Working with Teams

If you have groups of staff that routinely work together on tasks and events, you can create teams to connect them and streamline those assignments. Maybe you have a morning and afternoon crews that routinely take on similar tasks based on the time of day they work. How about specialized teams that work on certain aspects of your business, like a harvesting group, mechanics in the shop, or farmers market workers that always attend your events. Or perhaps you might even have different locations across multiple areas, with different staff working each farm. No matter how you want to organize them, Farmbrite can help you connect users together in teams to streamline your farm work assignments.
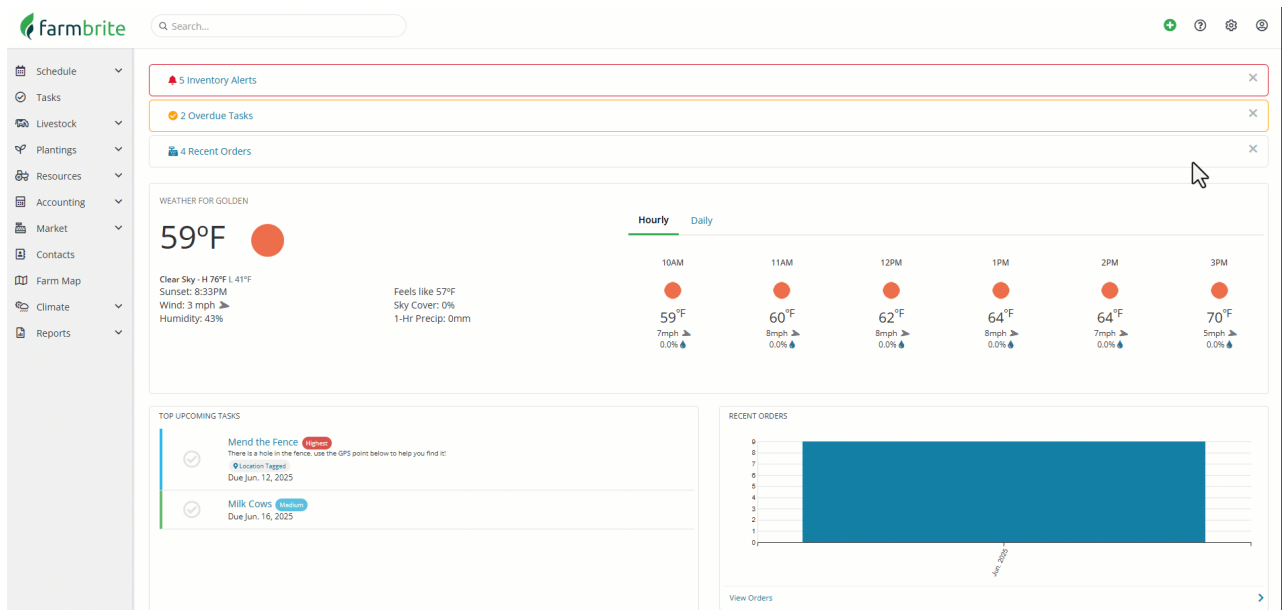
Creating Teams

To define your different teams, navigate to Settings (gear icon) and then select Teams. Just select New Team, and give your team a name. From there you can select your team members and save. In our example below we create a new team for Aurora Farms, a separate location from our other farms with it's own staff members.
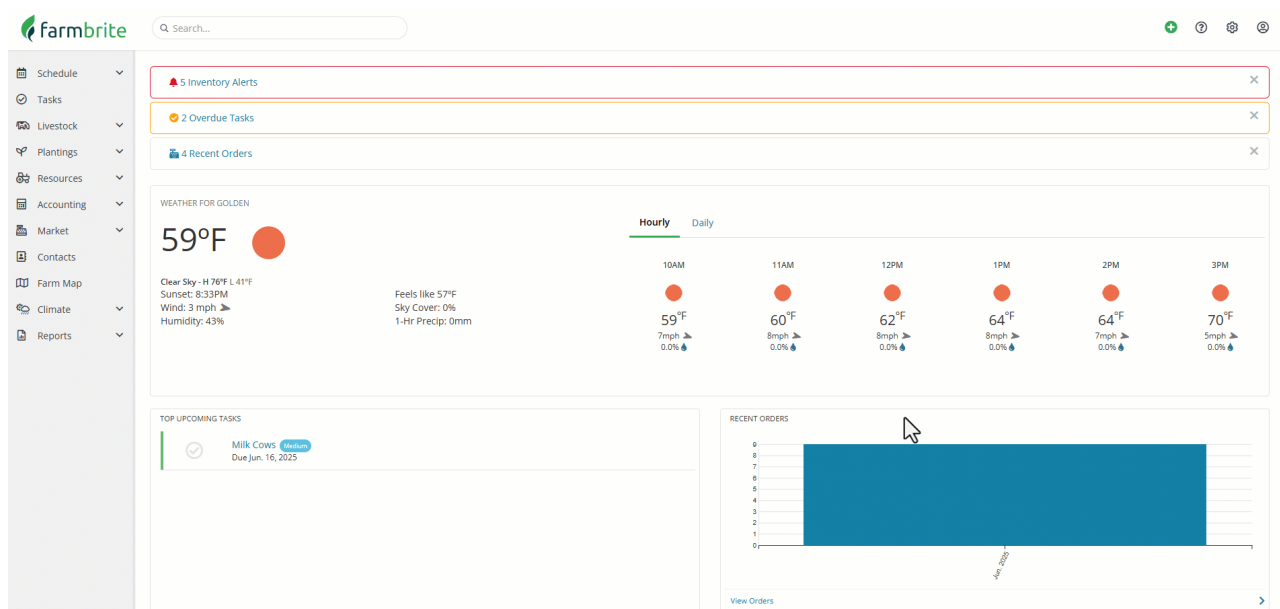
Adding Users to Teams from their Profile

Once you have created your teams, you can also add users to them directly from the user profile. Go to Settings and select User, and then pick the Team Membership tab from their profile. You can select what teams they should be included in here and then save. In our example below, we add a new staff member Bobby to the Aurora Farms team we created in the example above.

You can add users to teams via either method. The end results is the same; it is up to you which one you find easier for your immediate needs!

Using Teams for Tasks and Events

After you have created your teams and assigned users to them, you can now use the teams when creating tasks and events. You'll see a dropdown menu to select a team on both of them. You can still assign a main assignee as well, which could be used to designate a team member who ultimately responsible for the task. All team members will receive emailed alerts that the task was assigned to them, and mobile push notifications as well if they have those enabled. You can also add a team selection to task templates and series.

In the example below, we create a task for collect eggs that is assigned to the morning team, while still assigning the overall responsibility to our manager Dennis.

Filtering for Task and Event Assignments

You'll also see Teams listed in the task and events filters. You can use this to see all task sand events that are assigned to that team. Be aware that team tasks and events will also be shown when filtering for specific team members. In our example below, you'll see the tasks filtered for the Morning Crew team, and then for Dennis, and then lastly for Newt, a member of that team.

Let us know if you have any questions as you explore this feature!