Teams

September 10, 2026

Teams

Teams at a glance

Teams is the security-administration area for viewing the team list and opening the new
and existing team record routes. The list is titled **All Teams**.

If you need to…	Go to
See the available teams and their list columns	Find and open a team
Start a new team record	Start a team record or merge teams
Review fields and member information	Understand the team screen
Add or manage members on an existing team	Maintain members and team status
Check related user administration	Users overview
Check related role administration	Roles
Review booking-target setup	Booking target

Before you start

Prerequisites

- Sign in with access to the Teams routes.
- Open **Teams** from the security administration menu to open the list.
- Select **New** from the list to start a team without an existing record.
- Have a saved team record before using record-only actions such as **Last Modifications**,
  Activate team, or **Deactivate team**.
- Have edit access before using the record-edit, member, or status controls.

The **New** and **Merge teams** controls appear when your access allows new-team actions.
The record's edit actions appear when editing is allowed. **Last Modifications** and the status actions require an existing team record. The standalone record screen shows its
breadcrumbs and action bar; the embedded member dialog uses a different display mode.

Find and open a team

The Teams list is where you identify a team row and choose whether to start a new record or
open an existing one. The list currently displays the headers **Team**, **Leader**, **Memebers**, **Department**, **Target**, and **Active**.

Prerequisites

- Have access to **Teams** in the security administration menu.

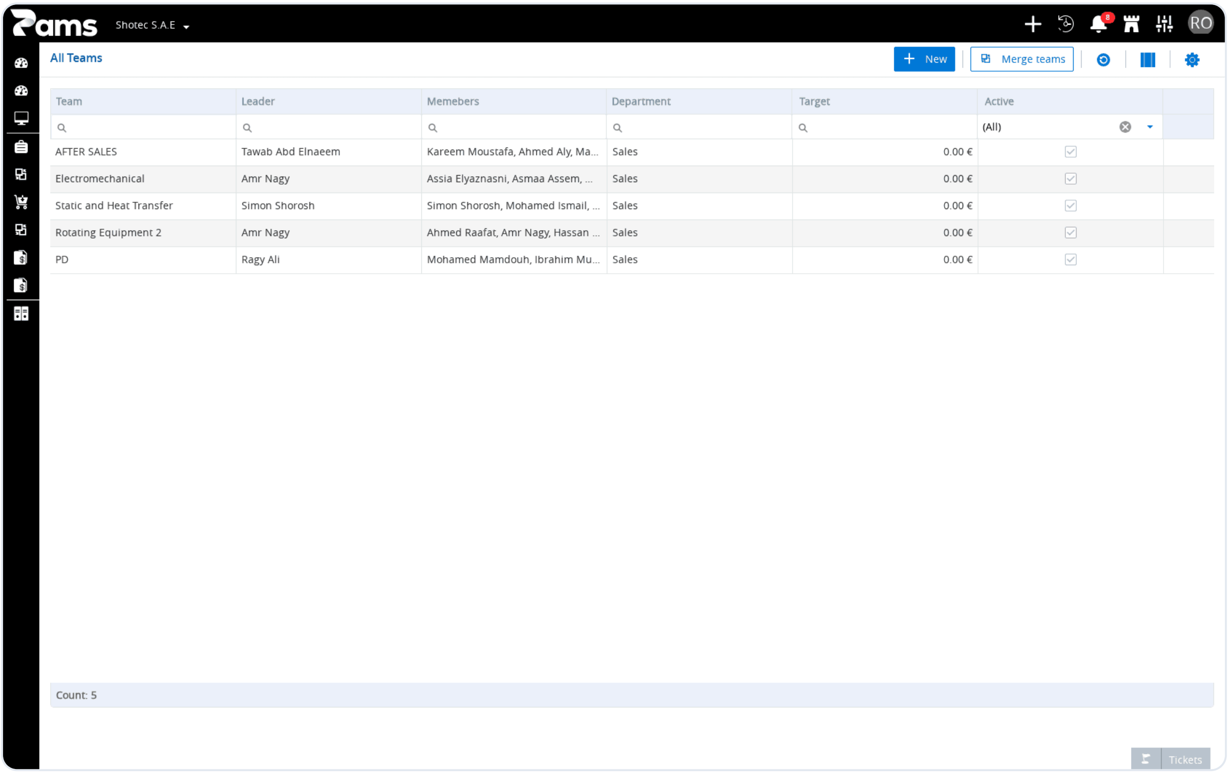
Steps

1. Open **Teams** from the security administration menu.
2. Choose the route that matches your task.

If you need to…	Do this
Start a team record	Select **New**.

| Open an existing team | Select the row's edit control. |

Result: The Teams list is on screen, or the selected new or existing team route is open.

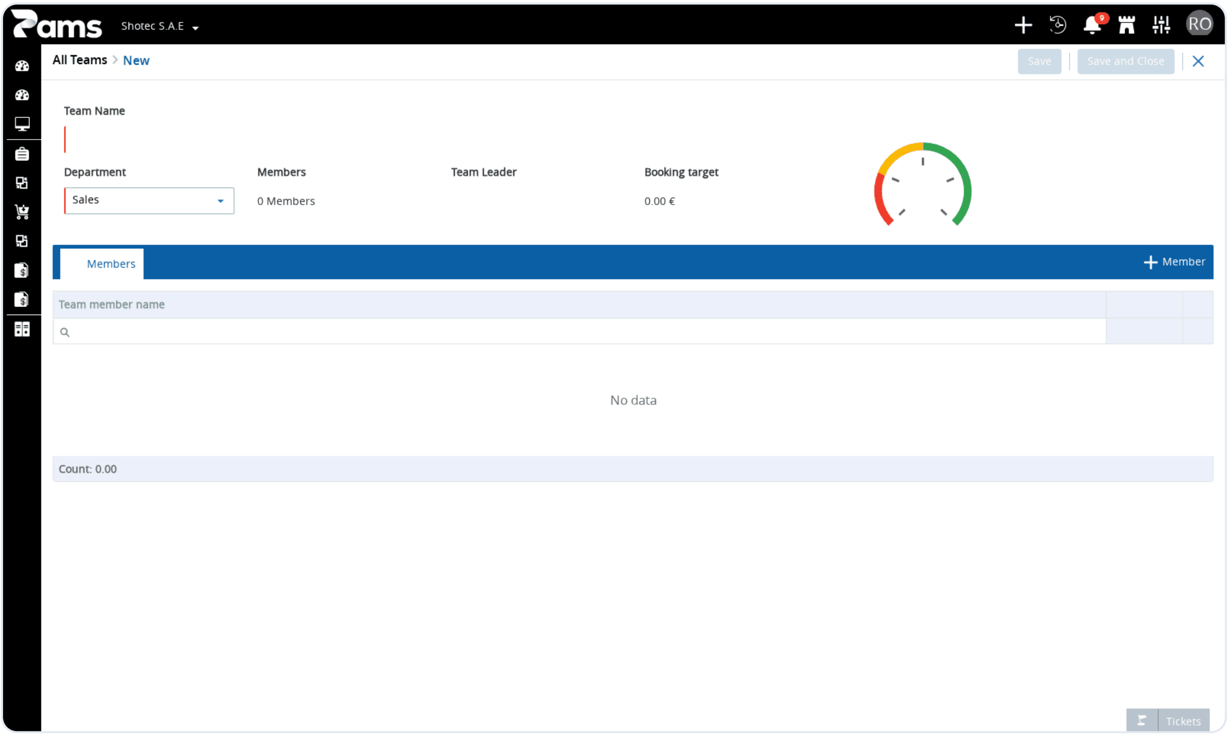


Understand the team screen

A team record identifies the team, its department, its members, and its leader. The screen
also provides a members area and, for an existing record, a **Last Modifications** area.

Area	What you see	When it appears
Team details	**Team Name** and **Department**	On the team record screen
Team summary	**Members**, **Team Leader**, and **Booking target**	The summary readouts appear on the record; **Booking target** is tied to the sales-team condition.
Members tab	**Member**, the **Team member name** column, **Make as leader**, and **Remove from team**	On the **Members** tab
Audit tab	**Last Modifications**	When the team has an existing record
Record actions	**Save** and **Save and Close**	When the record is editable
List tools	**Refresh**, **Table Layout**, and **Settings**	On the Teams list

The member grid has a **Team member name** column and a second column with no caption for
member status. Use **Make as leader** or **Remove from team** when those controls appear.
The headers in the Teams list come from the saved list layout, so work from the headers
visible in your own list.



Start a team record or merge teams

Use **New** to open a blank team record. Use **Merge teams** to open the merge dialog from
the Teams list.

Start a new team record

Prerequisites

- Be on the Teams list.
- Have access to the new-team action.

Steps

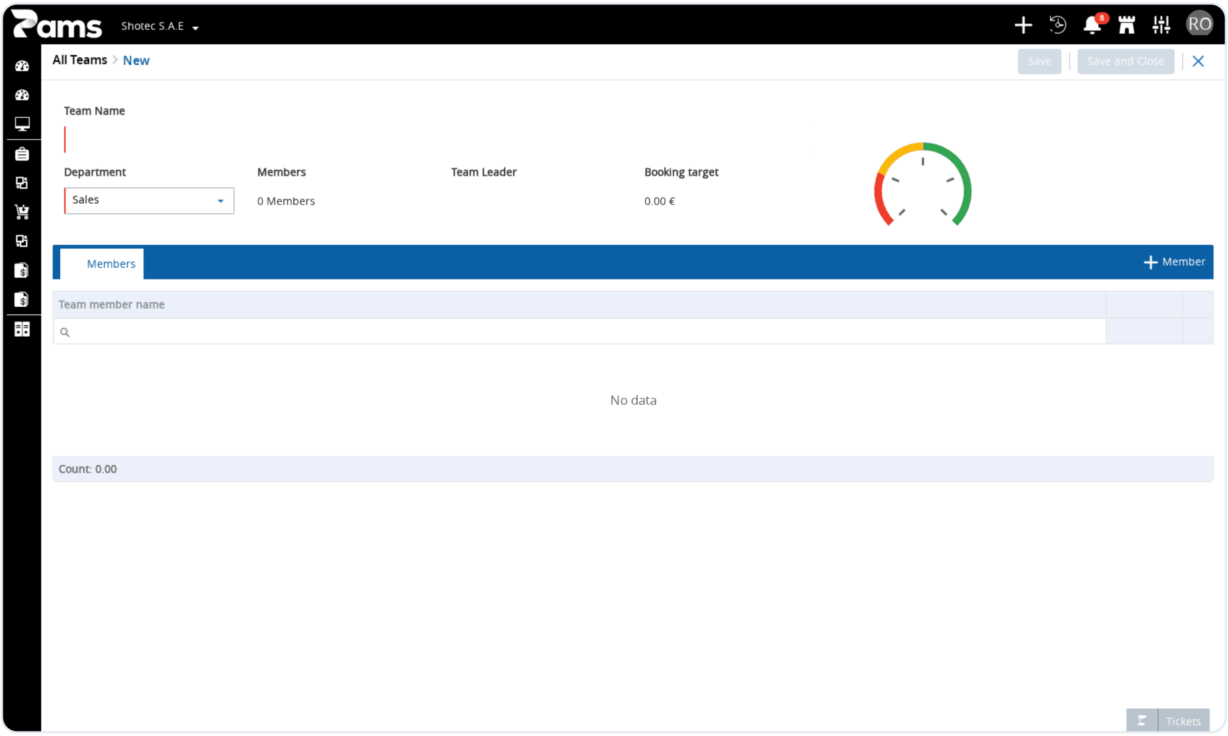
1. Select **New**.

Result: The new-team screen opens with **Team Name** and **Department** marked as
required. It also shows the team summary, member area, and save controls.

2. Enter a value in **Team Name**.
3. Select a value in **Department**.
4. Choose the save action that matches your next task.

If you need to…	Select
Keep the team record open	**Save**
Save the team and leave the record	**Save and Close**

Result: The new team record remains open after **Save**, or it closes after **Save and Close**.



Open the merge dialog

Prerequisites

- Be on the Teams list.
- Have access to the merge action.

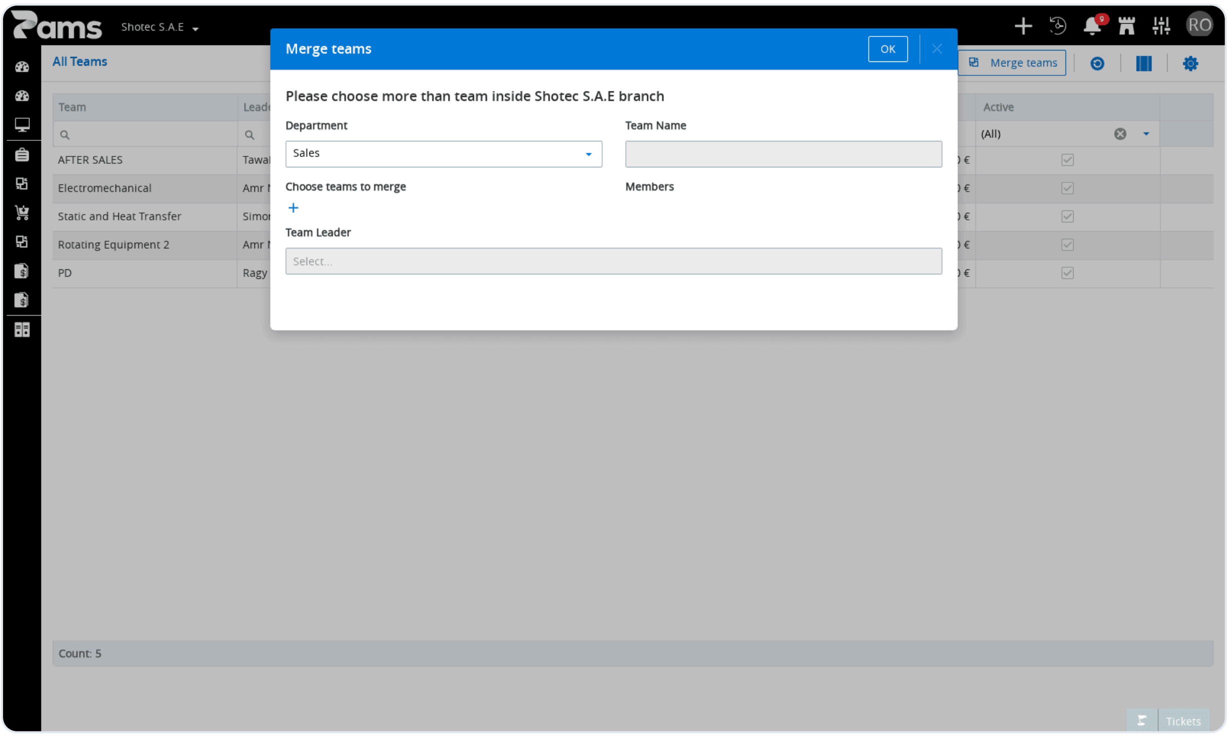
Steps

1. Select **Merge teams**.

   Result: The merge dialog opens with **Department**, **Team Name**, **Choose teams to**
   merge, **Members**, and **Team Leader**. The dialog provides an **OK** button.

2. Select a value in **Department**.
3. Enter the resulting name in **Team Name**.
4. Select more than one team in **Choose teams to merge**.
5. Review **Members**.
6. Select the resulting leader in **Team Leader**.
7. Select **OK**.

Result: The merge dialog accepts the selected teams and the fields needed for the merge
decision.



The merge dialog displays `Please choose more than team inside branch name branch`. The **Team Name** field also uses the required-field and pattern checks listed in General error messages: `This Field Is Required` and `Just '_''-''.' And '&' Characters Accepted`.

Maintain members and team status

An existing editable team is the place to maintain membership, identify its leader, change
its active state, and review its modification history.

If you need to…	Use	Condition shown by the screen
Add a member	**Member**	The **Members** tab is active and the team is in standalone edit mode.
Set a member as leader	**Make as leader**	The control is available on an editable team.
Remove a member	**Remove from team**	The control is available on an editable team.
Activate a team	**Activate team**	The saved team is inactive and editable.
Deactivate a team	**Deactivate team**	The saved team is active and editable.
Review changes	**Last Modifications**	The team has an existing record.

Add or edit a member

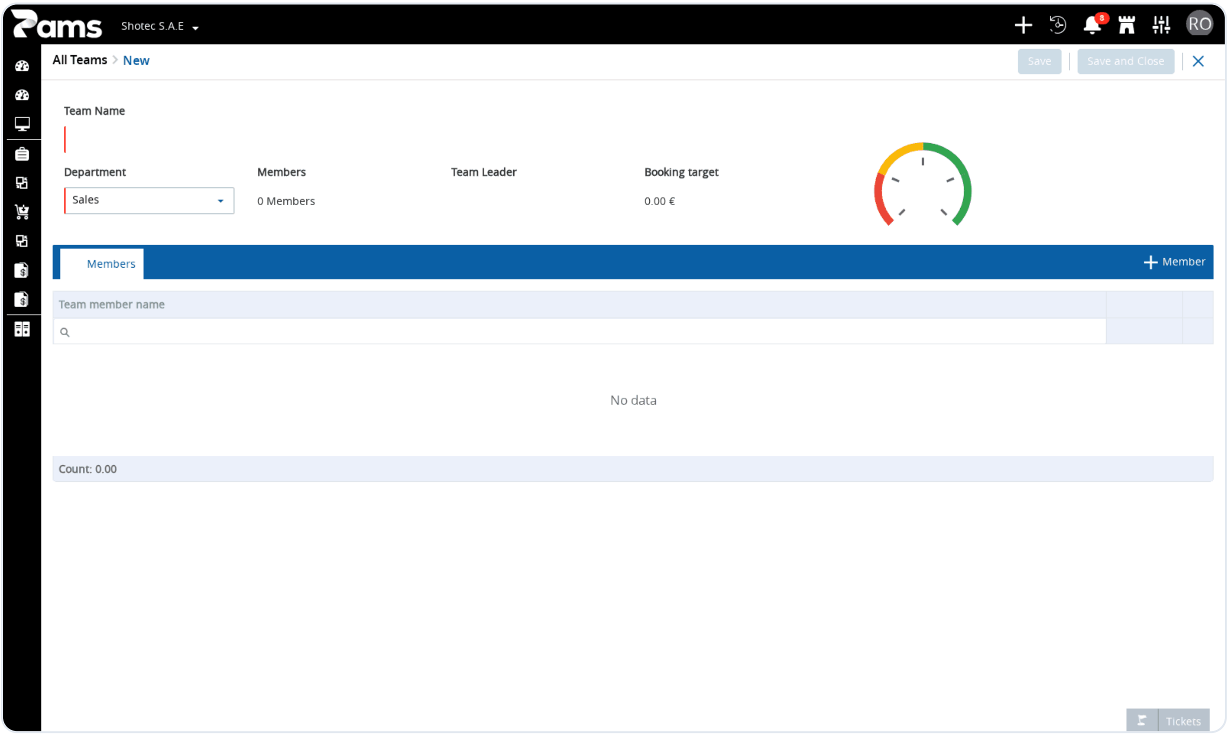
Prerequisites

- Open an existing editable team.
- Open the **Members** tab.

Steps

1. Select **Member**.
2. In the member dialog, choose a person in **Team Members**.
3. Set **Team leadership** when the member is the team leader.
4. Complete the required **Team Members** field.

Result: The member dialog contains the selected person and the optional leadership choice.



Change a member or the team status

Prerequisites

- Open an existing editable team.
- Open the **Members** tab.

Steps

1. Open the member-row menu for the member you want to change.
2. Select **Make as leader** or **Remove from team**.
3. Select the action that matches your task.

If you need to…	Select
Activate an inactive team	**Activate team**
Deactivate an active team	**Deactivate team**
Review the record history	**Last Modifications**

Result: The available member, status, or audit branch is open for the existing team.

The confirmation messages for these actions are:

Action	Message
Make as leader	`Are you sure you want to make {{tempMember.PersonName}} a team leader?`
Activate team	`Are you sure you want to activate {{TeamDetails.TeamName}}`
Deactivate team	`Are you sure you want to deactivate {{TeamDetails.TeamName}}`
Remove from team	`Are you sure you want to exclude {{tempMember.PersonName}} from the team?`

When a field or route is unavailable

Use the message on screen to identify whether a required value, a permitted character, or
a request-processing problem stopped the current action.

What you see	What it means	What to do
`This Field Is Required`	A required field is empty.	Return to the named field and enter a value.
`Just '_'‘-''.' And '&' Characters Accepted`	**Team Name** contains a character outside the allowed pattern.	Correct **Team Name** and repeat the action.
`An error occurred while processing your request`	The request was not processed.	Review the current values before repeating the action.

The list's visible columns depend on the saved list layout. Read **Members**, **Team Leader**,
and **Booking target** from the summary when those readouts appear on the team record.

What to do next

After reviewing a team, continue with the related security records that supply its people
and access setup. Use Users overview for user administration and
Roles for role administration. If the team uses a booking target, continue
with Booking target.