

## **Setting up a Team (Identity Sharing)**

Click the My Matrix Tab, then the "Settings" link. At the bottom of the My Settings screen, you will find the "Team Settings" section. Click the link labeled "Click here to create a "Team" and then again on the next screen.

Type in the agent public ID you want to add to your team. If you do not know the ID then ask the agent for it. Select whether you want this colleague to impersonate you or Work on Behalf of you. Descriptions for both will be on the screen when making your choice. Click the "Add" button.

After adding your first team member, you can control the following:

- Add additional team members (click the link "Click here to add a team member and/or someone that can work as you.")
- Delete team members or edit their impersonate/work on behalf status.
- Name your team (optional). Be sure to click the "Save" button after typing in your name.
- Set yourself up to either impersonate or work on behalf of the team.
- Allow team members the option of switching between their own names and the Team name when printing and emailing to Team Contacts. Be sure to click the "Save" button after checking or un-checking this box.
- Disable the team function.

After enabling the Team function, you will be alerted to it on the Home page each time you log in: A link is included to go straight to the Team Settings screen.

When one of your team members logs in, they can switch from their own individual login to the team login by clicking on their name in the upper right corner of the screen to open the select popup. There they can click to select the team name (or your name if you did not create a team name).

They can now see in the upper right (and highlighted in yellow on the Home page) that they are working as the team. When they click on any of the My Matrix options (Contact, Saved Searches, Email History, etc.), they will have access only to your (the Team's) items. When sending an email, if they are set to work on behalf of you, they can select whether the email comes from the Team (with their email address) or just from them alone:

If they are set to impersonate you, they have the same choice except that if they select the Team, it will use your email address, not theirs.

To leave working as the team and go back to working as yourself, click the "Working as" link in the upper right of the screen and click to select your own name.