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

Last Modified on 07/11/2024 12:09 pm EDT

Users may need to be grouped under a specific manager in Sales Automation.  The steps below show how this can be accomplished.  These steps were completed using SedonaOffice 6.2.0.14.

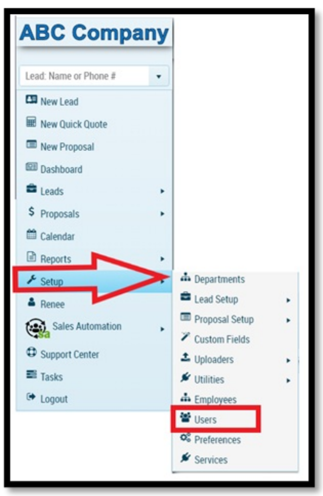
OVERVIEW

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

Steps:

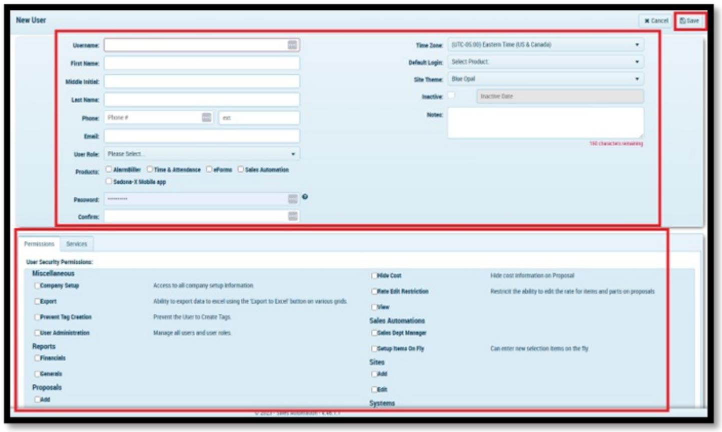
1. **Add User:**

a. Click on Setup – Users

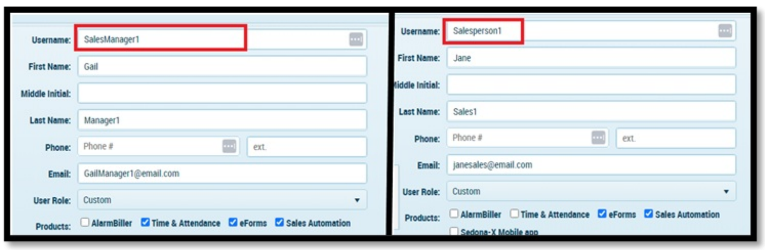



b. When the User Manager Window opens – Click on Add User


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

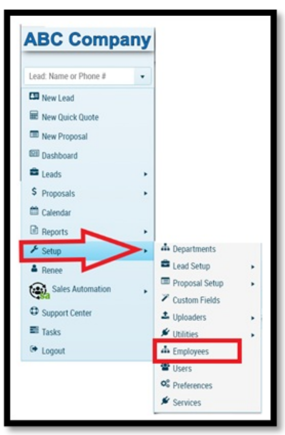



*Example of a Supervisor User and Sales Person User*

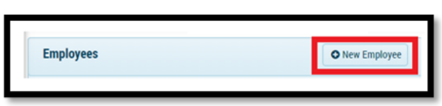



## 2. Add Employee

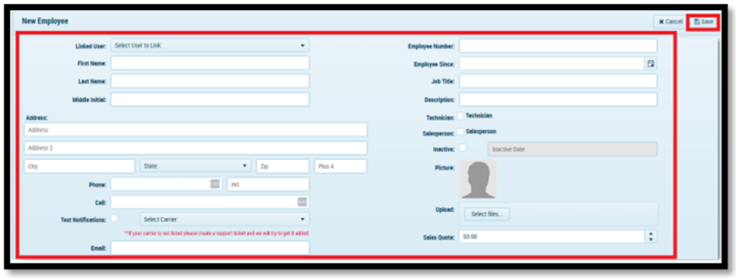
a. Click on Setup – Employees




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

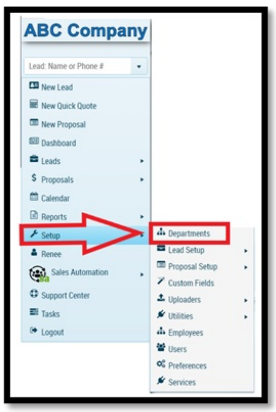



c. Fill in all the data needed for that employee, using the User Name that was just entered above – Click Save button once completed

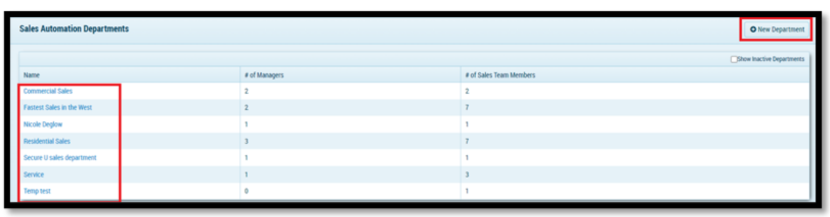



### 3. Add Department

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.

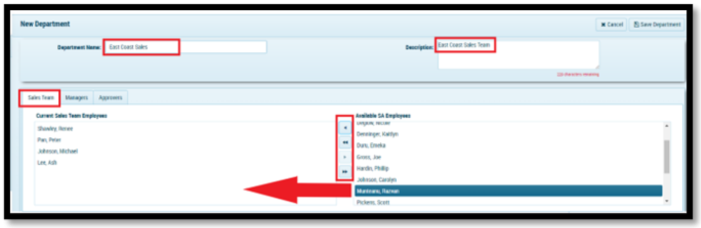



### 4. Add New Department

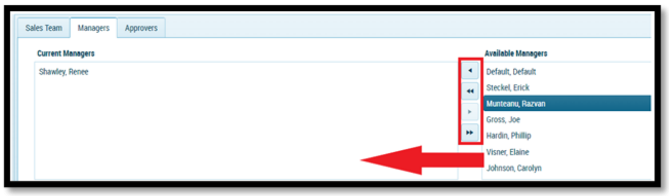
a. Click on button to Add New Department Button

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)

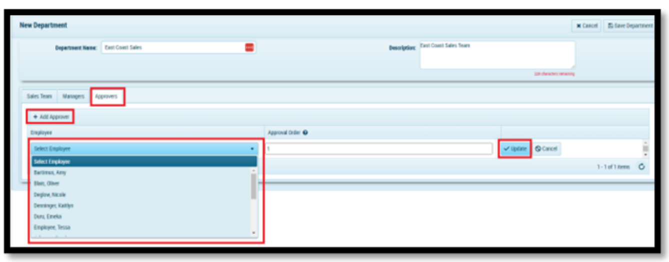
c. Click and highlight the Available SA Employee(s) that are to be in the department - then click on the button to move to left



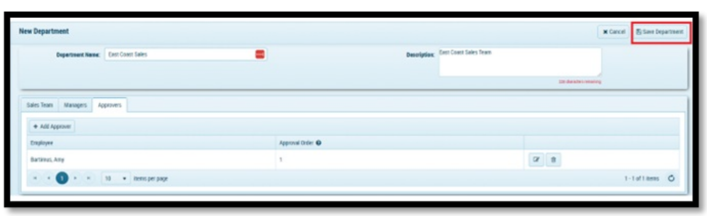

d. Click on the Managers tab and add the appropriate managers




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


## 5. 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

6. Grouping users under the department manager is completed and their information can now be seen by that manager