Creating A Sales Organization Folder In Administration

1. Log In to **Administration**. If you do not have your log in credentials contact your system administrator. (Image 1)

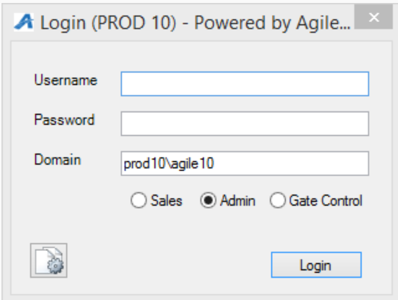

Image 1

2. Right Click on the **Corporate Organization** icon. 

3. Select **New Organization.** (Image 2)

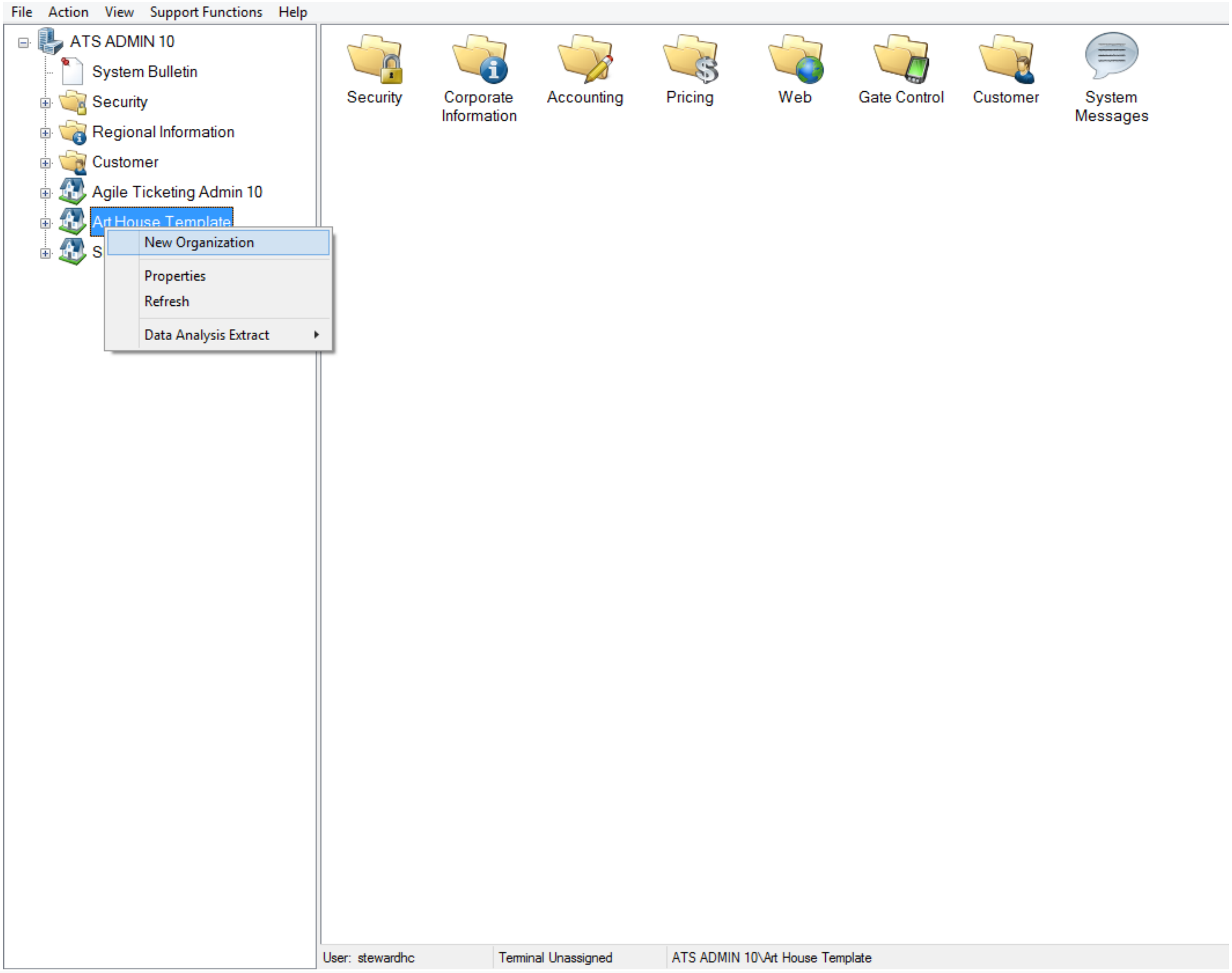

Image 2

4. Type the **Name** of the new folder and create a **Short Name** in the designated boxes. Examples of folder names include: Events, Merchandise, Memberships, etc.(Image 3)

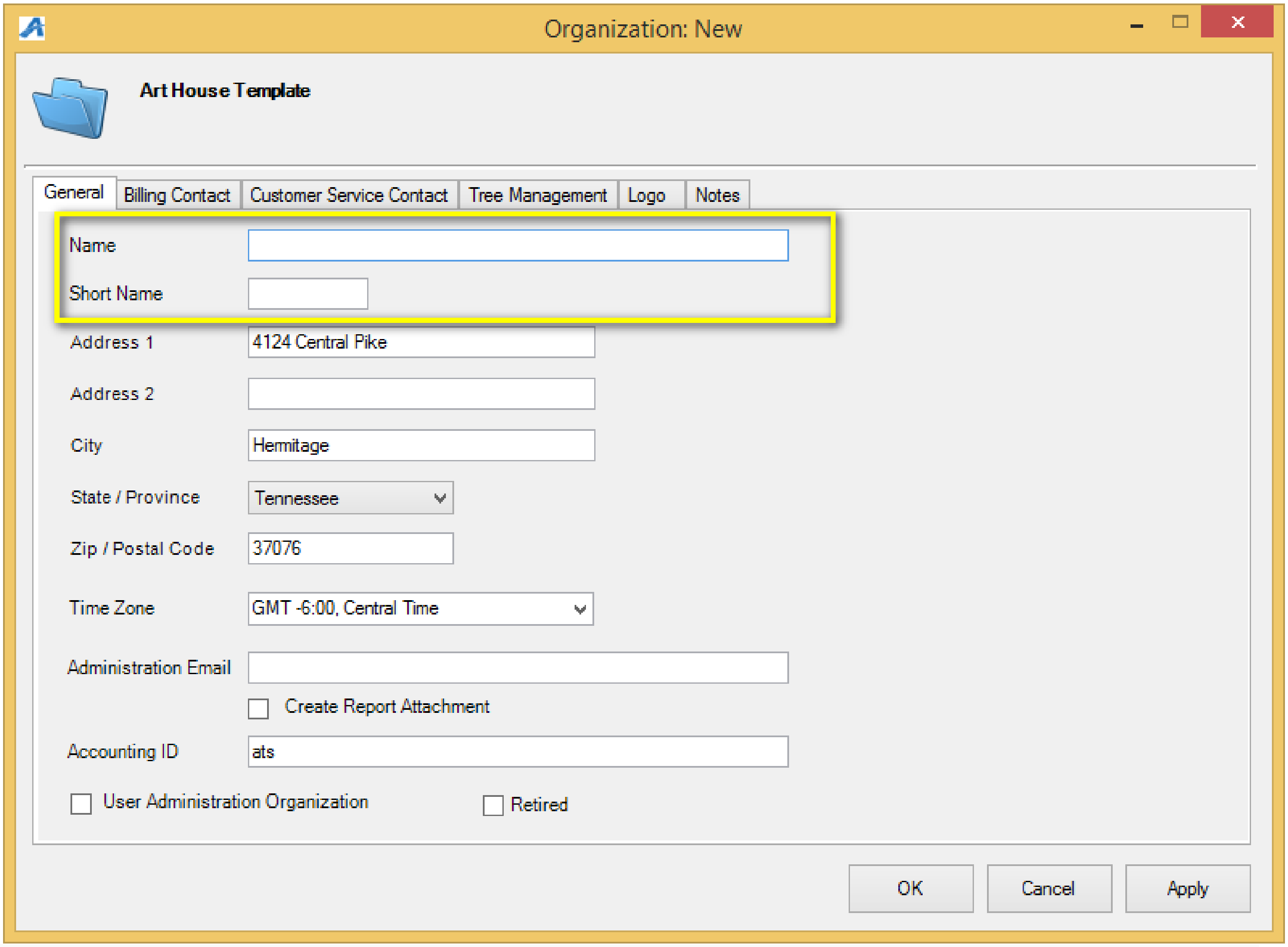

Image 3

5. In the pop up screen select **Tree Management .** (Image 4)

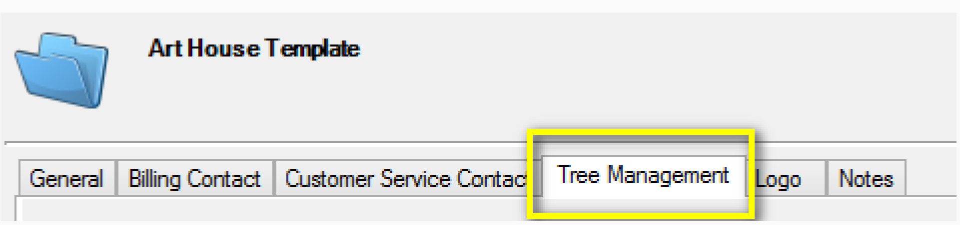

Image 4

6. In this screen you will select the **Sales Line** options for this folder. These options are based on what will be housed in the folder.(i.e. events, memberships, or catalog items etc..) (Image 5).

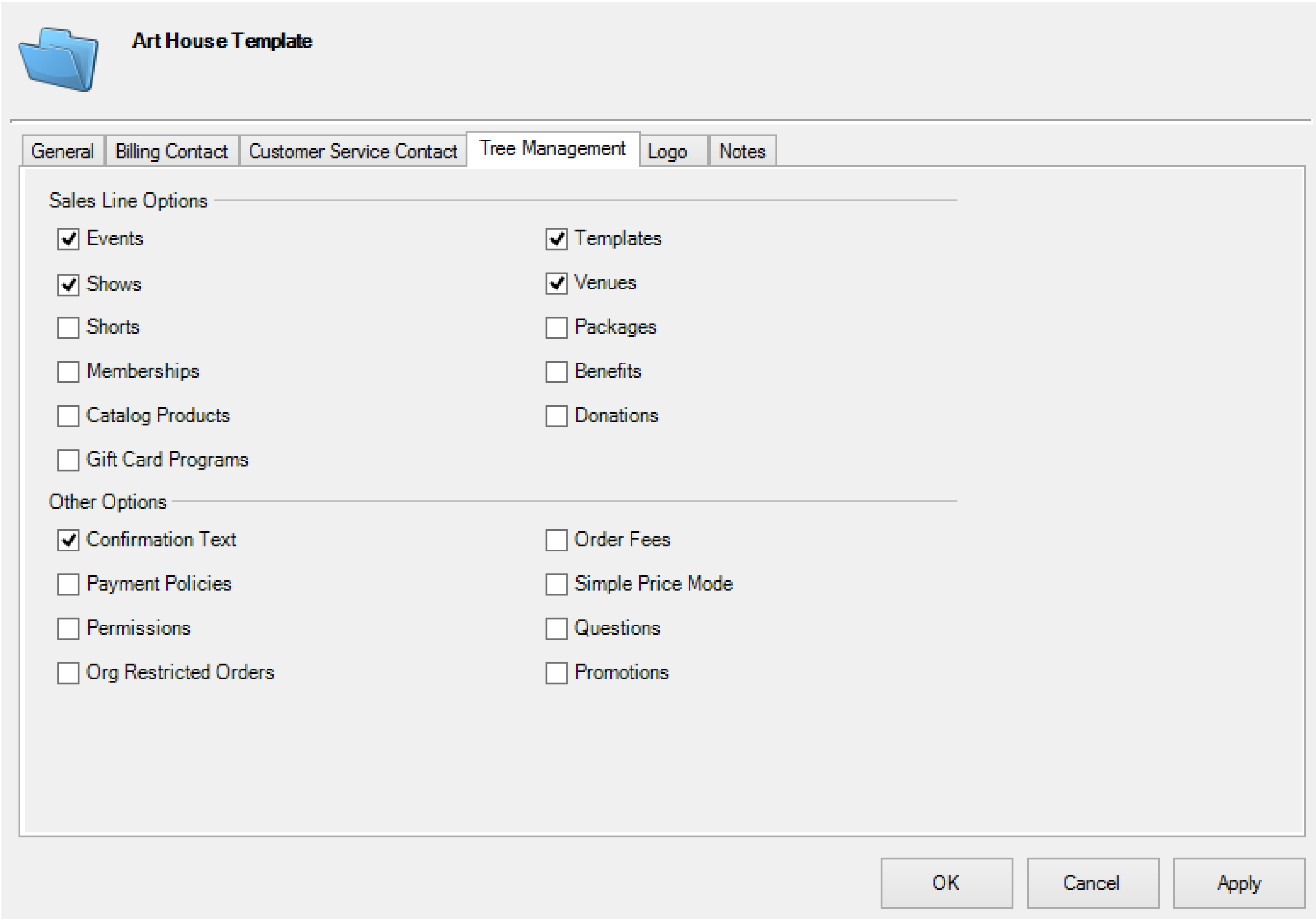

Image 5

7. Once you have selected your options click **Apply** to save the information and**OK** to complete the creation of your folder. (Image 6)

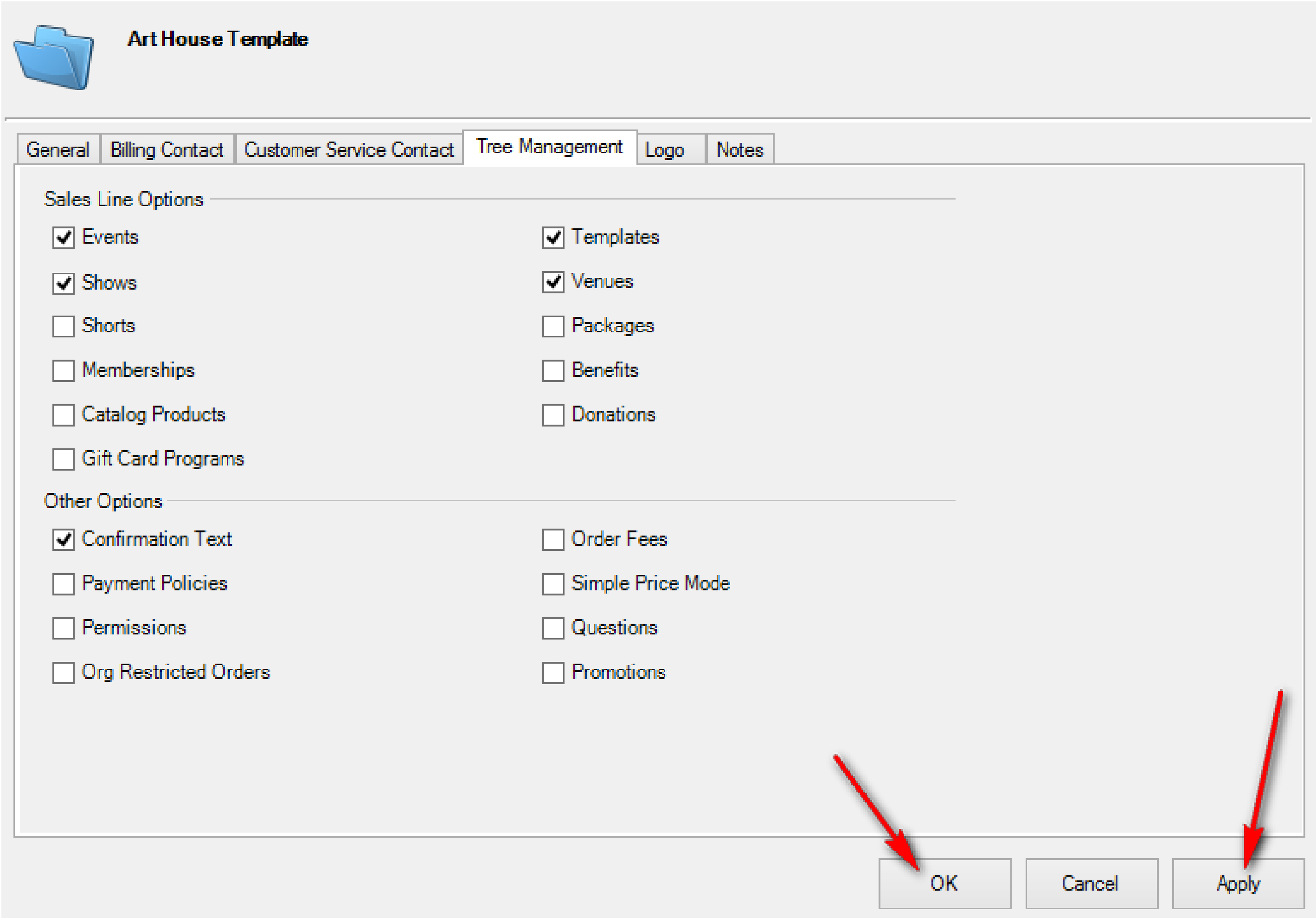

Image 6

8. When you open new sales folder you will see the different administration tools in your completed folder. (Image 7)

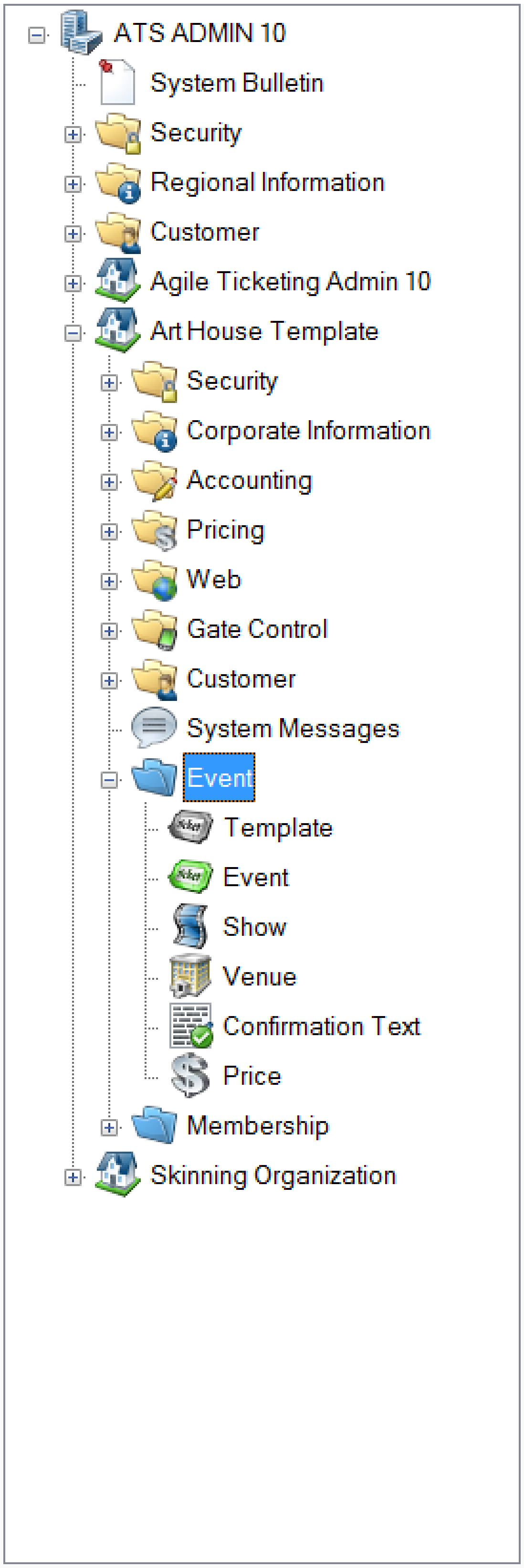

Image 7

9. You are now ready to create items or events in your sales folder.