Viewing Team Members by Office

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This guide explains how to view and assign team members to an office. It is intended for general users.

The Offices module can display the team members assigned to various office records and help you add new team member records to the system. (Note: Office assignments are typically managed at the Team Members module. Read more about <u>users and team</u>

members (http://aace6.knowledgeowl.com/help/team-members-system-users).)

View Team Members Assigned to an Office

- 1. Navigate from Main Menu > Internal > Offices.
- 2. Use the Quick Search bar to locate and select the desired office record.
- 3. Click the Team Members tab.

•				Of	fices					
Record: 1 of 1							New 💠 Ec	lit 🖋 Delete 🗶 Pi	rint 🖶 Actions 🛪	
Office: aAC	CME Educ	ation Solu	tions, Inc.	(AI)			Notices 🔒	Tasks 🗹 🛛 Emi		
Seneral Info							Company			
Tax ID Er	ntity #					Company >				
5555555 1							aACME Education Solu	utions, Inc.		
Office Info ♀			Payment Addr	ess ♀	Us	e Office Info 🗙	Contact Info			
Address Title (Company Name)			Payment Title (Company Name)				Phone	Alt Phone		
aACME Education Solutions, Inc.			aACME Education Solutions, Inc.				(555) 418-9777			
Address			Address				Fax	Phone / Fax Format		
1238 Broadway			1238 Broadway				(555) 418-9778	(###) ###	-####	
							Email			
							info@aacme.com			
City	State / Prov	Postal Code	City	4	State / Prov	Postal Code	Web Address			
New York	NY	11221	New York	,	NY	11221	www.aacme.com		2	
Country	Postal Format	Postal Format		Country Postal I			Email Format (using "John Q Public") 🕜			
United States	American		United States America		American		john.public@aacme.com			
Departments	Team Membe	ers (45) Ihven	tory Bins (27) R	teporting						
Name Name		Department Company			Phone	Direct	Mobile	Status		
> John Smith		AI-FFMT John Smith		(555) 418-9777		x586 (555) 288-0061	(555) 531-2661			
> Kathy Jacobs			AI			(555) 418-9777			0 🖬	
> Katie Connolly			AI-Shipping Katie Connolly		(555) 418-9777	x484 (555) 286-9318	(555) 123-9326	🔴 🔛		
> Kristie Hernandez			AI-FFMT Kristie He		andez (555) 418-9777		x153 (555) 552-1596	(555) 579-8563	🔴 🔤	

Add a Team Member from an Office Record

- 1. Navigate from Main Menu > Internal > Offices.
- 2. Locate the office record that the new team member will linked to.
- 3. At the Team Members tab, click the New (💽) icon.

Departments (8)	Team Members (45)	Inventory Bins (27)	Reporting			
🕒 Name		Department	Company	Phone Direct	Mobile	Status
> John Smith		AI-FFMT	John Smith	(555) 418-9777 x586 (555) 288-006	(555) 531-2661	I I I I I I I I I I I I I I I I I I I
> Kathy Jacobs		AI		(555) 418-9777		🌒 🎽
> Katie Connolly		AI-Shipping	Katie Connolly	(555) 418-9777 x484 (555) 286-9318	(555) 123-9326	🕘 🔛
> Kristie Hernandez		AI-FFMT	Kristie Hernandez	(555) 418-9777 x153 (555) 552-159	(555) 579-8563	🌒 🎽

At the Team Member module, enter the new team member's information, then click 4. **Save**.