

Testing of Teams in CRM 1.3 – FastBlue

1. Created Users in FastBlue CRM

- **Agent Test1** (username: test1 - password: test1)
- **Agent Test2** (username: test2 - password: test2)
- **Agent Test Supv** (username: supv - password: supv)

Test1, Test2, Supv as new users.

Users Entire List Excel XML Spreadsheet Export

Previous (1 - 11 of 11) Next

Name	User Name	Department	Email	Primary Phone	Status	Admin
Administrator	admin		hsomers@promero.com		Active	<input checked="" type="checkbox"/>
Agent Test2	test2				Active	
Agent Test Supv	Supv				Active	
Agent Test1	Test1				Active	

2. Assigned Agent Test1 and Agent Test2 to report to Agent Test Supv.

Assigned Agent Test1 and Agent Test2 to Agent Test Supv.

User Settings

Employee Status:

Title:

Department:

Reports To:

Email address:

Other email address:

Office Phone:

Mobile:

Other:

Fax:

Home Phone:

3. Created new Team called Test Team

Teams: Test Team Help Wiki

* Indicates required field

Team Name:

Description:

4. Added Users:

- Agent Test1
- Agent Test2

NOTE: Supv. Automatically added to the team

New Users to Test Team

Teams: Test Team Print Help Wiki

Team Name: Test Team

Description: Created on 3/19/07 by Promero (Holly Somers) for documentation purposes.

Users Previous (1 - 3 of 3) Next

Name	User Name	Membership	Email	Phone
Agent Test2	test2	Member		<input type="checkbox"/> rem
Agent Test Supv	Supv	Member Reports-to		
Agent Test1	Test1	Member		<input type="checkbox"/> rem

5. Created two (2) new Accounts

- Test Account Promero and assigned to Test1 User
- Test Account 2 Promero and assigned to Test2 User

6. Logged off and Logged on as Test1 User.

- Test1 User saw both Test Account Promero and Test Account 2 Promero, Inc

Test1 User is able to see both accounts.



The screenshot shows a web interface titled "Account List" with a table containing two rows. The first row is "Test Account 2 Promero" with columns for Account Name, City, Phone, Team, and User. The second row is "Test Account Promero" with the same columns. Arrows point from the text "Test1 User is able to see both accounts." to both rows in the table.

Account Name	City	Phone	Team	User
Test Account 2 Promero	.		Test Team	Test1
Test Account Promero	.	954-935-8861	Test Team	test2

7. Logged off and Logged on as Test2 User:

- Test2 use saw both Test Account Promero and Test Account 2 Promero.

Test2 User is able to see both accounts.



The screenshot shows a web interface titled "Account List" with a table containing two rows. The first row is "Test Account 2 Promero" with columns for Account Name, City, Phone, Team, and User. The second row is "Test Account Promero" with the same columns. Arrows point from the text "Test2 User is able to see both accounts." to both rows in the table.

Account Name	City	Phone	Team	User
Test Account 2 Promero	.		Test Team	Test1
Test Account Promero	.	954-935-8861	Test Team	test2

8. Logged off and Logged on as supv user

- Supv. User saw both Test Account Promero and Test Account 2 Promero.

Test2 User is able to see both accounts.



The screenshot shows a web interface titled "Account List" with a table containing two rows. The first row is "Test Account 2 Promero" with columns for Account Name, City, Phone, Team, and User. The second row is "Test Account Promero" with the same columns. Arrows point from the text "Test2 User is able to see both accounts." to both rows in the table.

Account Name	City	Phone	Team	User
Test Account 2 Promero	.		Test Team	Test1
Test Account Promero	.	954-935-8861	Test Team	test2