Sales Teams

JOBZ! enables collaboration among coworkers by sharing access to data, according to rules.

As a rule, sales reps can only view and edit their own records. That is, contacts, jobs and other records such as memos, with their own name in the Sales Rep field. When you create a new record, your name is placed into the Sales Rep field automatically. Sales reps cannot change this field once a record has been created.

One exception to this scheme is what is known as the Team Rep. A Team Rep is another sales rep appointed to a job or contact by the Sales Rep, thus giving the Team Rep the ability to view and edit that particular contact or that particular job. The Team Rep field is located below the sales rep's name on the first SPEX screen in the JOBS database and on the Input screen Ownership tab in the ADDRESS database. When a user runs an organizational sort such as "In Estimating," it will return records in which they are either the Sales Rep or the Team Rep. However, the Home screen Status portals will only show jobs on which the Sales Rep is the logged-in user.

The Organize > SORT is another way to find jobs on which you are a team member, by selecting the Job Team tab and selecting a Status category. Performing a Find will return jobs and contacts on which you are a Team Rep.

You can set a default Team Rep in YOU, so that as you create new jobs and contacts, they will be automatically entered. However, existing jobs and contacts will not be retroactively assigned. You can be a Team Rep on jobs or contacts for multiple different Sales Reps, but there is only one Team Rep per job or contact.

If you go on vacation or otherwise want to share all your data with another Sales Rep, they can simply log in as you, if they know your login and password. However, once they do this, they can only function as you, until they re-login as themselves. The Team Rep feature means they can log in as themselves, and still collaborate with you.

When you are the Team Rep on a contact, you can create a new job from the New Job button on the ADDRESS Input screen JOBS tab, and the job will have your name as the Team Rep, the sales rep's name as the Sales Rep, and the contact's name as the sales contact on the job.

If you are a Team Rep on a job, but not also a Team Rep on the job's sales contact, you will still have access to the job, but some functions will be unavailable.

For CSR's:

If you are the CSR on a contact, you can create a New Job from the ADDRESS Input screen JOBS tab, and the job will have your name as the CSR, the Sales Rep's name as the Sales Rep, the Team Rep's name as the Team Rep, and of course, the contact's name as the sales contact on the job.

A CSR can also create a new job and then decide which sales rep (from the entire company) should be the Sales Rep on the job. However, in order for the CSR to select a sales contact and invoice contact for the job, their name must be in the CSR field of the contact's ADDRESS record.

For Managers:

Managers have access to all records in the database, though reports and portals will generally filter out data for Sales Regions other than your own.

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