

Auto Assign Contacts to Team Members (Desktop)

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When jewelers have multiple team members, newly added contacts or customers who message for the first time will be visible to the admin by default. These chats/contacts will not be visible to team members unless they are set to be auto-assigned. This way, the admin does not need to manually assign contacts/chats to team members. Instead, the admin can designate one manager to whom the chats will be automatically assigned and transferred immediately.

How to Set Up Auto Assign:

1. Navigate to <https://chats.jwero.ai/settings/auto-assignment>
2. Enable the team member to whom the auto-assign feature should be applied.
3. Save the settings.

