

# **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

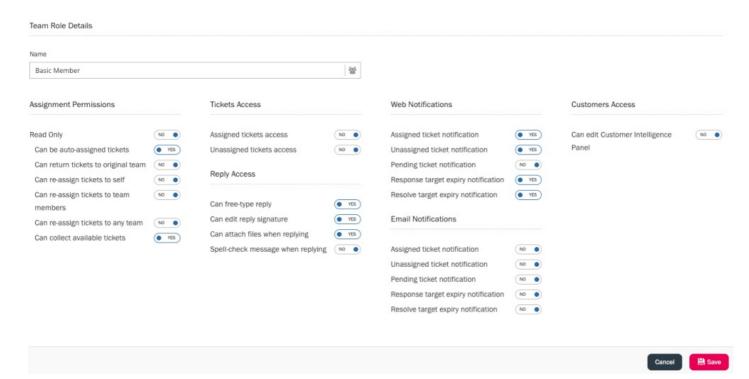
Go to: Settings > General > Permissions > Team Roles



### To create a new Team Role

- 1. Click the green 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.





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 Notifica	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	