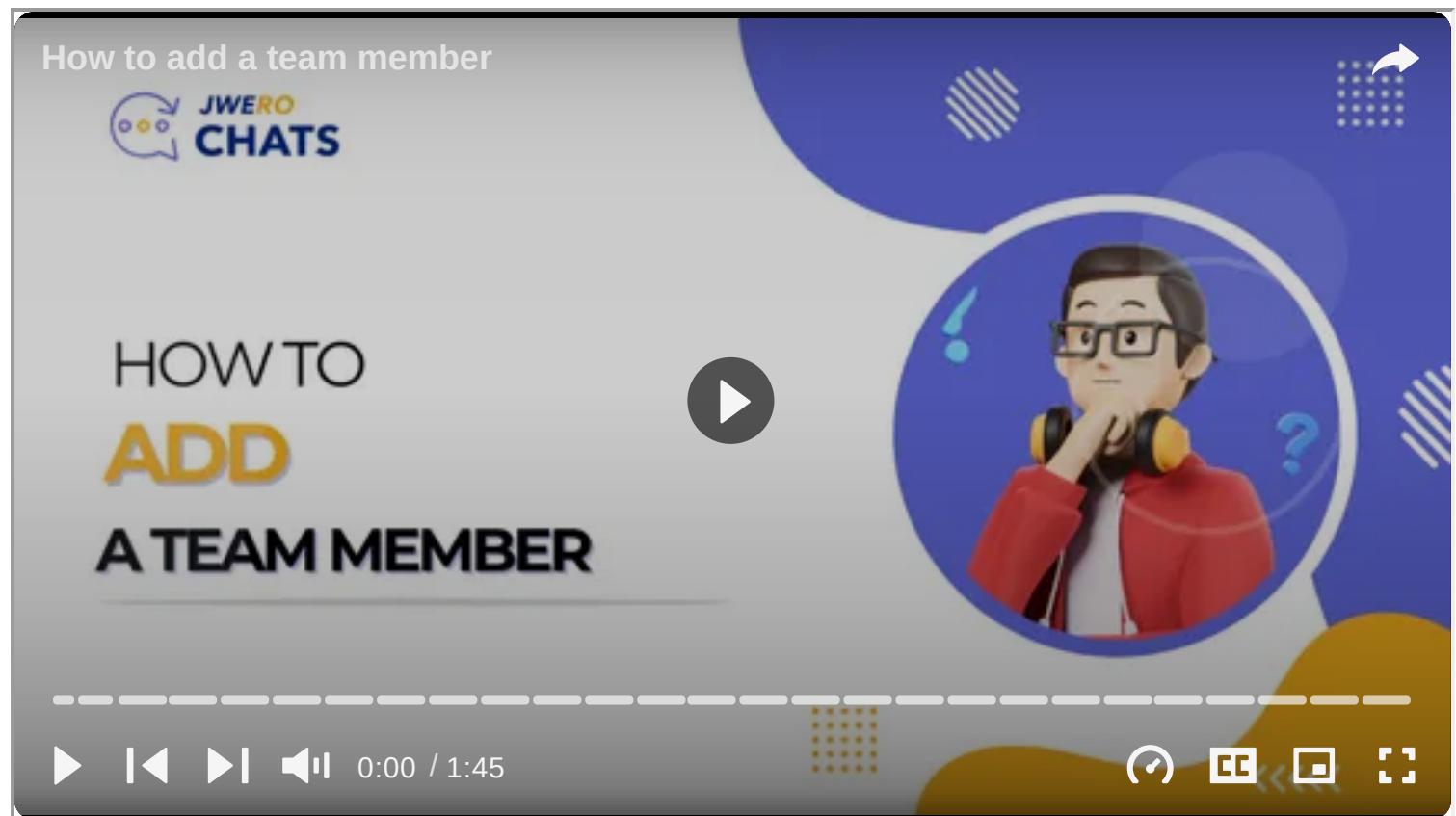


How To Add A Team Member

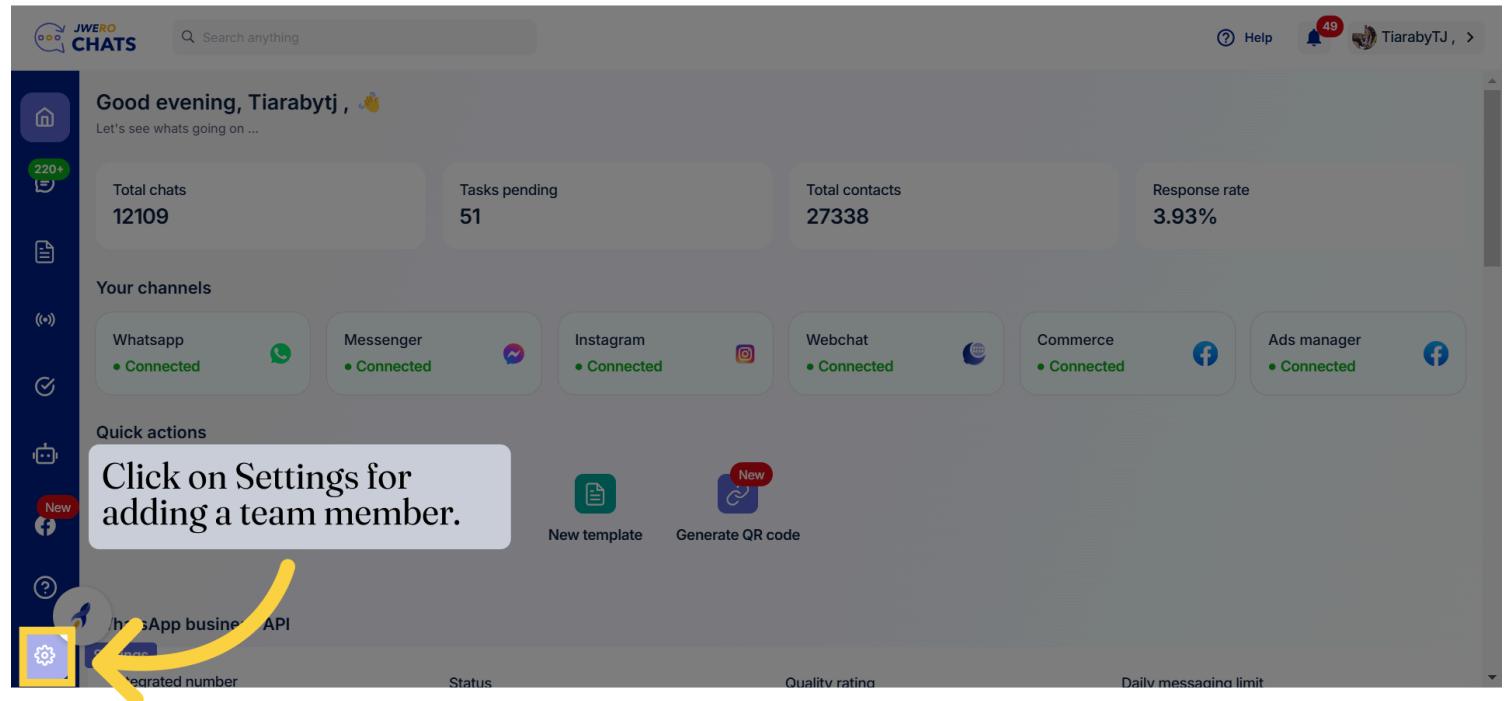


1. Team member

The team member is responsible for managing the tasks and permissions of the contacts assigned to them.



2. Click on Settings for adding a team member.



Good evening, Tiarabytj , 🌟
Let's see what's going on ...

Total chats: 12109 | Tasks pending: 51 | Total contacts: 27338 | Response rate: 3.93%

Your channels:

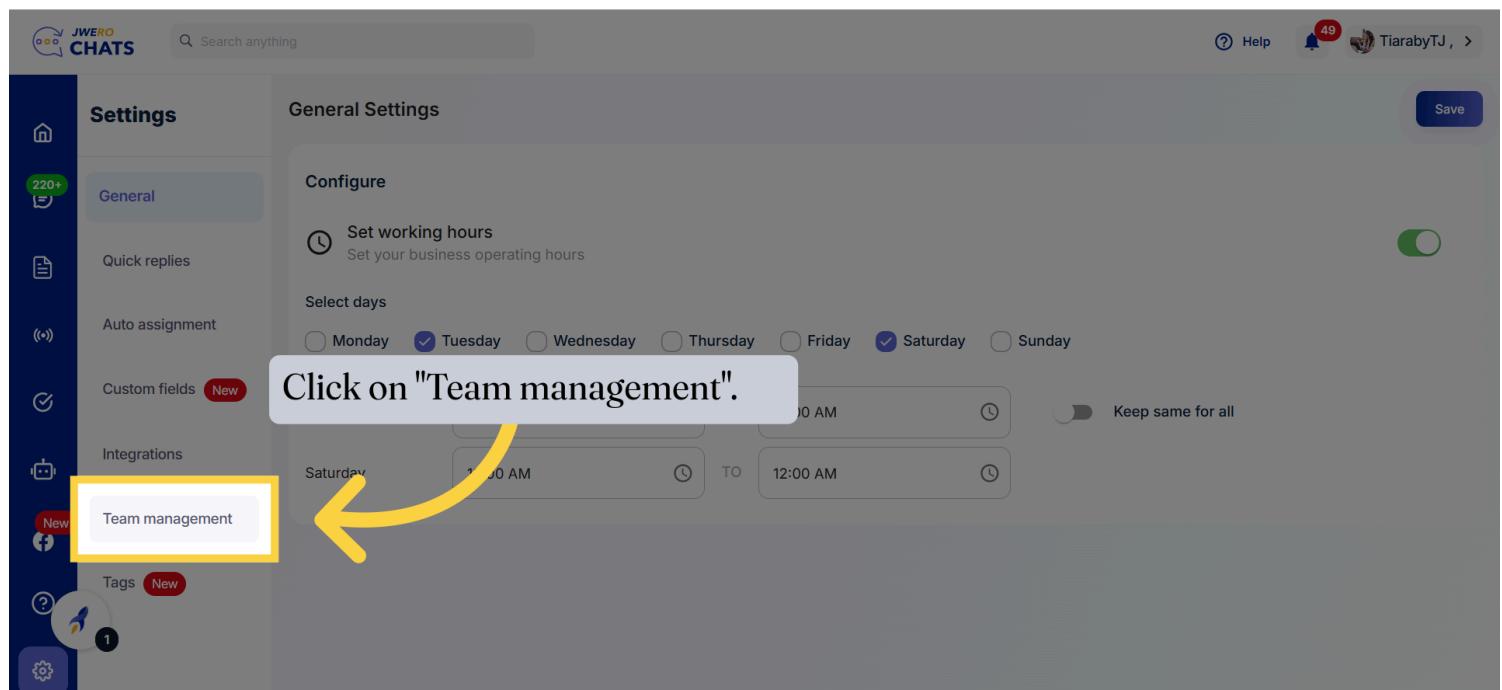
- Whatsapp • Connected
- Messenger • Connected
- Instagram • Connected
- Webchat • Connected
- Commerce • Connected
- Ads manager • Connected

Quick actions:

- New template
- Generate QR code

Click on Settings for adding a team member.

3. Click on "Team management".



4. Click on "Add team member".

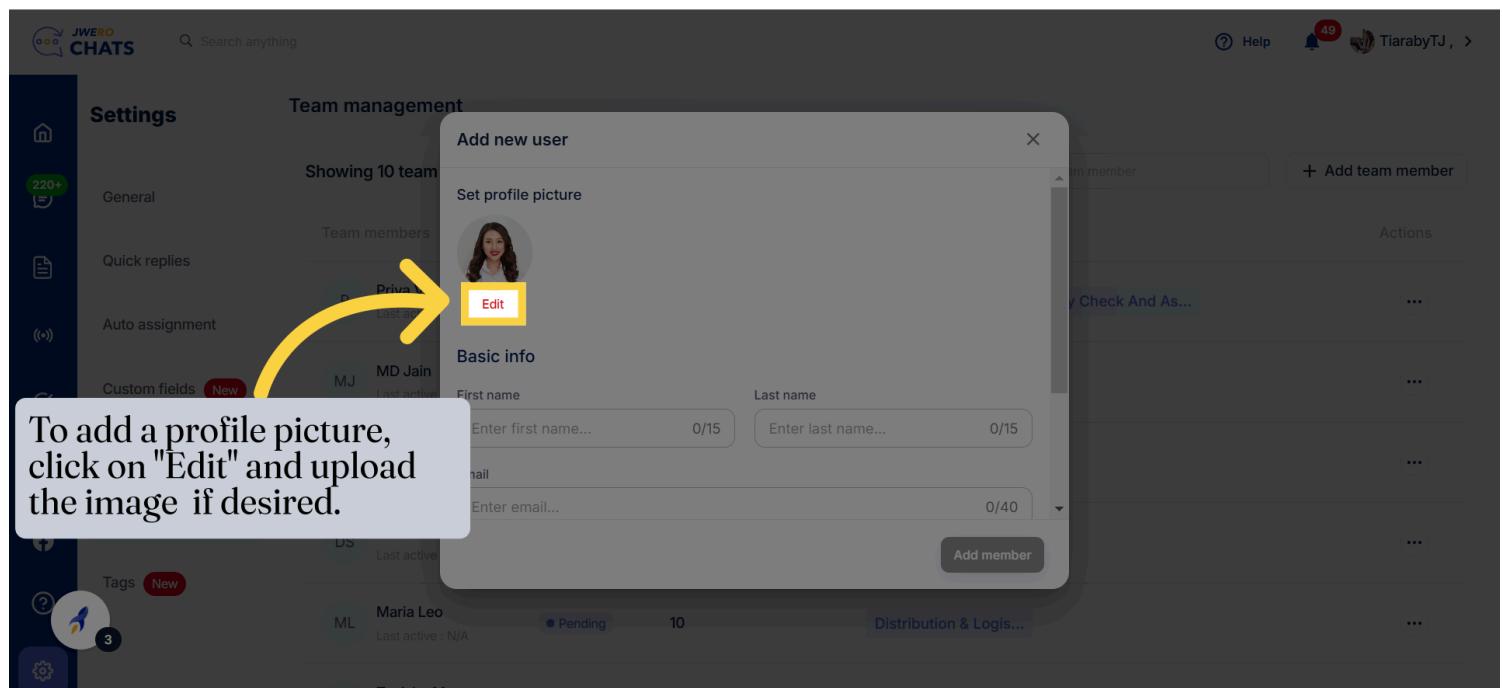
Team management

Showing 10 team members

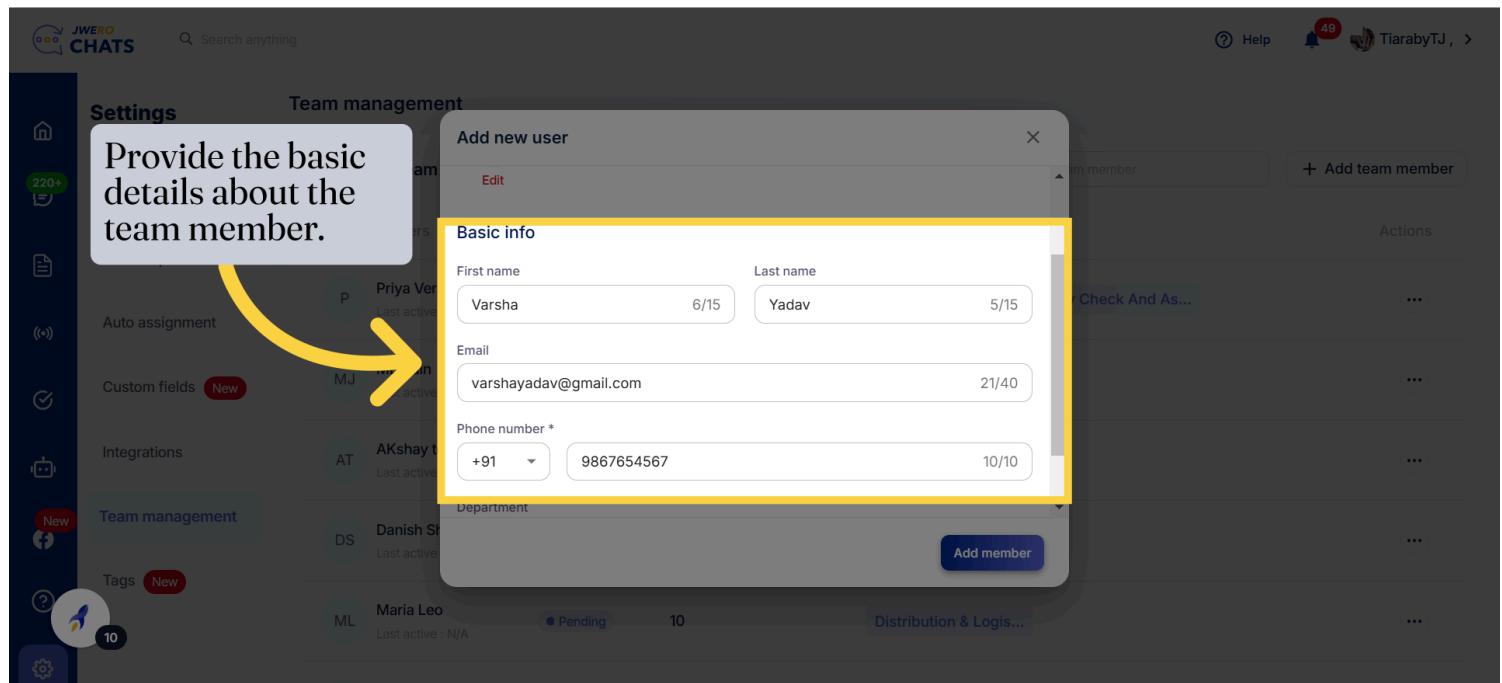
Team members	Status	Contacts assigned	Department	Actions
Priya Verma Last active : N/A	Pending	17986	-	...
MD Jain Last active : N/A	Pending	111	-	...
AKshay test Last active : N/A	Pending	12	Distribution & Logis...	...
Danish Shah Last active : N/A	Pending	9	Distribution & Logis...	...
Maria Leo Last active : N/A	Pending	10	Distribution & Logis...	...

+ Add team member

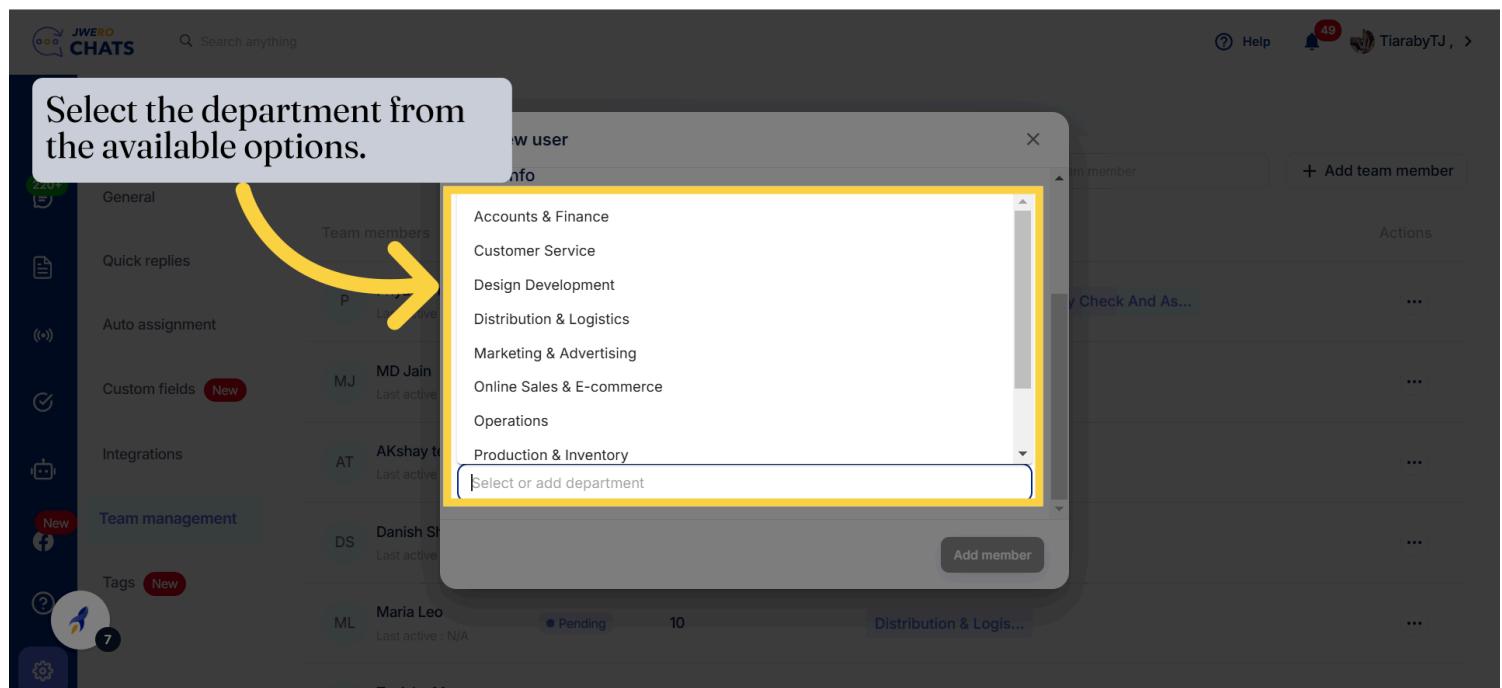
5. To add a profile picture, click on "Edit" and upload the image if desired.



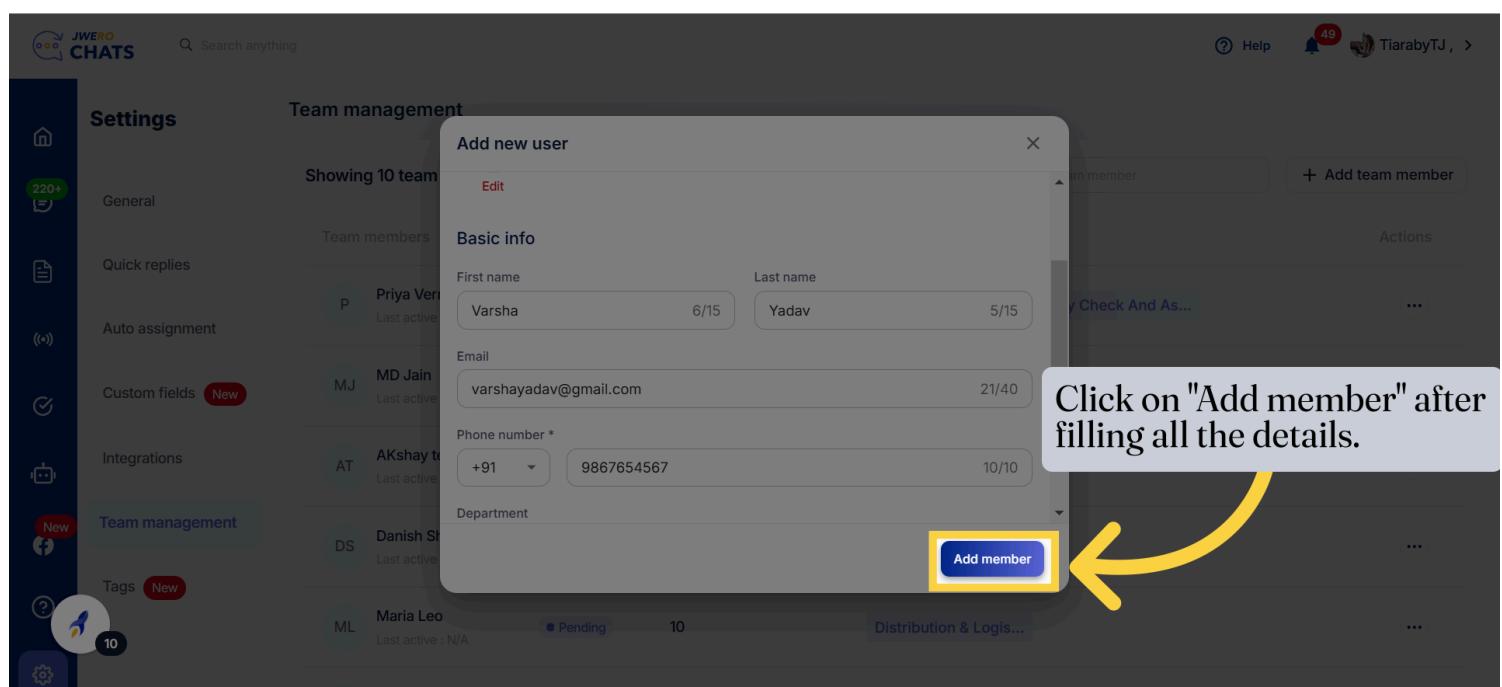
6. Provide the basic information.



7. Select the department from the available options.



8. Click on "Add member"



9. We will have three sections to configure. Let's go through them one by one.

Team management

Varsha Yadav

Access control Info Contacts assigned

Give specific access to your team members

Delete contact

Send broadcast

Send chats

Show contacts data

Export sheet

Import sheet

Create template

10. Select "Access control".

Team management

Varsha Yadav

Access control Info Contacts assigned

Give specific access to your team members

Add new contact

Delete contact

Send broadcast

Send chats

Show contacts data

Export sheet

Import sheet

Create template

11. Manage and control specific access permissions for team members within the Chats module.

Settings

Manage and control specific access permissions for team members within the Chats module.

Chats

	<input type="checkbox"/> Restrict <input checked="" type="checkbox"/> Allow
Add new contact	<input checked="" type="checkbox"/>
Delete contact	<input type="checkbox"/>
Send broadcast	<input checked="" type="checkbox"/>
Send chats	<input checked="" type="checkbox"/>
Show contacts data	<input type="checkbox"/>
Export sheet	<input type="checkbox"/>
Import sheet	<input type="checkbox"/>
Create template	<input type="checkbox"/>
Edit template	<input type="checkbox"/>
Delete template	<input type="checkbox"/>

Tasks

	<input type="checkbox"/> Restrict <input checked="" type="checkbox"/> Allow
Create new task	<input type="checkbox"/>
Edit task	<input type="checkbox"/>
Delete task	<input type="checkbox"/>

12. Manage and control specific access permissions for team members within the Tasks module.

Settings

Manage and control specific access permissions for team members within the Tasks module.

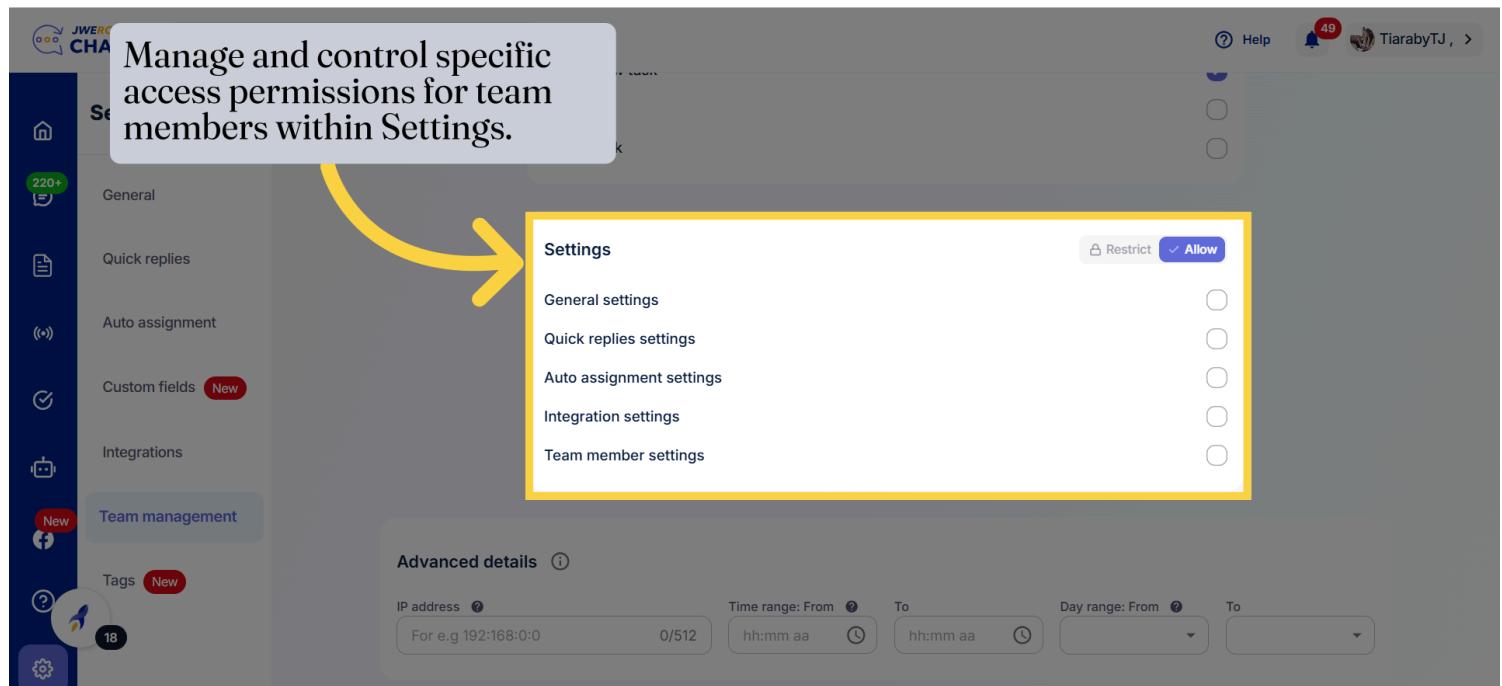
Tasks

	<input type="checkbox"/> Restrict <input checked="" type="checkbox"/> Allow
Create new task	<input type="checkbox"/>
Edit task	<input type="checkbox"/>
Delete task	<input type="checkbox"/>

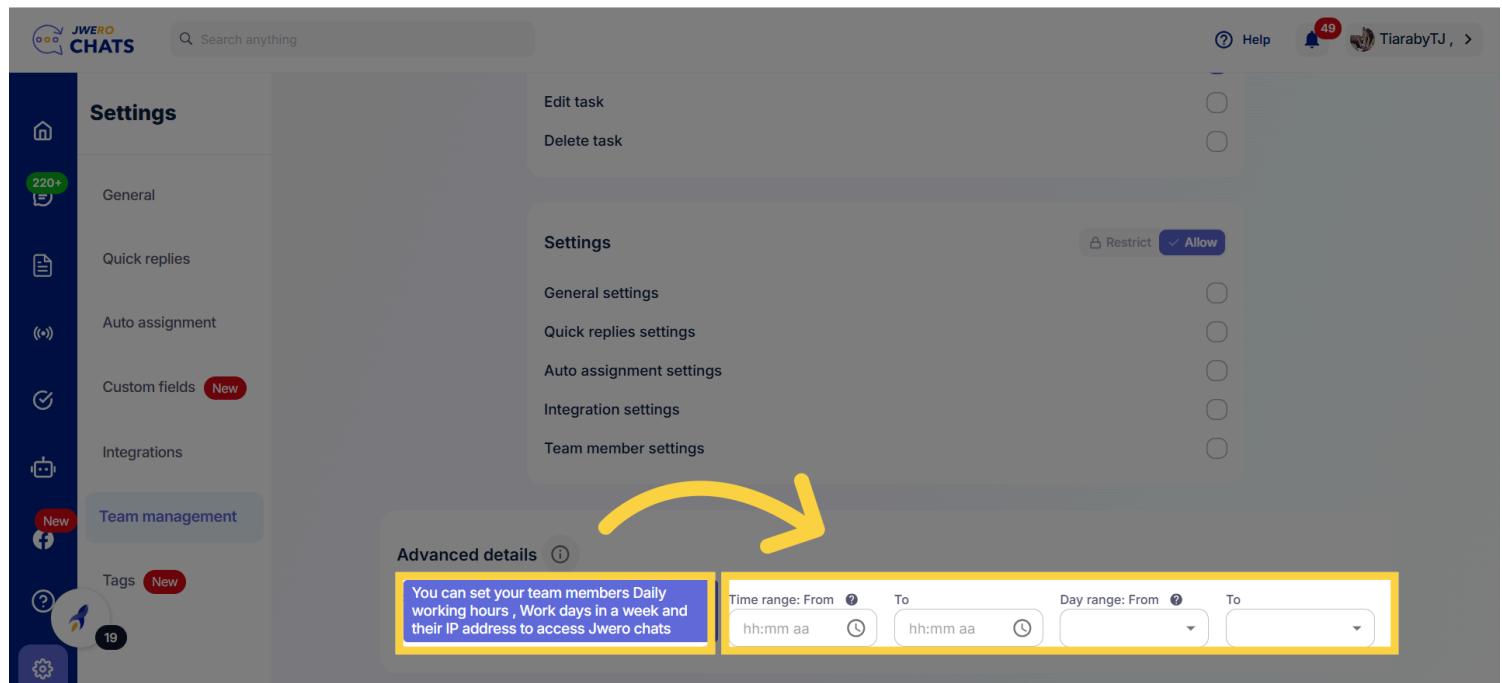
Settings

	<input type="checkbox"/> Restrict <input checked="" type="checkbox"/> Allow
Show contacts data	<input type="checkbox"/>
Export sheet	<input type="checkbox"/>
Import sheet	<input type="checkbox"/>
Create template	<input type="checkbox"/>
Edit template	<input type="checkbox"/>
Delete template	<input type="checkbox"/>

13. Manage and control specific access permissions for team members within Settings.



14. Advanced Details



15. Click on "Update" once you have finished configuring the access control section.

Settings

Team management

VY Varsha Yadav

General

Quick replies

Auto assignment

Custom fields New

Integrations

Team management

Tags New

20

220+

Search anything

Access control Info Contacts assigned

Give specific access to your team members

Chats

Action	Status
Add new contact	<input checked="" type="checkbox"/>
Delete contact	<input type="checkbox"/>
Send broadcast	<input checked="" type="checkbox"/>
Send chats	<input checked="" type="checkbox"/>
Show contacts data	<input type="checkbox"/>
Export sheet	<input type="checkbox"/>
Import sheet	<input type="checkbox"/>

49 Help TiarabyTJ , >

Click on "Update" once you have finished configuring the access control section.

16. Let's move to Info section, click on "Info".

Settings

Team management

VY Varsha Yadav

General

Quick replies

Auto assignment

Custom fields New

Integrations

Team management

Tags New

21

220+

Search anything

Access control **Info** Contacts assigned

Give specific access to your team members

Add new contact

Delete contact

Send broadcast

Send chats

Show contacts data

Export sheet

Import sheet

Restrict Allow

49 Help TiarabyTJ , >

Let's move to Info section, click on "Info".

17. Provide more details of the team member if desired.

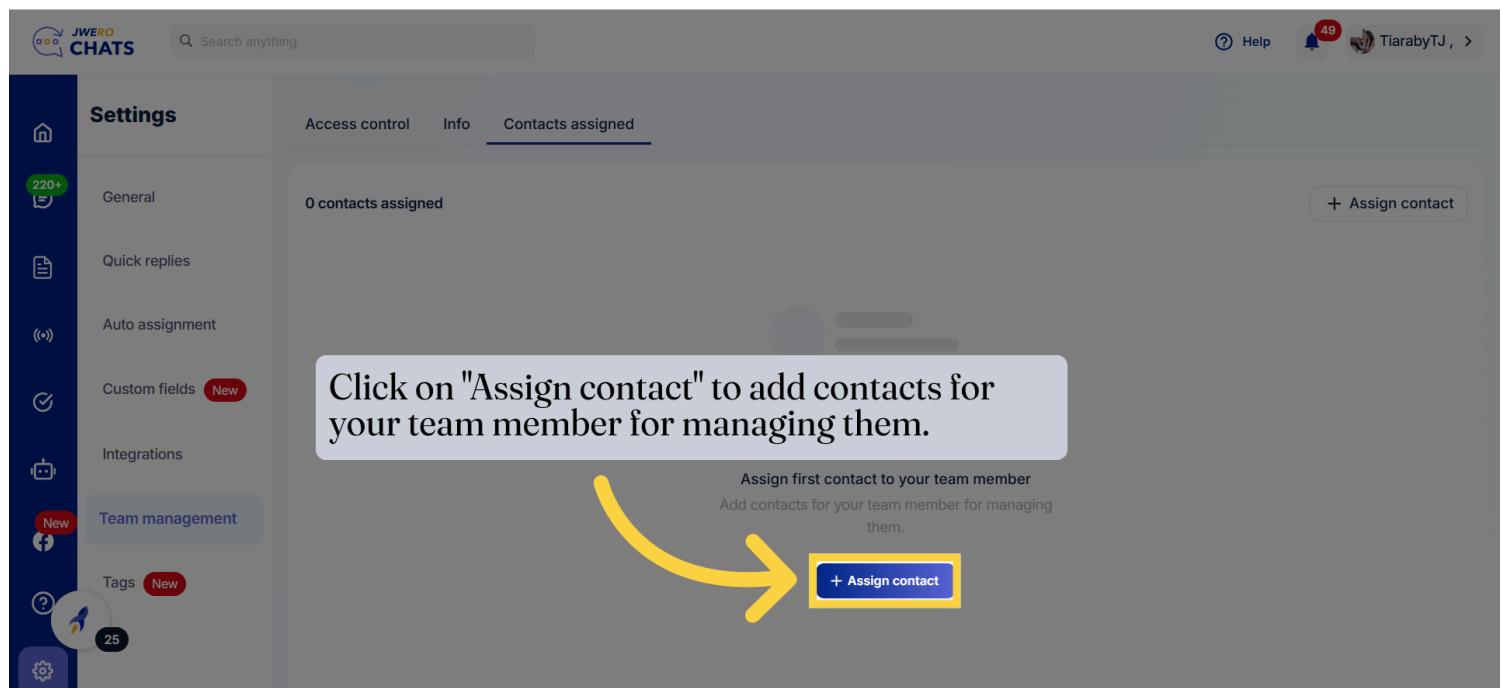
Provide more details of the team member if desired.

The screenshot shows the 'Team management' section for a team member named Varsha Yadav. The 'More details' section is highlighted with a yellow border. Inside this section, there are fields for Phone number (Alternate), Address line 1, City, Alternate email, Address line 2, State, Date of birth, and Pincode. The 'More details' section is labeled 'More details' and has a sub-section header 'Basic info'.

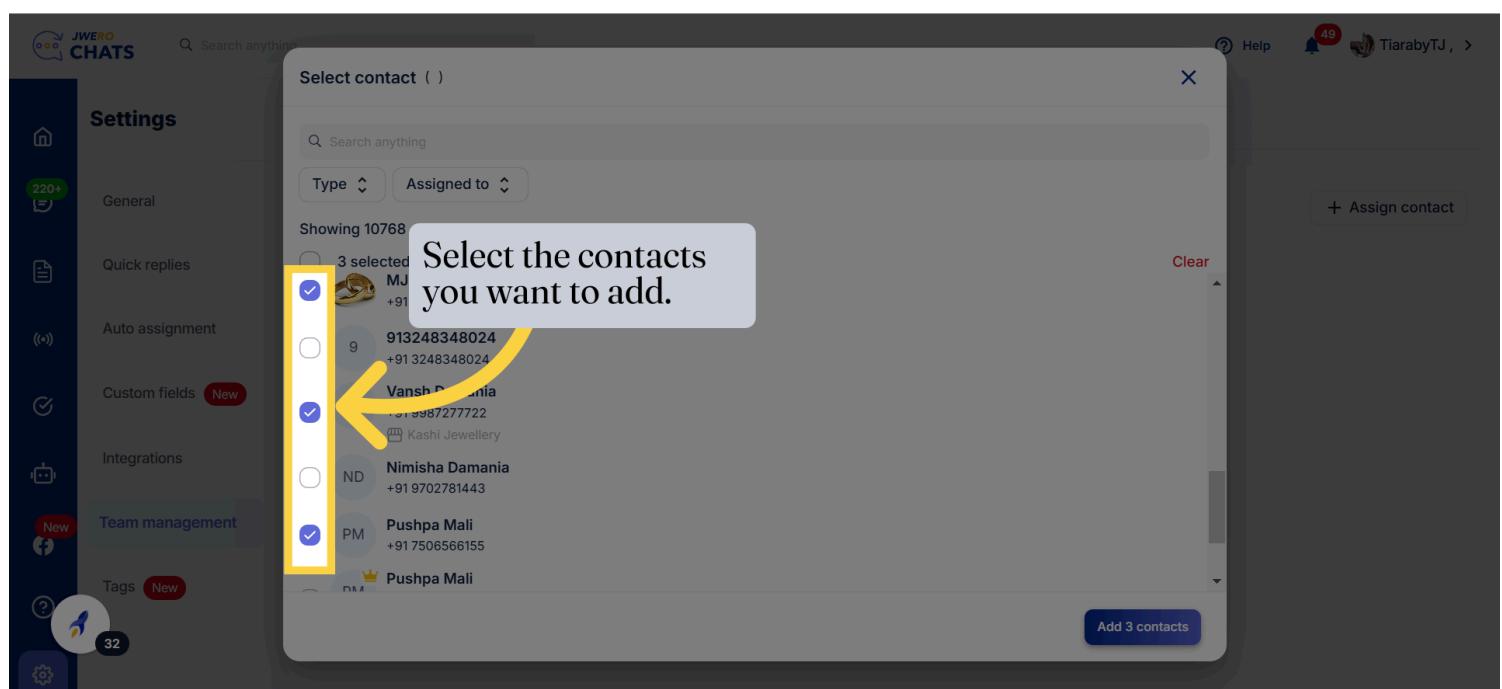
18. Let's move to "Contacts assigned" section.

The screenshot shows the 'Team management' section for a team member named Varsha Yadav. The 'Info' tab is selected, and the 'Contacts assigned' tab is highlighted with a yellow box. A callout bubble says 'Let's move to "Contacts assigned" section.' The 'Basic info' section contains fields for First name, Last name, Email, Phone number, Employee id, Gender, Department, and More details.

19. Click on "Assign contact" to add contacts for your team member for managing them.



20. Select the contacts you want to add.



21. You will see this notification after successfully adding the contacts.

Search anything

Team management

VY Varsha Yadav

Settings

General

Quick replies

Auto assignment

Custom fields New

Integrations

Team management New

Tags New

220+ 34

Access control Info Contact

0 contacts assigned

Name Channel Type Email Phone Location Actions

MJ Jain Lead - 9464626007

VD Vansh Damania Lead - 919987277722

PM Pushpa Mali Lead - 917506566155

You will see this notification after successfully adding the contacts.

Contacts assigned successfully
3 contacts assigned successfully.

+ Assign contact

22. After successfully adding the contact, it will appear under the "Contacts assigned" section.

Search anything

Team management

VY Varsha Yadav

Settings

General

Quick replies

Auto assignment

Custom fields New

Integrations

Team management New

Tags New

35

Assigned

Name Channel Type Email Phone Location Actions

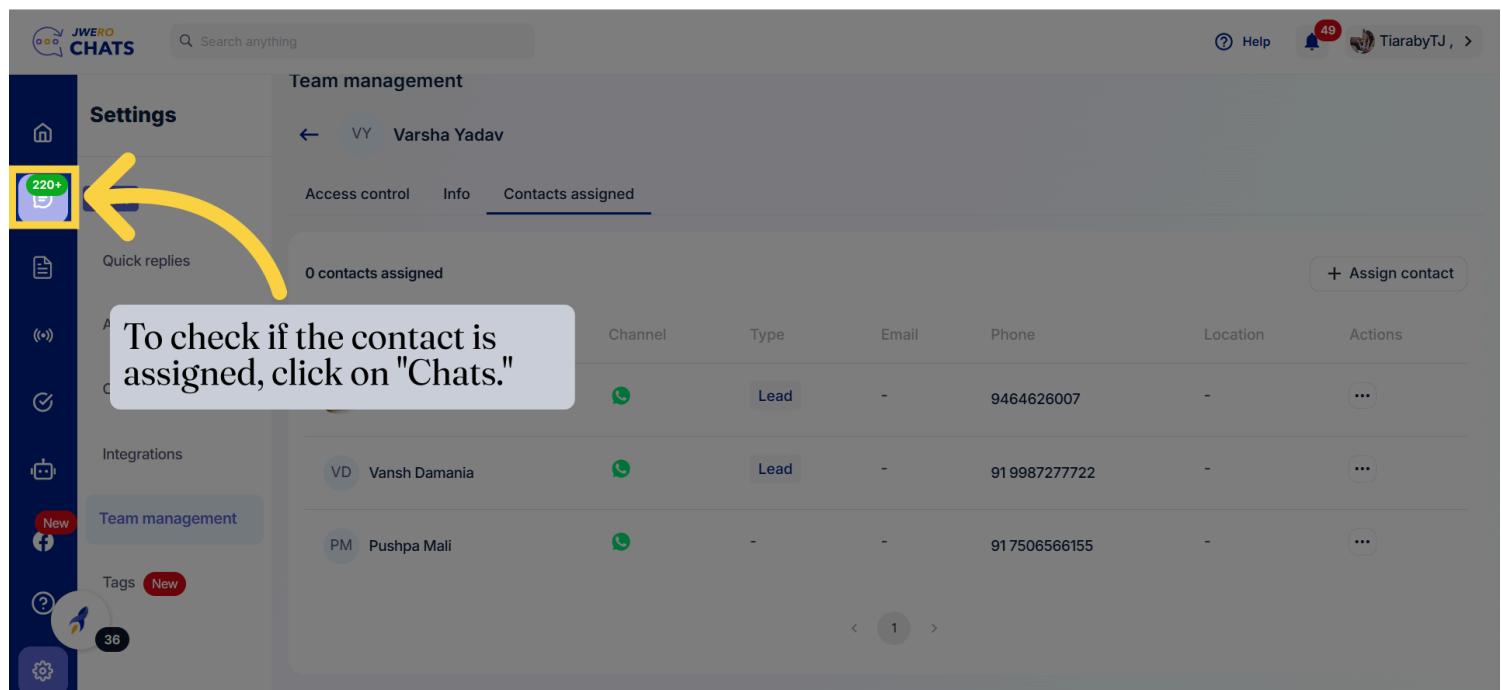
MJ Jain Lead - 9464626007

VD Vansh Damania Lead - 919987277722

PM Pushpa Mali Lead - 917506566155

+ Assign contact

23. To check if the contact is assigned, click on "Chats."



JWERO CHATS

Search anything

Help 49 TiarabyTJ , >

Settings

Team management

VY Varsha Yadav

Access control Info Contacts assigned

Quick replies

0 contacts assigned + Assign contact

Chats

Integrations

Team management

Tags New

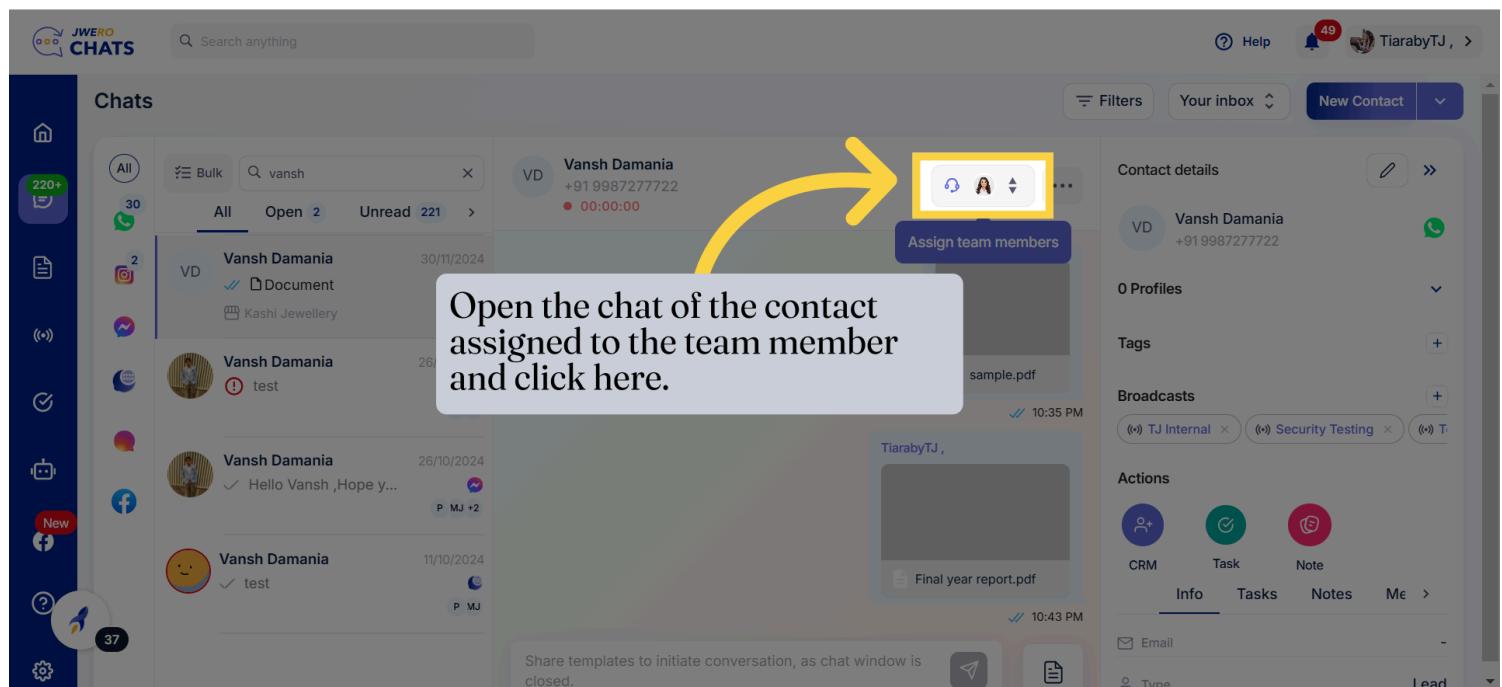
36

220+

Channel Type Email Phone Location Actions

Channel	Type	Email	Phone	Location	Actions
Lead	-	9464626007	-	-	...
Lead	-	919987277722	-	-	...
Lead	-	917506566155	-	-	...

24. Open the chat of the contact assigned to the team member and click here.



JWERO CHATS

Search anything

Help 49 TiarabyTJ , >

Chats

All Bulk vansk

30 2 Unread 221 >

All Open 2

VD Vansh Damania +919987277722 00:00:00

Assign team members

30/11/2024

Open the chat of the contact assigned to the team member and click here.

26/10/2024

26/10/2024

11/10/2024

Contact details

VD Vansh Damania +919987277722

0 Profiles

Tags

Broadcasts

TJ Internal Security Testing

Actions

CRM Task Note

Info Tasks Notes Me >

Email Type

Share templates to initiate conversation, as chat window is closed.

25. From the list of team members, the contact will be checked for the members its assigned to.

JWERO CHATS

Search anything

Help 49 TiarabyTJ , >

Chats

All 220+ 30 2 221 > VD Vansh Damania +919987277722 00:00:00 Contact details

All Open Unread > VD Vansh Damania 30/11/2024 Document Kashi Jewellery VY

From the list of team members, the contact will be checked for the members its assigned to.

Assigned to (16)
1 member selected
Rishi Das IT RD 9 | Last active : N/A
Rahul Patil Accounts &... R 10 | Last active : N/A
Rex Sharma Design Dev... RS 1 | Last active : N/A
Varsha Yadav Accounts &... VY 0 | Last active : N/A

Confirm