Team Members

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Team Members

The Selling Team consists of individuals within your own organization that have a specific role within the account.

To add a Team Member:

1. In the Platinum Sheet, click the Add icon in the **Selling Team** section header to open the section.
2. Click the Search icon in the **Name** field and do one of the following:
   - If the desired name appears in the drop down list, select the name and proceed to step 6.
   - If the desired name does not appear in the drop down list, select the Search tab and proceed to step 4.

4. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Go**.
5. From the list of items that match the search criteria, select the desired team member to populate the name field.
6. Click the radio button next to the desired role.
7. Click **Done**.

To delete a Selling Organization team member:

1. Click the desired team member name and click the Trash can icon. A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No/Cancel** to cancel.