



# Managing Team Accounts

For Team Leaders and Office Admins

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## Overview

- ✓ Sign into LeadStreet
- ✓ Adding a Team Member
- ✓ Assigning Member Rights
- ✓ Removing a Team Member
- ✓ Team Account Settings
- ✓ Deleting a Team

- Adding Members To A Team Account
- Settings & Granting Access To Team Members
- Removing Team Members
- Access Settings For The Team Account
- Deleting A Team Account (office admins only)

Note: This material is applicable only for team leaders, assistants or office admins.

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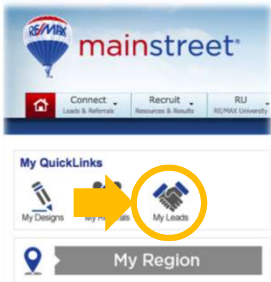


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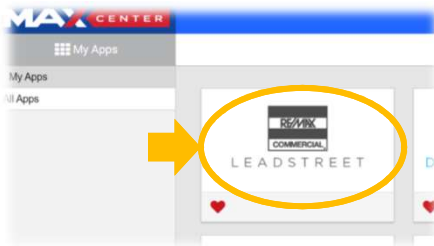
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## Signing Into LeadStreet

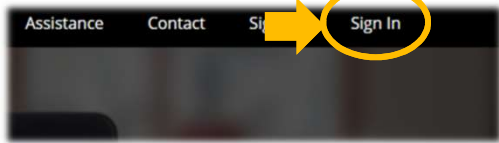
**MainStreet**



**Max Center**



[www.engageREMarketing.com](http://www.engageREMarketing.com)



Use Any One Of These Methods

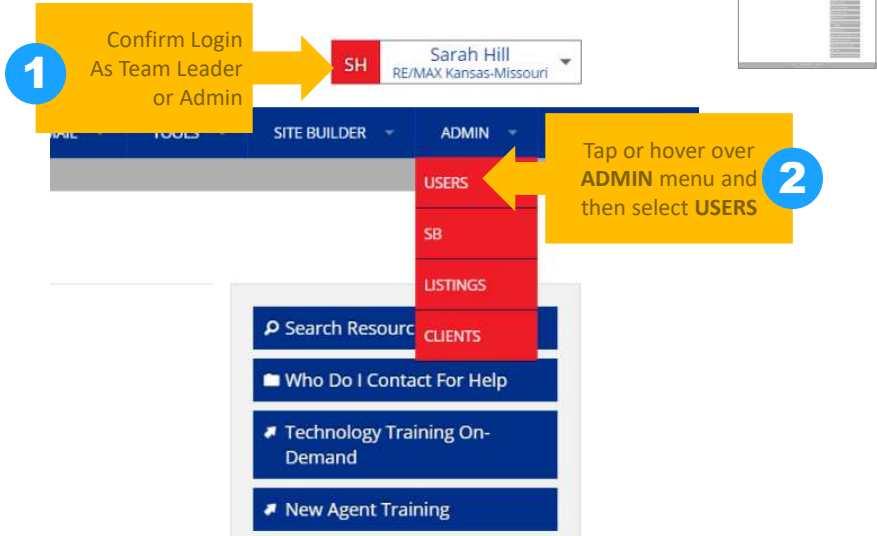
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## Access Admin Controls For Team



**1** Confirm Login As Team Leader or Admin

**2** Tap or hover over ADMIN menu and then select **USERS**

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## Adding a Team Member

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AGENT ROSTER ~ (USERS)

Team Roster for: Fulton Property Team

- [Control Team Member Access](#)

Acct. ID	Account Name	Title	OA	TS	LI	Email	User
369988	Fulton Property Team	Team Website		✓			<a href="#">Edit</a>
54248	Gigi Perry- The Fred Perry Team	Manager, website		✓			<a href="#">Edit</a>
362063	Lisa Fulton Demo	Demo-Test Site, no display					<a href="#">Edit</a>

[OA] - Office Account  
[TS] - Team Site  
[LI] - Has Logged In

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## Adding a Team Member

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HOME

LEADS

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ADMIN

RESOURCES

TEAM OVERVIEW:

All: Has access to all accounts within the team.

Team: Has access to own and to the team account.

Others: Has access to own and to specific accounts.

Acct. ID	Name	Account Type	Team	Access:	All	Team	Others
Add Team Member/Leader:							
	LLC eCare Office ()						
	Adria Hartwig						
	Member						
<a href="#">ADD TO TEAM</a>							

CON

ACCOUNT ACCESS

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## Set Access Rights & Forwarding

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Member

**ADD TO TEAM**

**CONTROL ACCOUNT ACCESS**

Users in the left column have access to the account controls (intranet tool) for accounts on the right.

Acct. ID	Name	Curtis Stock	Curtis Stock
44753	Curtis Stock		

**UPDATE** **CL**

**TEAM FORWARDING - ROSTER LINKS AND LEADS**

Select the accounts each team member should have access to. **1**

Select **UPDATE** to Set Access Rights **2**

Select **Edit** to Change Individual Roster And Lead Forwarding Settings **3**

**NOTE:** Team members can access their own account and optionally, the team account and other members' accounts.

Anyone on the roster with a role of "office staff" or "unlicensed assistant" can be added to the team and be given administrative access to the team account (in addition to the team leader).

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## Removing A Team Member

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**1** Confirm Login As Office Admin or Team Leader

SH Sarah Hill  
RE/MAX Kansas-Missouri

TOOLS SITE BUILDER ADMIN

USERS SB LISTINGS CLIENTS

Tap or hover over **ADMIN** menu and then select **USERS** **2**


Search Resource

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## Access Team Account Settings



**AGENT ROSTER ~ (USERS)**  
 Team Roster for: Fulton Property Team  
 • [Control Team Member Access](#)


Click on Control Team Member Access

➔

Acct. ID	Account Name	Title	OA	TS	LI	Email	User
369988	Fulton Property Team	Team Website	Team	✓			<a href="#">Edit</a>
54248	Gigi Perry- The Fred Perry Team	Manager, website	The Fred Perry Team - Sales Associate	✓			<a href="#">Edit</a>
362063	Lisa Fulton Demo	Demo-Test Site, no display	Demo Agent				<a href="#">Edit</a>


[OA] - Office Account  
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## Removing a Team Member



**TEAM OVERVIEW: FULTON PROPERTY TEAM**  
 Control account access of team members to accounts within the team.  
 All: Has access to all accounts within the team.  
 Team: Has access to own and to the team account.  
 Others: Has access to own and to specific accounts.

Acct. ID	Name	Account Type	Team	Access:	All	Team	Others
369990	Fulton Property Team	Team Website	Team	<a href="#">User</a> <a href="#">SB</a> <a href="#">List</a>			
362063	Lisa Fulton Demo	Demo-Test Site, no display	<a href="#">EditLeader</a>	<a href="#">User</a> <a href="#">SB</a> <a href="#">List</a>			<a href="#">Remove</a>
54248	Gigi Perry- The Fred Pe...	Manager, website	<a href="#">EditMember</a>	<a href="#">User</a> <a href="#">SB</a> <a href="#">List</a>			<a href="#">Remove</a>
350886	Sarah Boston	Sales Associate, website	<a href="#">EditMember</a>	<a href="#">User</a> <a href="#">SB</a> <a href="#">List</a>			<a href="#">Remove</a>

Click on Remove next to the team member to be deleted

➔

NOTE: Only Team Leaders or admins can remove team members.

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## Modifying Team Account Settings

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**1** Confirm Login As Team Leader or Admin

**2** Tap or hover over ADMIN menu and then select USERS

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Team Roster for: Fulton Property Team

[Control Team Member Access](#)

Acct. ID	Account Name	Account Type	Title	TS	LI	Email	User
369988	Fulton Property Team	Team Website	Team				<a href="#">Edit</a>
54248	Gigi Perry- The Fred Perry Team	Manager, website	The Fre				<a href="#">Edit</a>
362063	Lisa Fulton Demo	Demo-Test Site, no display	Demo A				<a href="#">Edit</a>

[OA] - Office Account  
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Click on the **Edit** link to the far right of the team account

NOTE: Editing the team account gives access to the team's profile, clients, listings, and SiteBuilder areas.

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## Deleting a Team

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- Sign Into LeadStreet as an **office admin**, select team from office roster.
- Remove all team members from the team account.
- Transfer all contacts out of the team account.
- Make note of any SiteBuilder content that needs to be deleted or moved to a different account (must be done manually).
- Delete custom domain from the team account. NOTE: if you are using this domain name for email, contact Tech Assist BEFORE removing the domain.
- Email [techassist@engageremarketing.com](mailto:techassist@engageremarketing.com) with a request to delete the team from LeadStreet

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TECH ASSIST

## How To Contact Tech Assist


**EMAIL**  
TechAssist@engageREmarketing.com


**PHONE**  
800-666-7799


**WEB**  
[www.engageREmarketing.com/TechAssist](http://www.engageREmarketing.com/TechAssist)


**TRAINING EVENTS**  
[www.engageREmarketing.com/Events](http://www.engageREmarketing.com/Events)

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