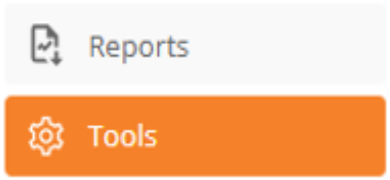
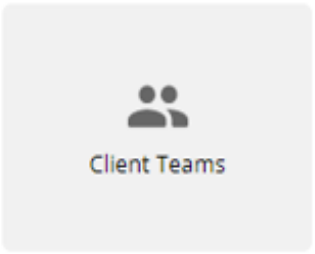
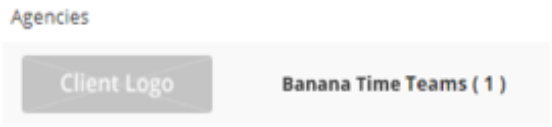
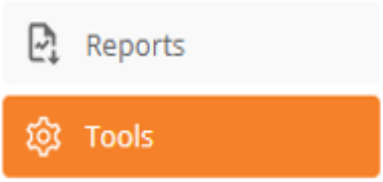
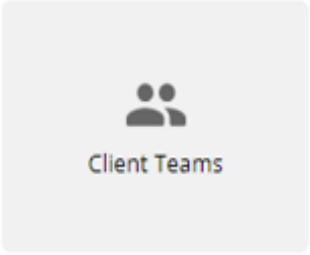
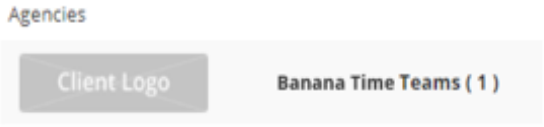
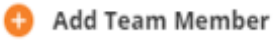
Client Teams Fact Sheet

Adding a Team Member to a Client Team		
Step 1	Click on **Tools**	
Step 2	Click on **Clients Teams**	
Step 3	Find the Client that you want to add the Team Member to	
Step 4	Click on the **+** icon to show a list of the Client Teams	
Step 5	Click on the pen icon to show the **Edit Team** pop-up window	
Step 6	Click on **Add Team Member** to add the Team Member to the Client Team	
Step 7	Type in the name of the Team Member you want to add	
Step 8	Click on **Save & Close** to complete adding to the Client Team	

Client Teams Fact Sheet

Creating a new Client Team		
Step 1	Click on **Tools**	
Step 2	Click on **Clients Teams**	
Step 3	Find the Client that you want to add the Team Member to	
Step 4	Click on the + icon to show a list of the Client Teams	
Step 5	Click on **Create New Client Team** to show the pop-up window	
Step 6	Click on **Add Team Member** to add the Team Member to the Client Team	
Step 7	Type in the name of the Team Member you want to add	
Step 8	Click on **Save & Close** to complete adding to the Client Team	