

Prepare for your Team Command Account

How is Your Team Structured?

Based on your team structure, follow the directions listed below that best fit your Team

Partner/Spouse Team

You often share everything and need equal access in Command to collaborate. In this case, it's unlikely for you to use personal Command accounts.

Recommendation:

- Each team member gets **Unlimited Permissions**
- **Turn off** each agent's personal Command Account

Standard Team

You often have at least one admin and multiple agents. Admins need to help be able to help everyone, and your agents only need access to their sphere and what they are assigned to. In this case, it's unlikely for you to use personal Command accounts.

Recommendation:

- Admins get **Enhanced Permissions**
- Agents get **Standard Permissions**
- **Turn off** each associate's personal Command Account

Non-Standard Team

You run your business in a unique way. Some of your agents work their own separate database/transactions, in addition to team business, while others solely focus on the team.

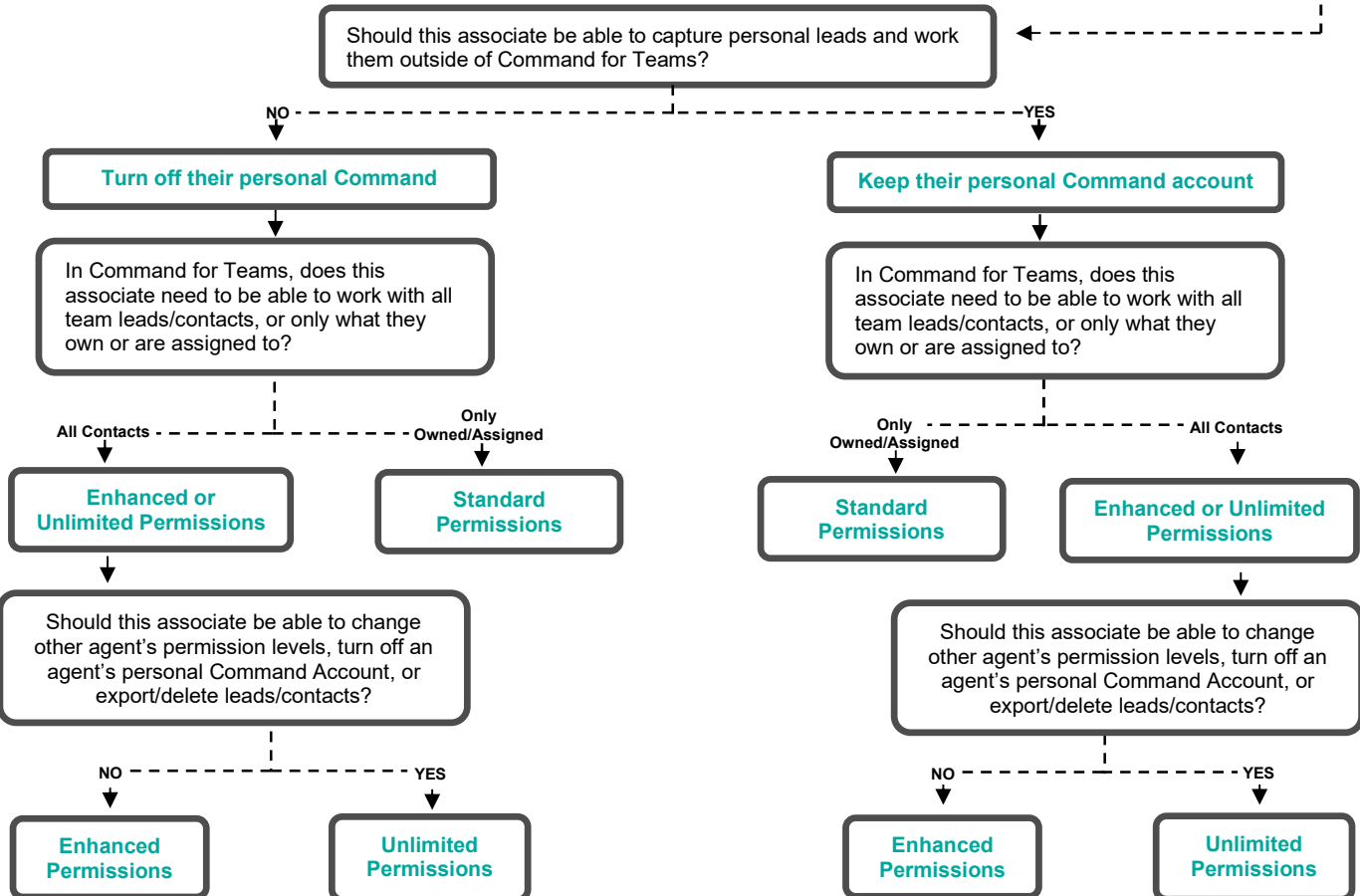
Recommendation:

- Review each associate on your team, on an individual basis, and ask questions about their team needs and role. **Use the decision tree below** and the next page to map out how your Command for Teams account should be set up.

[Click here to learn more about transitioning to your team Command account](#)

Decide Who Gets Access to What

Review each associate on your team and use the decision tree below to determine their appropriate permissions



Definitions and Resources

Additional resources and term definitions

Permission Settings:

Standard Permissions: this will be the basic permission level for most agents on your team. This is also the default permission level for all associates on your team. Agents with Standard permissions can only work with their owned or assigned leads/contacts, including in SmartPlans.

Enhanced Permissions: this is the basic permission level for the admins on your team. This gives them access to manage any lead/contact, in the team Command account, and access to create, edit, or delete team tags, lead sources, custom fields and SmartPlans.

Unlimited Permissions: this is the permission level that all Rainmakers will have. A Rainmaker can give this to an associate on their team but be careful with this permission level. This permission level gives full access to Command for Teams, including the ability to export/delete team-owned leads and contacts, and change team member permission levels, turn on/off an associate's personal Command, add guest user admin accounts, and request changes to the team roster.

[Click here to learn more about Permissions](#)

Personal Command Settings:

Personal Command Account Turned On: team-owned leads/contacts will migrate to the team Command account, and personally owned leads/contacts will stay in their personal Command account. These two databases are kept separate, and the team will have no visibility into the agent's personal Command account.

Personal Command Account Turned Off: all the leads/contacts that the agent personally owns will migrate over to Command for Teams, though the agent will retain ownership. All the work they do in Command will happen in the team Command account, using team models and standards.

[Click here to learn more about personal and team Command](#)

Map Out Your Team Structure

Use this page to map out the correct permissions for each member of your team

Team Member Name	Personal Command		Permission Level		
1.	On	Off	Standard	Enhanced	Unlimited
2.	On	Off	Standard	Enhanced	Unlimited
3.	On	Off	Standard	Enhanced	Unlimited
4.	On	Off	Standard	Enhanced	Unlimited
5.	On	Off	Standard	Enhanced	Unlimited
6.	On	Off	Standard	Enhanced	Unlimited
7.	On	Off	Standard	Enhanced	Unlimited
8.	On	Off	Standard	Enhanced	Unlimited
9.	On	Off	Standard	Enhanced	Unlimited
10.	On	Off	Standard	Enhanced	Unlimited
11.	On	Off	Standard	Enhanced	Unlimited
12.	On	Off	Standard	Enhanced	Unlimited
13.	On	Off	Standard	Enhanced	Unlimited
14.	On	Off	Standard	Enhanced	Unlimited
15.	On	Off	Standard	Enhanced	Unlimited
16.	On	Off	Standard	Enhanced	Unlimited
17.	On	Off	Standard	Enhanced	Unlimited
18.	On	Off	Standard	Enhanced	Unlimited
19.	On	Off	Standard	Enhanced	Unlimited
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23.	On	Off	Standard	Enhanced	Unlimited
24.	On	Off	Standard	Enhanced	Unlimited
25.	On	Off	Standard	Enhanced	Unlimited
26.	On	Off	Standard	Enhanced	Unlimited
27.	On	Off	Standard	Enhanced	Unlimited
28.	On	Off	Standard	Enhanced	Unlimited
29.	On	Off	Standard	Enhanced	Unlimited
30.	On	Off	Standard	Enhanced	Unlimited