

Team Roles

Team Roles allow Users to be treated differently within a Team by setting the assignment & notification preferences for each Team individually, instead of by a User's settings.

Best Use Example

A team is made up of at least two levels of Users:

- **Basic Members** – Automatically assigned or manually collect tickets. Receives ticket notifications. Processes tickets assigned to them. Basic Members can be automatically assigned tickets and receive notifications when they are assigned a ticket, and when the Response or Resolve Target for that ticket is about to expire.
- **Team Supervisor** – Aren't assigned tickets. Support Basic Members by assigning & reassigning tickets to ensure they're dealt by the best available team members. Team Supervisors aren't automatically assigned Tickets, and only receive a notification if they are assigned a ticket by a System Admin or by another Team Supervisor.

If each of your Teams operates slightly differently, you can create different Team Roles specific for each Team.

Note

- 1) You can add as many new Team Roles as you need, and edit the existing default Team Roles too
- 2) A User could be a Basic Member of one Team, but a Supervisor in another

How to create new Team Roles

Go to: Settings > General > Permissions > Team Roles

Name	Ticket Reassignment	Tickets Access	Reply Access	Web Notifications	Email Notifications	Actions
Basic Member		Own Tickets only	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Edit
Team Supervisor	Return to Team, Self, Team Members, Any Team	All Tickets in the Team	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Edit Delete

To create a new Team Role

1. Click the green **+ New Team Role** button on the top right.
2. Give the Team Role a new name.
3. Choose the Assignment Permissions.
4. Choose the Notification Preferences.
5. Save.

Team Role Details

Name

Basic Member

Assignment Permissions

Read Only

NO

Can be auto-assigned tickets

YES

Can return tickets to original team

NO

Can re-assign tickets to self

NO

Can re-assign tickets to team members

NO

Can re-assign tickets to any team

NO

Can collect available tickets

YES

Tickets Access

Assigned tickets access

NO

Unassigned tickets access

NO

Reply Access

Can free-type reply

YES

Can edit reply signature

YES

Can attach files when replying

YES

Spell-check message when replying

NO

Web Notifications

Assigned ticket notification

YES

Unassigned ticket notification

YES

Pending ticket notification

NO

Response target expiry notification

YES

Resolve target expiry notification

YES

Email Notifications

Assigned ticket notification

NO

Unassigned ticket notification

NO

Pending ticket notification

NO

Response target expiry notification

NO

Resolve target expiry notification

NO

Customers Access

Can edit Customer Intelligence Panel

NO

Cancel

Save

Users are assigned to a Team Role from the Edit Page of each Team.

Go to: Settings > General > Teams .

Click the blue “Edit” button to view the Edit Page

Click the input box for each Team Role to add Users to that Team Role for this Team.

- Team Roles have to be set for each Team from the Edit page for that Team.
- A User can be assigned a different Team Role for each Team they’re a member of.

All Users in a Team are assigned as Basic Members by default. If a Team Role is removed, any Users that were assigned to that Team Role in any team will be reassigned to the Basic Members Team Role.

Note

1) The Basic Members Team Role cannot be deleted, but it can be edited and renamed.

Property	Description
Assignment Permissions	
Read Only	When YES it sets Assignment Permissions within the role to 'Read Only'. This means, all the below assignment permissions will automatically turn to NO and the user will not be able to assign the ticket to himself or reassign it to other members. However, they will be able to view tickets, add notes or scheduled tasks on the ticket
Can be auto-assigned tickets	When YES tickets are auto assigned in team

Property	Description
Can return tickets to Original team	When YES can return tickets to original team
Can reassign tickets to self	When YES can reassign tickets to self
Can reassign tickets to team members	When YES can reassign tickets to self
Can collect available tickets	When YES can Collect available tickets
Ticket Access	
Assigned tickets access	When YES can access assigned Tickets
Unassigned tickets access	When YES can access unassigned Tickets
Reply Access	
Can free type reply	When YES can free type reply
Can edit reply signature	When YES can edit reply signature
Can attach files when replying	When YES can attached files when replying
Spell-check message when replying	When YES, reply is automatically checked for spellings and suggested auto-corrections are displayed for errors
Web Notifications	
Assigned ticket notification	When YES in app notification of ticket being assigned to User
Unassigned ticket notification	When YES in app notification will advise when unassigned ticket is available
Pending ticket notification	When YES in app notification will advise when pending ticket

Property	Description
Response target expiry notification	When YES in app notification of reply being close to Response SLA target
Resolve target expiry notification	When YES in app notification of reply being close to Resolve SLA target
Email Notifications	
Assigned ticket notification	Email is sent to User email address of assigned ticket
Unassigned ticket notification	When YES email is sent if unassigned ticket
Pending ticket notification	When YES email is sent if pending ticket
Response target expiry notification	When YES email is sent to User email address of reply being close to Response SLA target
Resolve target expiry notification	When YES email is sent to User email address of reply being close to Resolve SLA target
Customer Access	
Can edit Customer Intelligence Panel	When YES can edit Customer Intelligence Panel