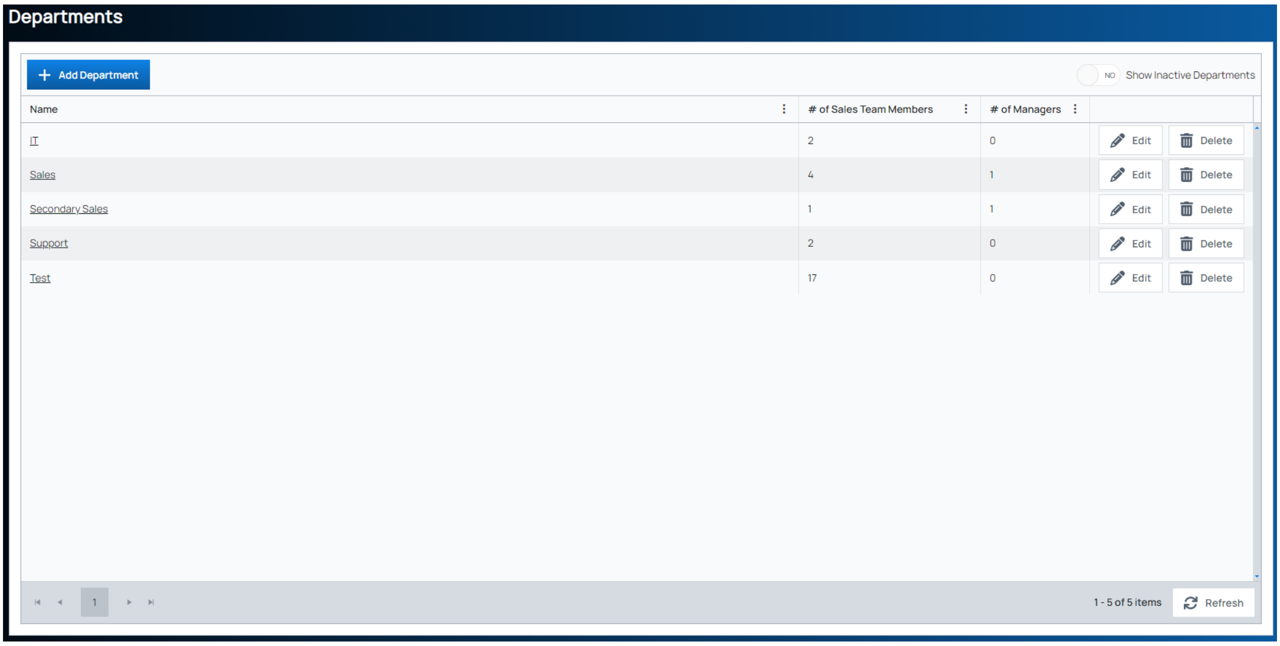
Departments

Last Modified on 11/01/2024 4:15 pm EDT

Use this page to create, edit, and delete departments, and add and remove salespeople, managers, and approvers to the departments.

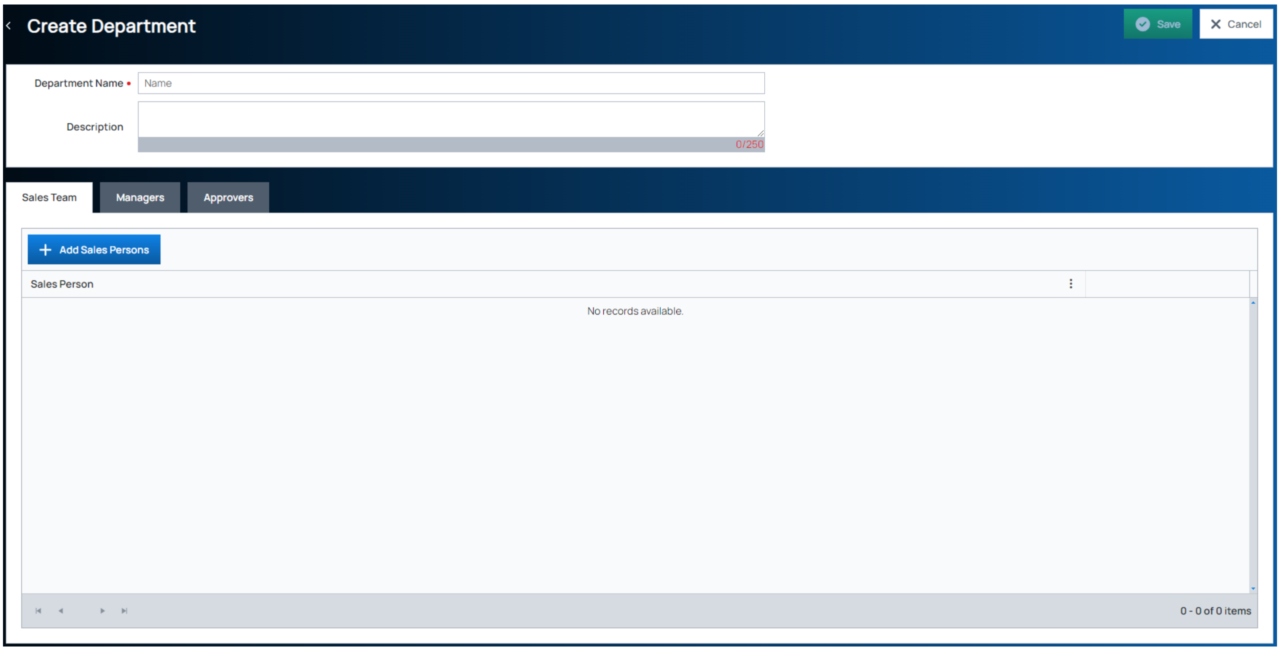


In the grid, columns show the department name, number of salespeople in the department, and the number of managers. There is an Edit button and Delete button in each row to change or delete the department.

Note: Deleting a department that has salespeople makes it inactive (it can be reactivated later). Deleting a department that has no salespeople deletes the department.

How to Add a Department

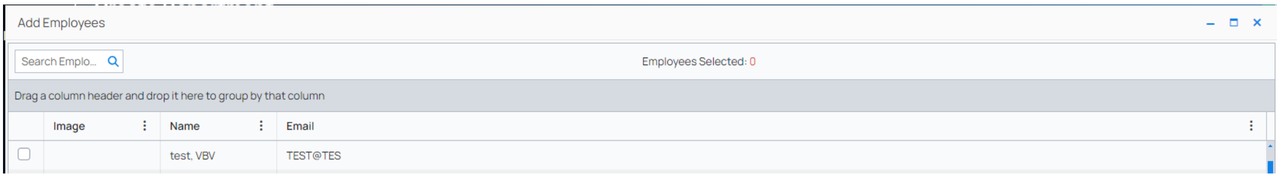
Click the **Add Department** button.



Type a **Department Name.** (Required)

Type a **Description** for the department.

On the Sales Team tab, click the **Add Sales Persons** button. This opens a popup showing all employees who are linked to users.

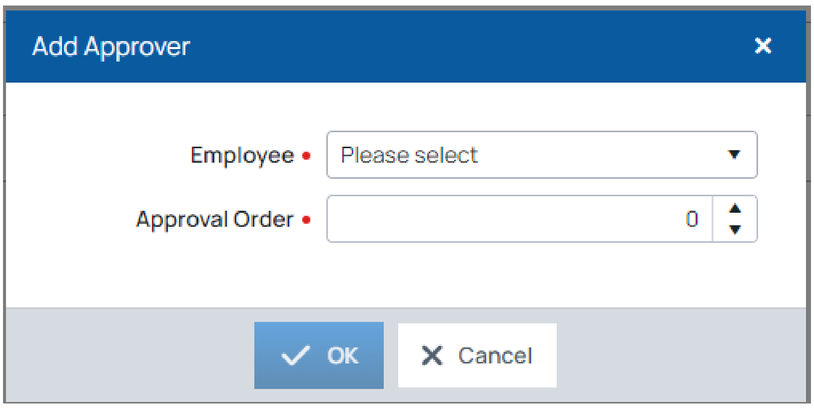


Select the checkbox at the left of each row for each employee. When finished, click the **Add Employees** button at the bottom.

On the Managers tab, click the **Add Managers** button. This opens a popup shows employees who can be selected as a manager. These are employees who are linked to an Admin user.

Select the checkbox at the left of each row, for each employee. When finished, click the **Add Employees** button at the bottom.

On the Approvers tab, click the **Add Approver** button. This opens a popup to select proposal approvers:



Select an **Employee** to be a proposal approver. (Required) This is an employee who is a salesperson that is linked to a user.

Select an **Approval Order** for the employee. (1 for first approver, 2 for second approver, etc.) (Required)

Click **OK** when finished.

Choose as many approvers as needed.

When finished with the Sales Team tab, the Managers tab, and the Approvers tab, save the department (click the **Save** button near the top right corner of the page).