Creating a New Team

This topic describes when you'll need to create new teams and how to create them using the Teams wizard. It also provides some tips to keep in mind when creating teams.

When are New Teams Needed?

There are several default teams that match the default groups, such as the Support team, Sales team, Customer team, and Internal Customer team. These default teams are often adequate for a new implementation, but you can create new teams or copy existing teams when more refined distinctions in permissions are necessary. For example:

- Create new Power User teams for each set of users you need to assign records to, or email as a group.
- Create new End User teams if you want to support multiple brands, such as different Look and Feel schemes or default views.

Create Teams with the Teams Wizard

New teams are created with the Teams wizard. Depending on your needs, you might copy an existing team and make any necessary edits in the Teams wizard, or create a new team from scratch.

1. Click the **Setup** gear in the top-right corner and go to **Access > Manage Teams**, or open the Teams table from the navigation menu.
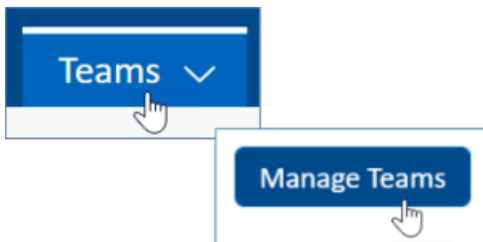
Accessing Teams table

2. Either edit an existing team or click New on the action bar.
3. Enter a Team Name, Team Description, and choose the team's refresh rates. You can also define a Parent Team, if you want to organize your teams in a hierarchy.

> **✓ Best Practice Tips**
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> - Use a word in the Team Description field that you can use in a search filter on any Assigned Team fields. This lets you filter those fields to include only the teams you want to appear.
> - Always include the word "Team" in the team name. This makes it obvious that you are dealing with a team if you see the value in the field.
> - When using parent teams, always choose a team that will have similar access to views as the subteam. This allows the subteam to inherit the available views from the parent team.

4. On the Events tab, schedule any events or meetings for the team, if desired. This tab is often skipped.
5. On the Working Hours tab, define the team's working hours. You can choose the "Same hours as [Team]" option to copy another team's working hours. If you're using working hours, set them up for the Company team first, and then copy that team's hours whenever possible.

Working Hours setting

6. Click the Languages tab and choose the languages available to the team. For more information, see Applying Languages to Teams.
7. Use the Formats tab to define the time and date formats for the team.
8. Click the Custom Fields tab and define whether the team is active, whether the team can receive emails, and which tables the team will appear in the Assigned Team drop-down. You can also add team members to the team on this tab.