

Team Member Management

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Adding and Managing Team Members

[Watch Video](#)

I. Introduction

A. Overview of Team Management in Jwero

It's crucial to give the correct access to the right team members. This ensures that your organization's data stays safe and is only accessed by the people who need it. It also prevents team members from being overwhelmed with resources that don't apply to them.

B. Benefits of Efficient Team Management

1. Work Gets Done Efficiently: Team management helps everyone know their job, so things get done faster and better.

2. People Know What to Do: Everyone in the team understands their tasks and responsibilities, making the work smoother.

3. Less Confusion: When there's good team management, there's less chance of getting confused about who is doing what.

- 4. Keeps Things Organized:** It helps in keeping everything organized, so nothing important gets left out or forgotten.
- 5. Happier Team:** When everyone knows their role and works together, the team is generally happier and more satisfied.
- 6. Better Quality Work:** With good management, the team can focus on doing their best work, leading to better results.
- 7. Team Members Feel Valued:** When each person's strengths are recognized and used, they feel important and valued in the team.
- 8. Easier Problem Solving:** When issues come up, a well-managed team can solve them more easily because everyone knows how to communicate and work together.
- 9. Learning and Growth:** Team members can learn new things and grow in their skills through good management and collaboration.
- 10. Achieving Goals Together:** With effective team management, everyone can work towards and achieve common goals.

II. Getting Started

A. Adding New Team Members in Jwero

When you choose your plan in Jwero, you can bring in new team members as needed.

 Here's a quick example: if you're on the Pro plan, which includes an admin, you can add two more team members. For the Plus plan, you get the admin plus four more team members.

You can adjust the number of team members based on the plan that best fits your needs.

This system allows you to build a team that suits your specific requirements and scale as your organization grows.

TEAM MEMBER LIMIT PLAN WISE

PRODUCT	PRO PLAN	PLUS PLAN
JweroONE	NA	5 Users
Jwero Chats	3 Users	5 Users
Jwero Catalog	3Users	5 Users
Jwero Ecommerce	3 Users	5 Users
Jwero Gold	3 Users	5 Users

*You can always upgrade to add more team members to optimize your workflow.
Contact care@jwero.ai for more.*

B. User Roles and Permissions Overview

“ In Jwero, when we add a team member, we can give them special jobs and decide what they can do. Let's say we're using Jwero Chats. We can choose if they can talk to all customers or just some, or maybe we don't want them to talk to a few customers at all.

So, when a team member logs in, they only see the things the boss said they can see. This helps keep everything organized and makes sure everyone can do their job without seeing too much or too little.

Additional Points:

- This helps in keeping private information secure because only authorized team members can access specific details.
- It makes sure that team members focus on the things that matter to their job and don't get confused by unnecessary information.

C. Prerequisites for Adding Team Members

- ① Before you add someone to the team, you must have their email and phone number. It's important to have this information. Also, you need to decide what this person will be able to do in the team, like what parts of the work they can access.

Additional points:

1. Make sure the email and phone number are correct, so the team member can be reached easily.
2. Choose the right access level for each team member, depending on their role and responsibilities.

III. Adding Team Members

A. Step-by-Step Guide to Adding a New Team Member

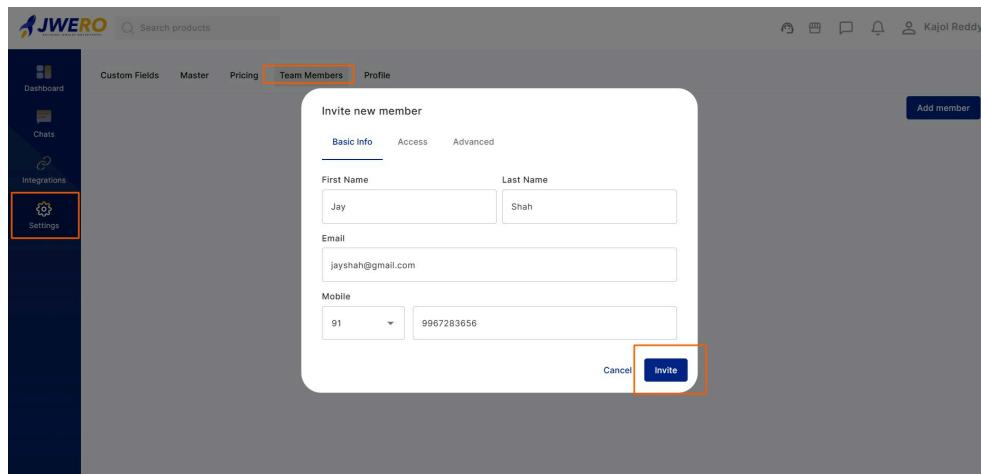
1. Inviting Team Members via Email + Copy Link Method

A. Adding New Team Members in Jwero

Method One: Invite by AUTO EMAIL (Allows team members to create their own password)**

⚠ Important: Make sure to set up Email SMTP before auto-inviting team members via email.

- Go to Settings > Email > Complete Email SMTP.
- Navigate to Settings > Team Members > Add Team Member.
- Add Name, Email, and Contact number.
- Manage Access and click Invite.
- Your team member will receive an invitation link via email. They can accept, create a password, and log in.
- As an admin, you can control their access.
- To revoke access, go to Access and turn off the settings not meant for customers.



Method Two: Invite by COPY LINK (Admin creates a password for team members)**

- Go to Settings > Team Members > Add Team Member.
- Add Name, Email, and Contact number.
- Manage Access and click Invite.
- In the pop-up, find the invitation link. Copy the link and open it in incognito mode.
- Create a password for the team member.
- This method is useful when the admin wants login access or multiple people will use the same login.
- After completion, team members can log in using the provided Email and password.
- Admins can control access, and to revoke access, go to Access and turn off the undesired settings.

Name	Email	Created	Status	Invitation Link	Actions
KJ Shah	Kjshah@gmail.com	Nov 16 2023 04:19 PM	Pending	https://app.jwero.com/invite/KJShah	

(!) Additional Points:

- Ensure Email SMTP setup is done before inviting via email.
- The Copy Link method is handy when multiple people share the same login.
- Admins have full control over team members' access rights.
- Revoking access is simple through the Access settings by turning off specific permissions.

2. Access Management

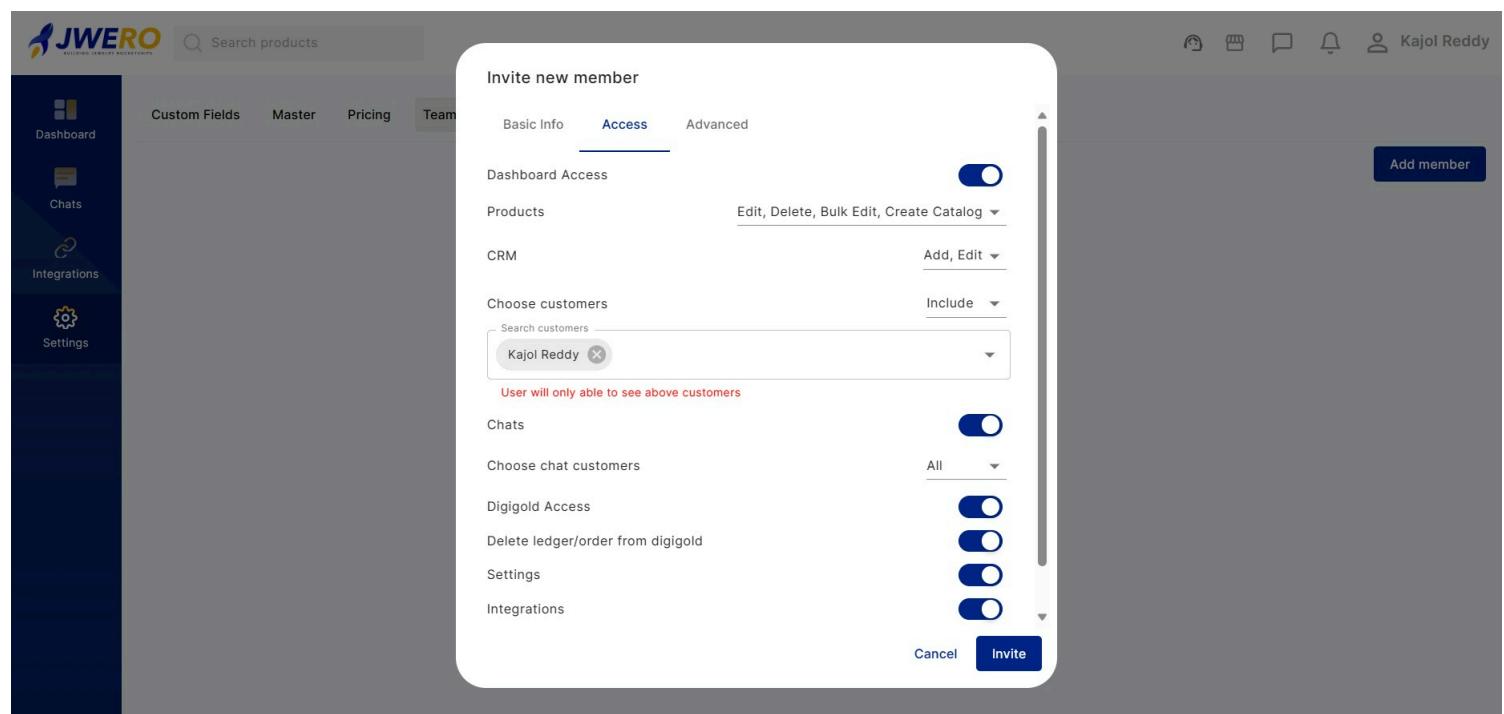
⚡ ⚡ Access Management

With Access Management, you get to decide exactly what parts of the system your team members can use. For example, if someone is only supposed to add products, you can give them access to that part only. Or, if they need to handle customer interactions, you can grant access to CRM or chats.

Admins have full control over these permissions. They can change them anytime. Also, if a team member is given access to CRM or Chats, the admin can choose whether they can see all customer contacts or only specific ones.

⚡ ⚡ To Grant Access:

- For an existing team member Go to Settings > Team Member >> just click on their ID, go to the Access tab, and then add or manage their access.
- You can also set access while adding a new team member.



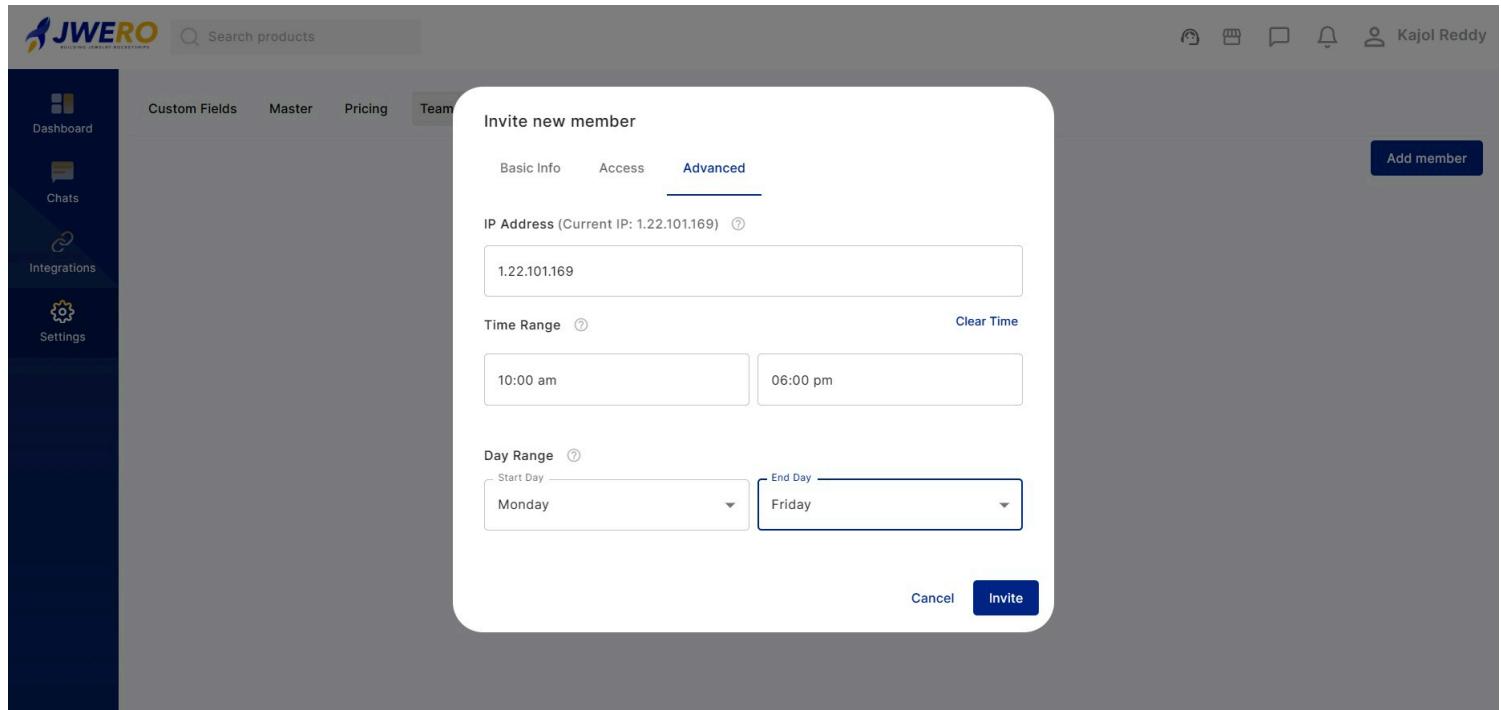
B. User Authentication and Security Measures

“ The admin in charge can decide which IP address team members use to log in.

This helps keep their data safe and ensures that only specific people or locations can access it.

“ Additionally, the admin has the power to choose when access is allowed. They can set specific days and times, making sure that access is only granted during those periods.

This adds an extra layer of security and control over who can use the system and when. It's like having a special key and deciding when the door can be opened.



VII. Frequently Asked Questions (FAQs)

General Team Management

1. How do I add a new team member to the system?

Go to Settings > Team Member >> Add new Team Member >> Add Name + Number + Email >> Manage Access >> Invite.

Copy Invitation Link in Incognito and Create Password for your team member and share.

2. Can I assign different roles to team members based on their responsibilities?

Yes you can assign same access for multiple team members.

3. What happens if a team member forgets their password?

You can reach out to Jwero Live Support or contact care@jwero.ai for assistance.

Access and Permissions

5. How do I restrict access to sensitive information for certain team members?

To make sure only certain team members can see important information, go to the Team Member Access settings. There, you can check and update who has permission to view your dashboard.

6. Can I customize permissions for specific projects or features?

You can control who can do what by using Modules, Actions, IP, Day, and Time settings. This lets you decide exactly who can access specific parts or features.

7. What should I do if a team member needs temporary elevated access for a specific task?

If a team member needs extra access for a short time, you can give it to them in the settings. Once the task is done, remember to turn off the special access to keep things secure. It's like giving someone a temporary key and then taking it back when they're done using it

Troubleshooting

8. I accidentally removed a team member. Can I recover their account?

If a team member is taken off the list, you can add them back and give them access again through the settings.

9. Why can't a new team member access certain features even though they have the required role?

If someone is having trouble accessing something, you can fix it easily.

Just go to settings, click on "Team Members," then select the team member you want to help. Check and update their access, and you're done! It's like adjusting a switch to make sure they can get to what they need.

10. How do I troubleshoot common login issues for team members?

If someone tries the wrong password more than five times, the IP address will be stopped from accessing for 60 minutes. If you need to fix this or change the password, you can contact care@jwero.ai for help.

