

To Make Teams Visible in CRM

If you do not see Teams in any of the CRM modules. Refer to below image.

Save Cancel * Indicates required field

Account Information

Account Name:* Holly's world of plants Phone: 865-935-8861

Website: Fax:

Ticker Symbol: Other Phone:

Member of: Change Email:

Employees: 5 Other Email:

Ownership: Rating:

Industry: Other SIC Code:

Type: Customer Annual Revenue:

Assigned to: Change Customer Status: Paid in Full

Team: Training Change

You need to perform the below steps in order to activate the team functionality:

1. Log into the CRM as an Administrator.
2. Click Admin at top of CRM screen.
3. Click Team Management within Users.
4. Enter team in the Search Window.
5. Click Search.

Configuration: Home Print Help Wiki

Configuration Search

Name: team Enter team Search Clear

6. A configuration window displays listing two options.
7. Double click the first option: **enable_team_management**
8. Using the mouse, highlight the word **false** in the Value window.
9. Replace it with True.
10. Click Save.

Configuration: enable_team_management Help Wiki

Save Cancel * Indicates required field

Name:* enable_team_management Category: system

Value: false