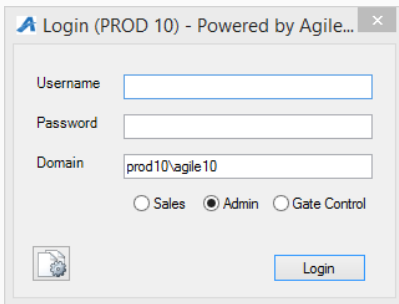


Creating A Sales Organization Folder In Administration

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



Login (PROD 10) - Powered by Agile...

Username

Password

Domain

Sales Admin Gate Control

Image 1



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

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

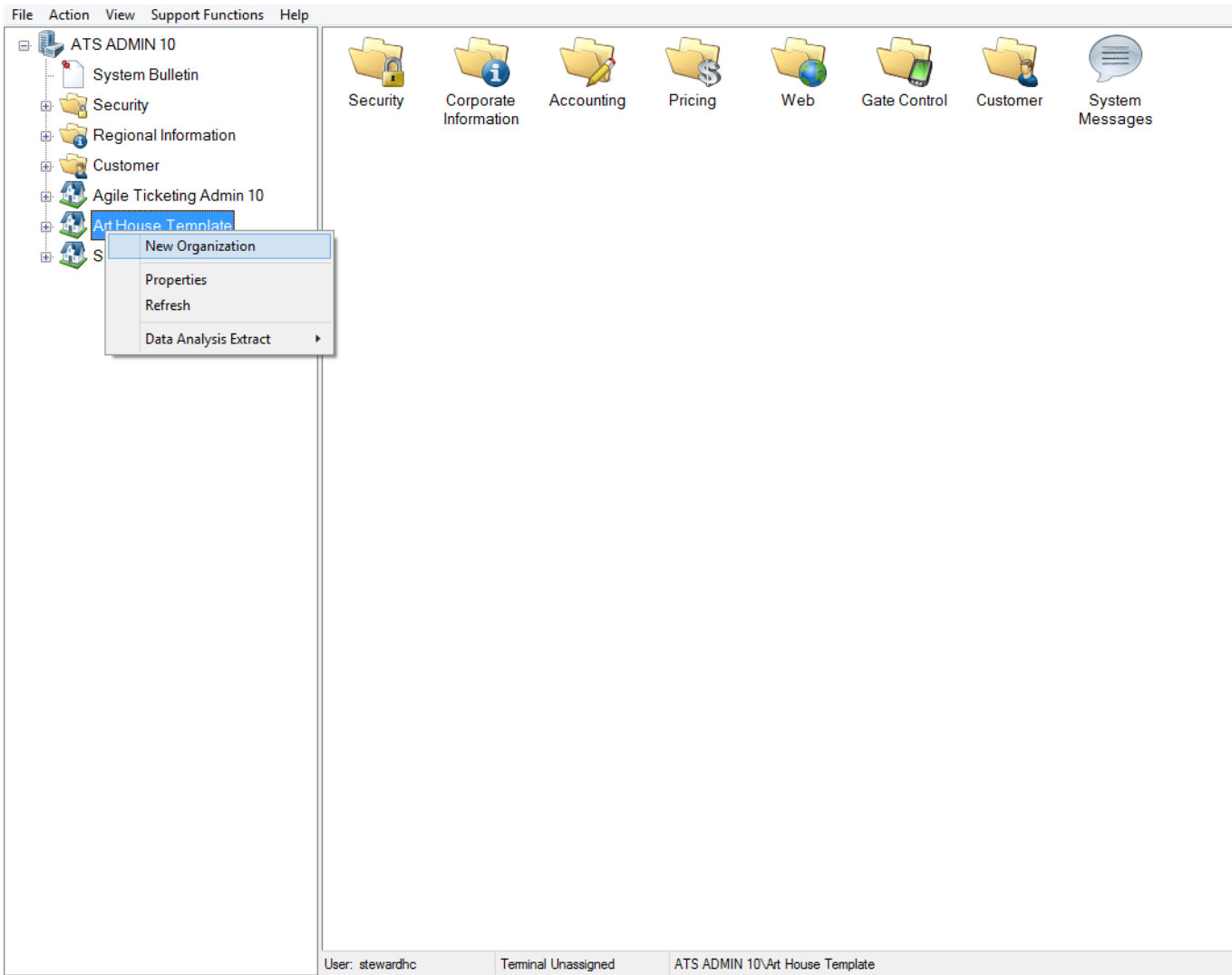


Image 2

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)

The screenshot shows a window titled "Organization: New" with a yellow border. Inside, there is a folder icon labeled "Art House Template". Below the folder name is a tabbed interface with tabs for "General", "Billing Contact", "Customer Service Contact", "Tree Management", "Logo", and "Notes". The "General" tab is active and contains the following fields:

- Name: [Empty text box]
- Short Name: [Empty text box]
- Address 1: 4124 Central Pike
- Address 2: [Empty text box]
- City: Hermitage
- State / Province: Tennessee (dropdown menu)
- Zip / Postal Code: 37076
- Time Zone: GMT -6:00, Central Time (dropdown menu)
- Administration Email: [Empty text box]
- Create Report Attachment
- Accounting ID: ats
- User Administration Organization
- Retired

At the bottom right of the dialog are three buttons: "OK", "Cancel", and "Apply".

Image 3

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

This image is a close-up of the tabbed interface from the previous image. The "Tree Management" tab is highlighted with a yellow box. The other tabs visible are "General", "Billing Contact", "Customer Service Contact", "Logo", and "Notes".

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).

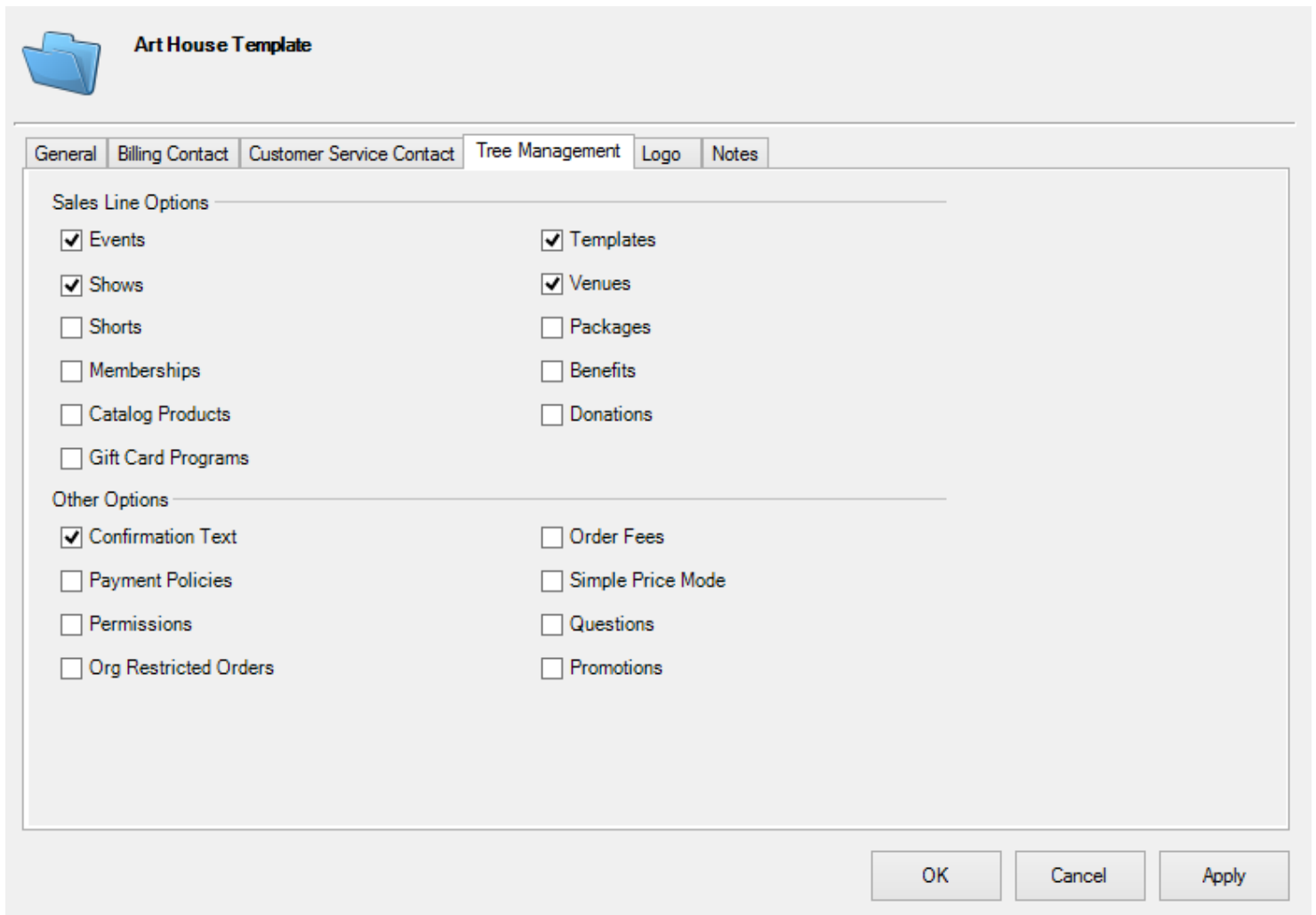


Image 5

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

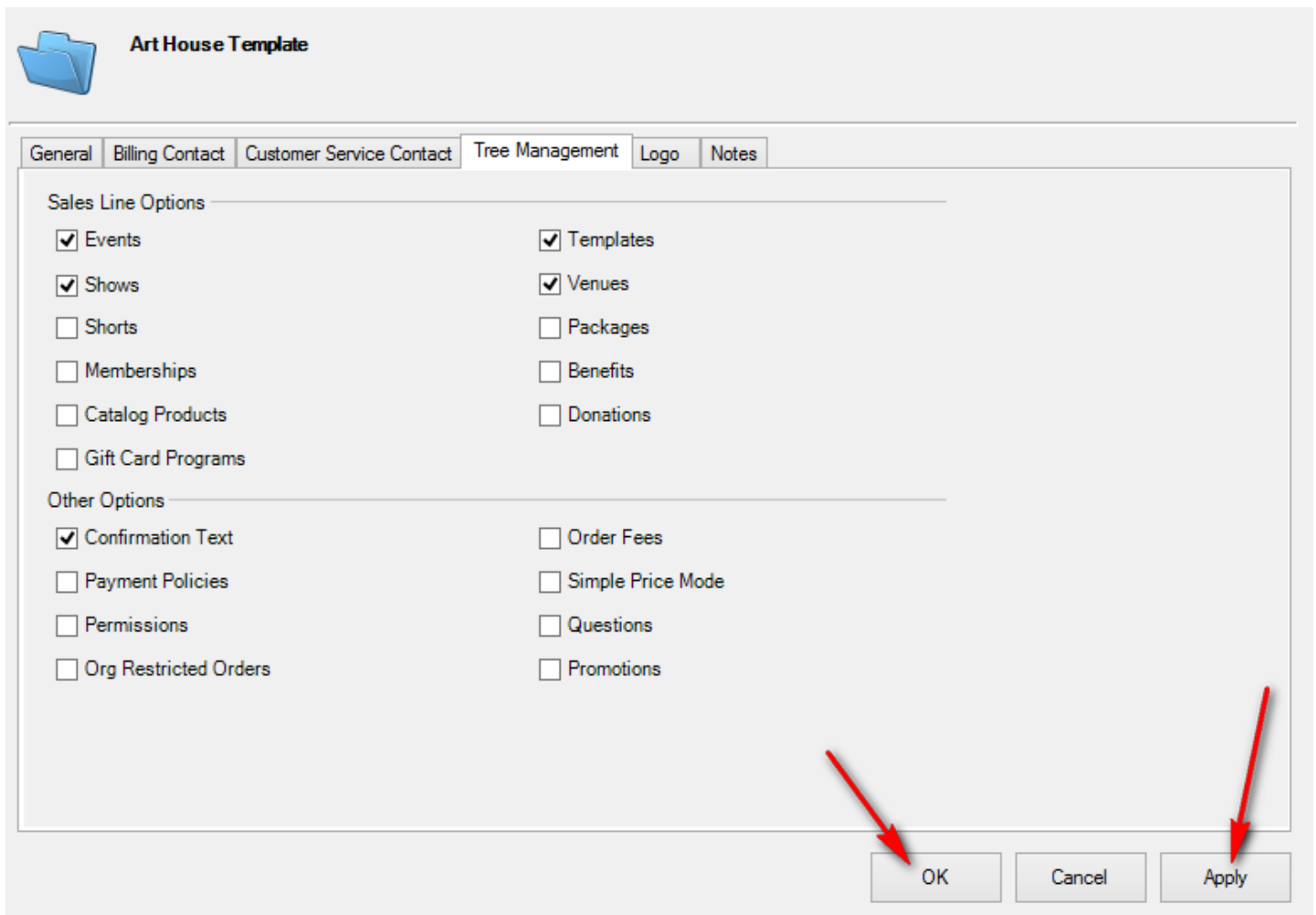


Image 6

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

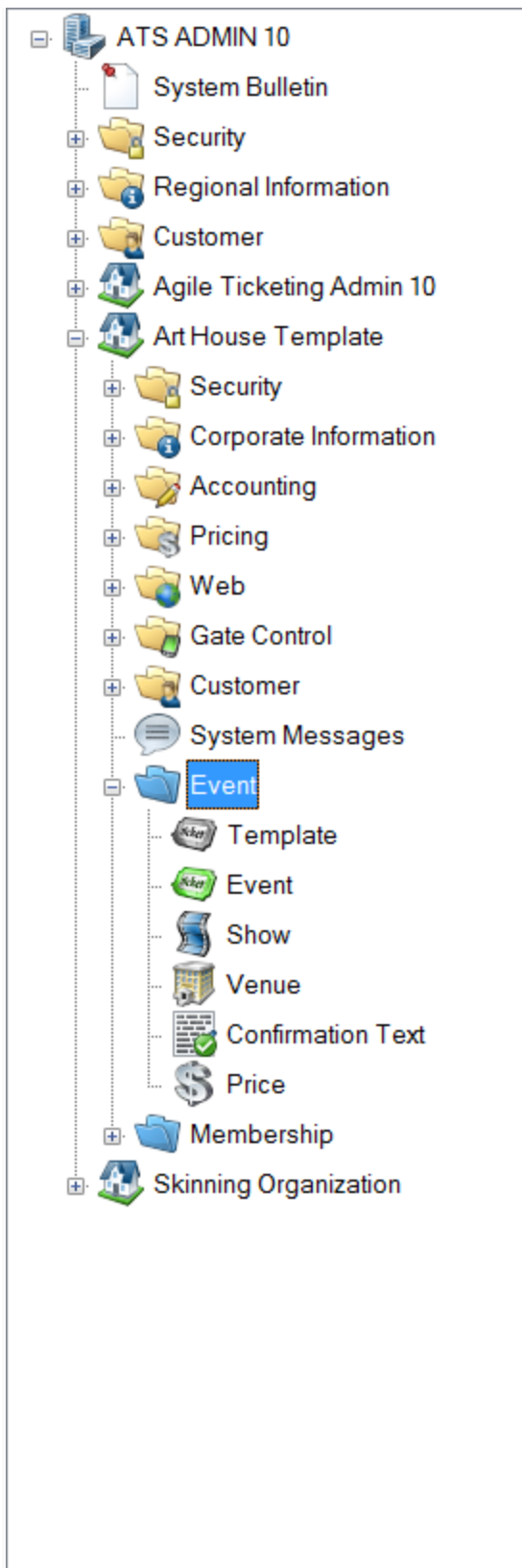


Image 7

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