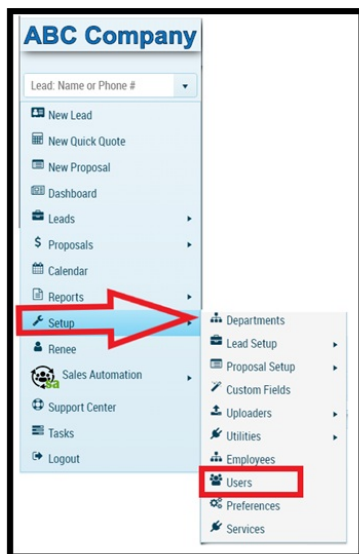
Overview

Follow the steps in the exact order shown below to add users grouped under a department manager. The steps below will need a user with add permissions to be logged into Sales Automation to complete these steps.

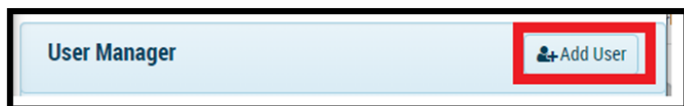
Steps:

1. Add User:

a. Click on Setup – Users



b. When the User Manager Window opens – Click on Add User

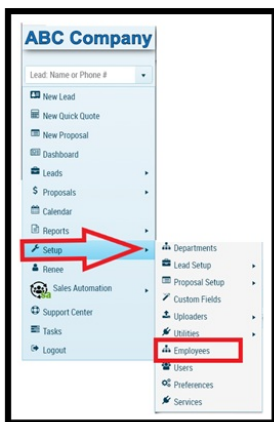


c. Fill in all information about the user including all products that user will have access to and the permissions that user will have while using those products – once completed Click Save

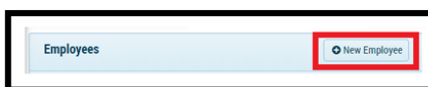
Example of a Supervisor User and Sales Person User

2. Add Employee

a. Click on Setup – Employees



b. Once the New Employee Window Opens – Click on New Employee Button

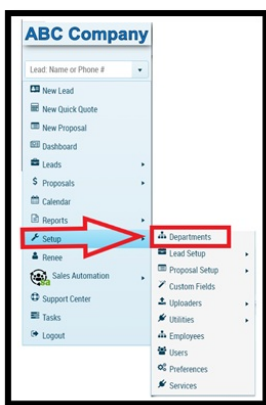


c. Fill in all the data needed for that employee, using the User Name that was just entered above – Click Save button

once completed

3. Add Department

a. Click on Setup – Departments



b. When the Department window opens – Either Click on New Department button to add a new department or select from one of the departments available in the list.

Name	# of Managers	# of Sales Team Members
Commercial Sales	2	2
Industrial Sales in the West	2	7
Mobile Division	1	1
Residential Sales	3	7
Service to sales department	1	1
Service	1	3
Temp test	0	1

1) Add New Department

a. Click on button to Add New Department Button

b. In the New Department Window – Add the Department Name and Description (this is where the Department can be named the Manger or an area)

c. Click and highlight the Available SA Employee(s) that are to be in the department - then click on the button to move to left

d. Click on the Managers tab and add the appropriate managers

e. Click on the Approvers tab and add the appropriate approvers by clicking on New – Then select the employee(s) from the list – Click on Update once complete

f. Click on Save Department

g. The New Department will now show in the list

Name	# of Managers	# of Sales Team Members
Commercial Sales	2	2
East Coast Sales	1	4
Fastest Sales in the West	2	7
Nicole Dinglow	1	1
Residential Sales	3	7
Secure U sales department	1	1
Service	1	3
Temp test	0	1

2) Use Existing Department

a. Click on the Existing Department

- b. Add the appropriate Sales Team, Managers, Approvers by using the same steps above
- c. Save Department once completed

Grouping users under the department manager is completed