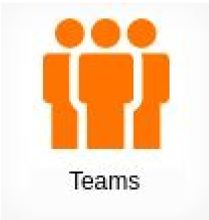
# Teams




*All customer representatives can be gathered under different teams in the system. Customer representatives on the same team can follow one another and send messages to the supervisor of the team. Supervisors can take reports based on the team and send collective messages to users added to the team.*

## Creating a Team

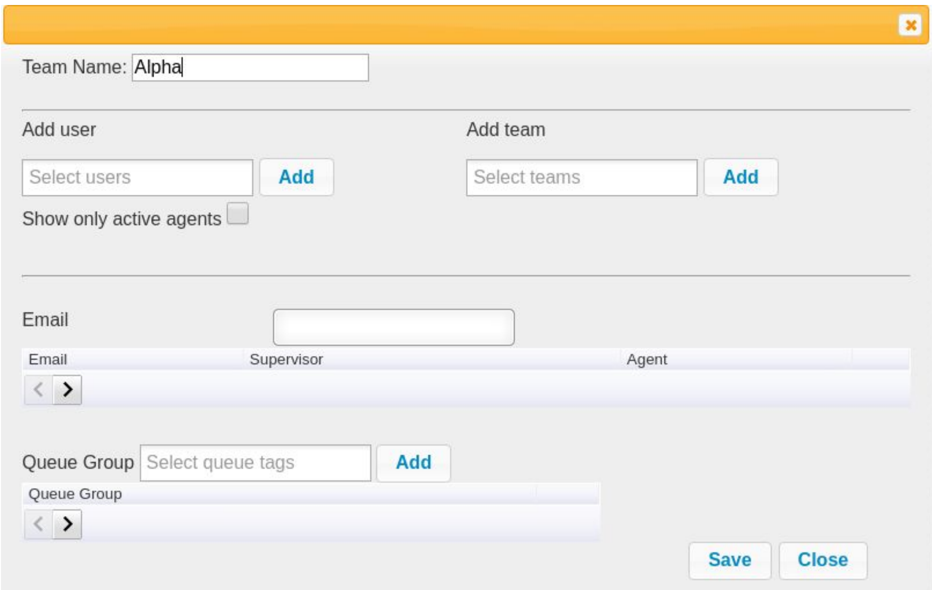
In the input box (in the top left corner of the "Teams module" shown below:


1. Type the name of the team; you wish to create (Ex. Alpha)

2. Press the Create button, 

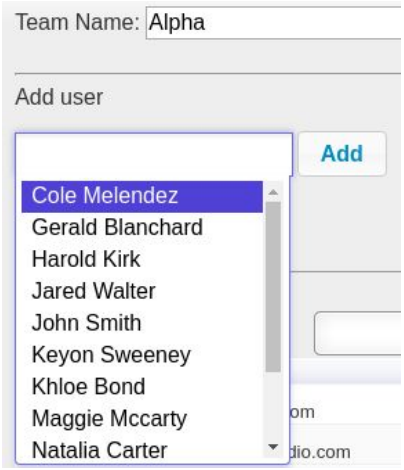
.

*Once the Create button is clicked, a pop-up window will appear as shown below:*

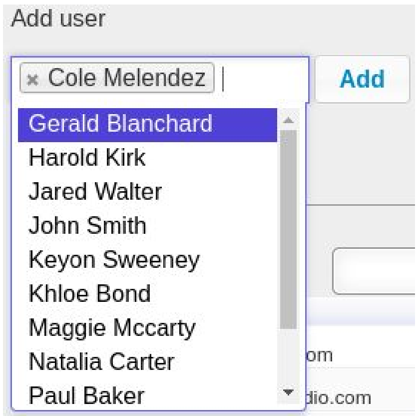



*The pop-up window appears for the team name, "Alpha."*

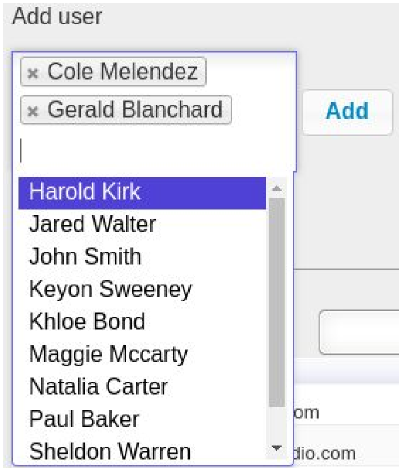
3. Add users to the team by clicking the "Select users" input box, a dropdown list of available users will appear, as shown below:




4. Click the desired user, "Cole Melendez," from the dropdown list, if down correctly the selection will look like the picture below:

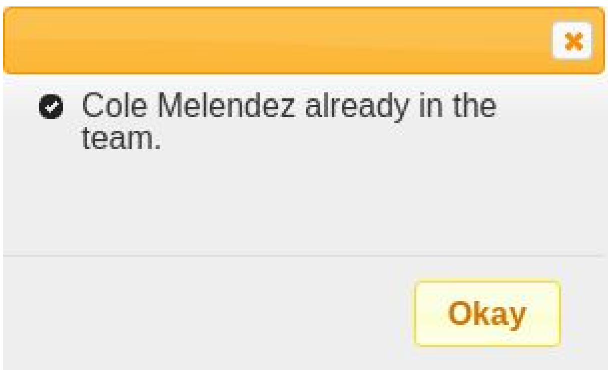


*Note: To facilitate speed in adding users, multiple users can be selected, for example, "Gerald Blanchard," can be selected as shown below:*




*Both of the desired users that were clicked are added to the input box, if a user was clicked by accident the user can be deleted by pressing the, "X," to the left of the user's name:*


5. To add the user ("Cole Melendez") to the team, press the add button, , if done correctly the following pop-up window will be displayed:

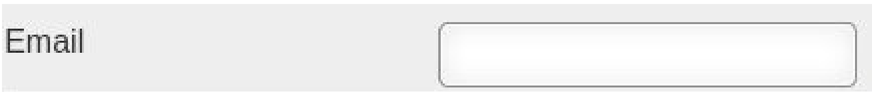


6. Click the Okay button, 

, once the user is added, the user will be listed as shown below:

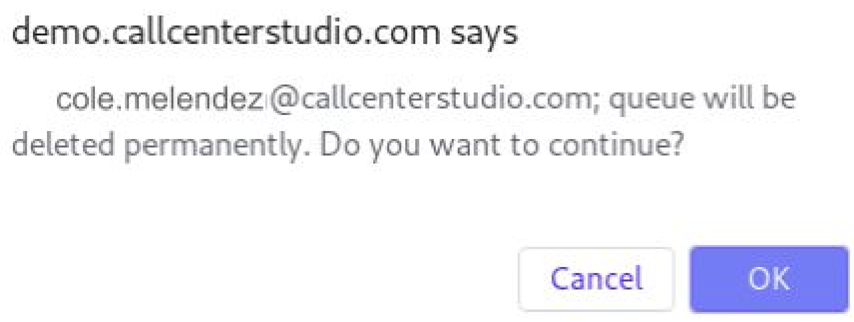

*Note: The access level is also listed. In this example, Cole Melendez is both a Supervisor and an Agent indicated by the checkmarks.*

*To facilitate ease in searching for team members, the input box to the right of Email can be used to find team members quickly, as shown below:*



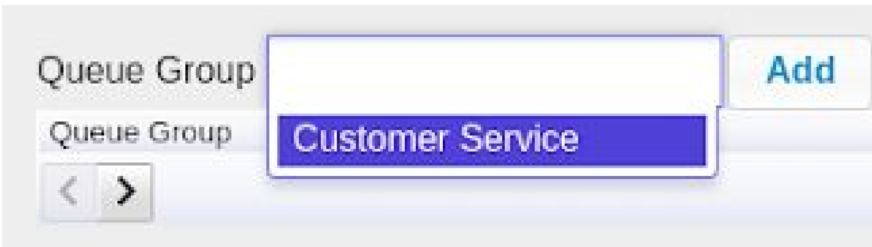

*Using this input box, type the user's email to find them within the Team member list easily. Shown below:*

*Team members can be deleted here as well by pressing,* x*, to the right of checkmarks. If the,* x*, is clicked the pop-up below will be shown to confirm the deletion:*




- *Selecting the cancel button,* Cancel*, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

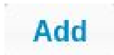
7. Once users are added, the team can be added to a queue. Add a team to a queue clicking the "Select queue tags" input box, a dropdown list of available queues will appear, as shown below:



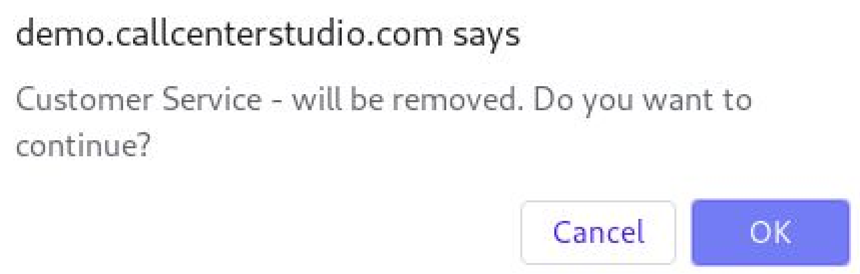
8. Click the desired queue, "Customer Service," from the dropdown list, if down correctly the selection will look like the picture below:


*Note:*

- *To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.*
- *Selected queues can also be deleted similar to users by clicking the, "X", to the left of the queue name.*

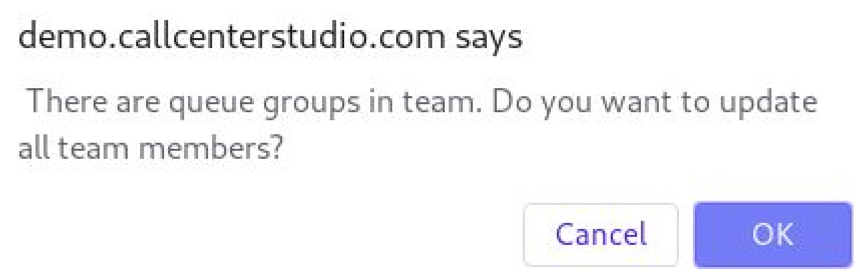
9. To add the queue ("Customer Service") to the team, press the add button, , if done correctly the queue will be displayed under the "Queue Group" list as shown below:

*Queues can be deleted here as well by pressing, x, to the right of the queue name. If the, x, is clicked the pop-up below will be shown to confirm the deletion:*




- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

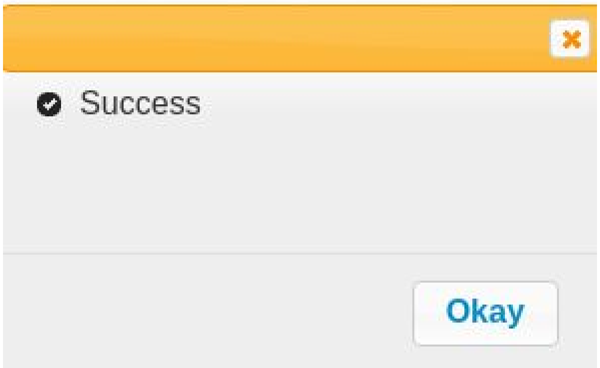
10. Once the user and queue selection is complete, the information can be saved by clicking the save button, Save, the following pop-up box will appear:



11. Click the Ok button, 

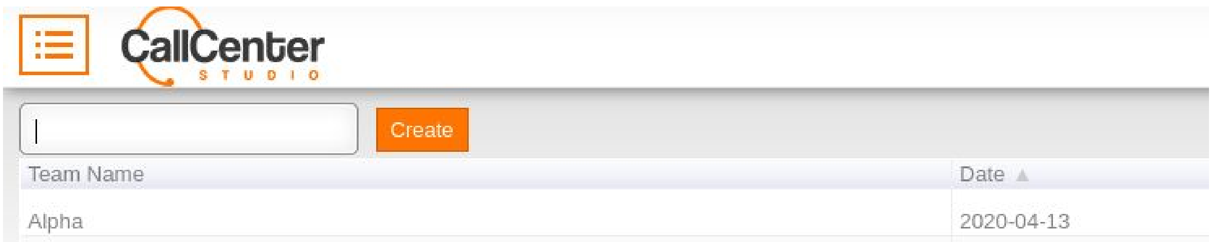
, to confirm the update.

*After pressing the Ok button, the following pop-up window will be displayed to acknowledge the addition of the team:*



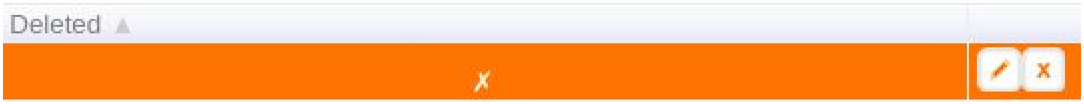

12. Click the Okay button, 

, the new team will be added to the Team Name list as shown below:

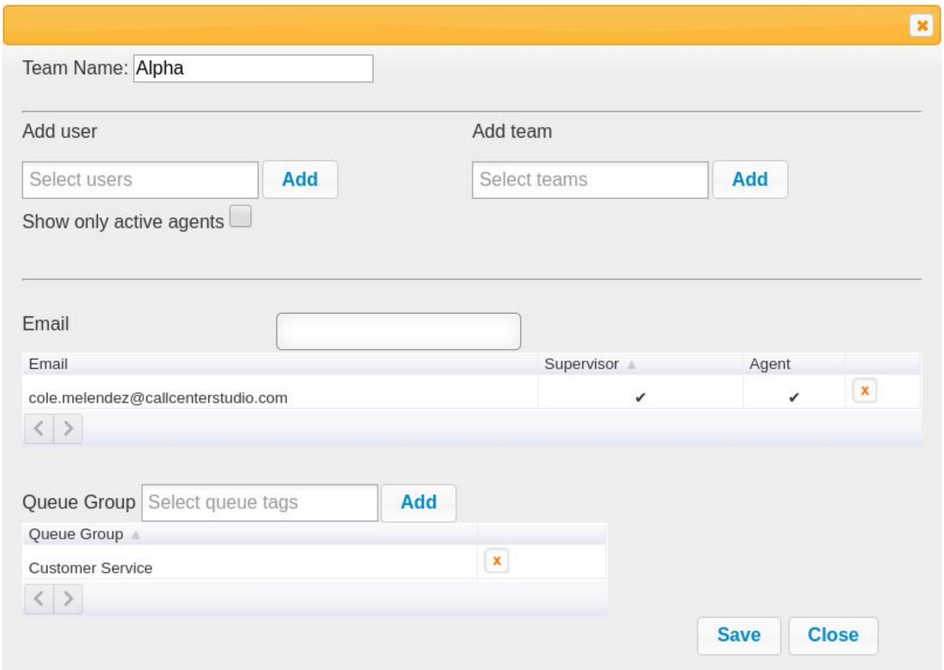


# Editing a Team

1. To edit a team, click the edit button, , located on the far right of the Team Name after the "Deleted Column" as shown below:



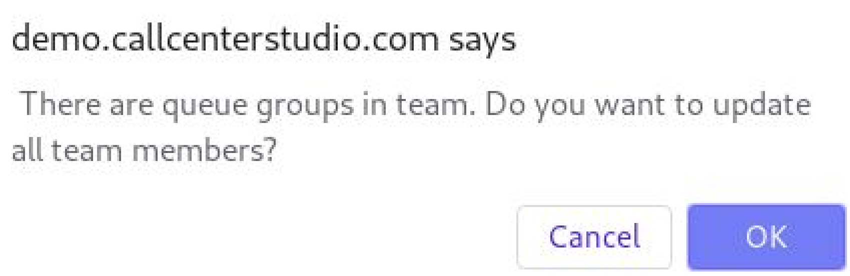

*After clicking the edit button, the team pop-up window will appear as shown:*




*All edits can be made using this pop-up window, such as adding and changing users and teams.*

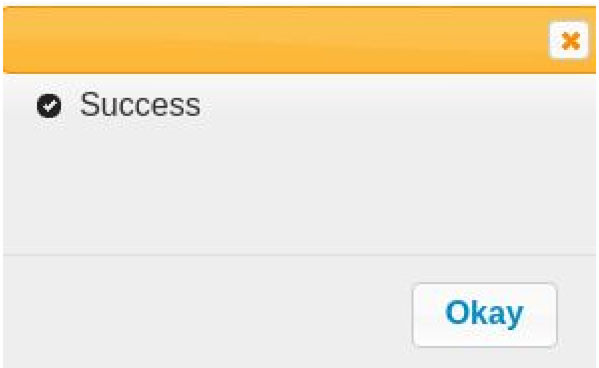
2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, Save, the following pop-up box will appear:




4. Click the Ok button, OK, to confirm the update.

*After pressing the Ok button, the following pop-up window will be displayed to acknowledge the changes to the team:*

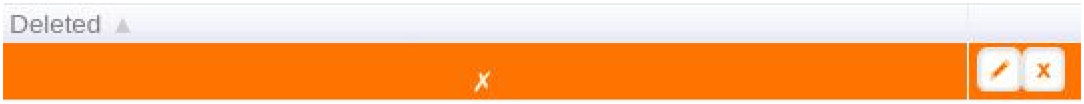



5. Click the Okay button, Okay, to confirm the changes.

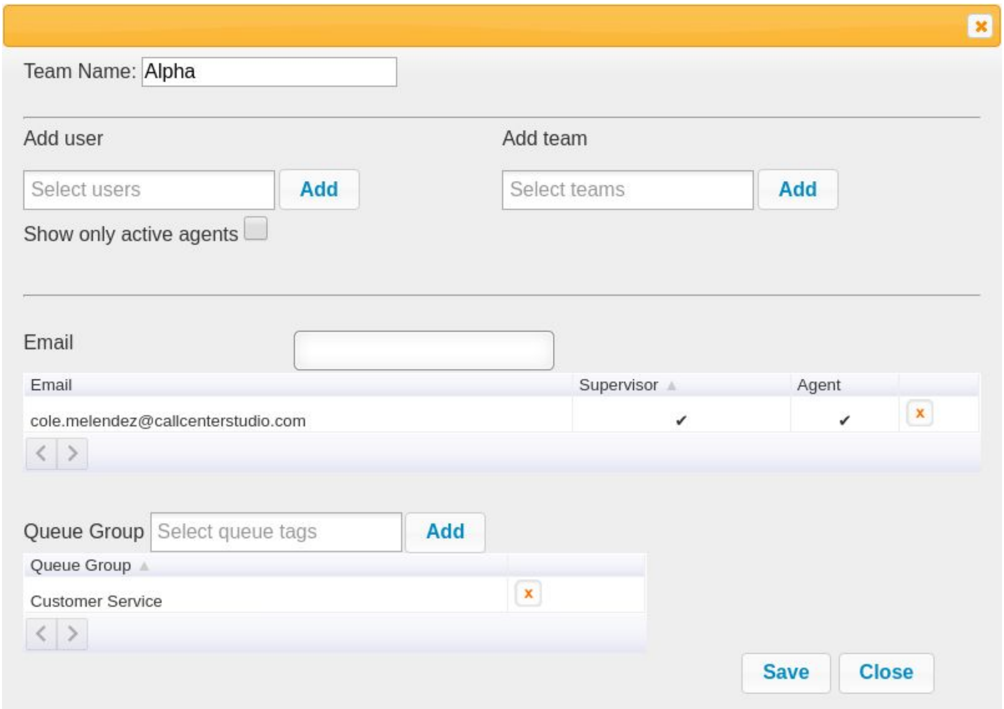
## Adding another Team to an Existing Team

*Team members from an existing team can be added to another team using the process outlined below:*

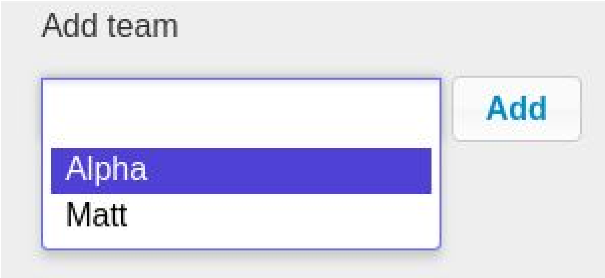
1. Click the edit button, , located on the far right of the Team Name after the "Deleted Column" as shown below:



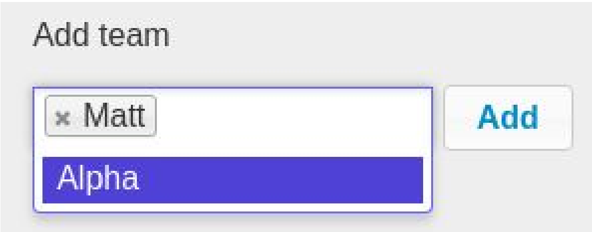

*After clicking the edit button, the team pop-up window will appear as shown:*



2. Within the team, another team can be added. Add a team to an existing team by clicking the "Select teams" input box, a dropdown list of available teams will appear, as shown below:




3. Click the desired team, "Matt," from the dropdown list, if down correctly the selection will look like the picture below:

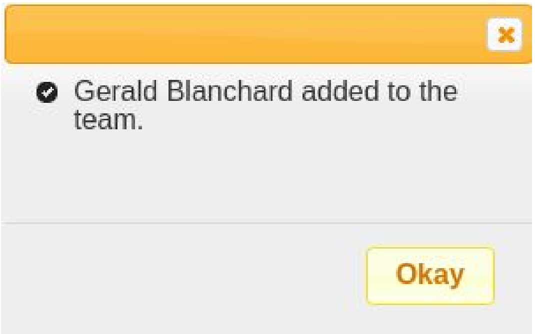



*Note:*

- *To facilitate speed in adding teams, multiple teams, if created, can also be selected, and added at the same time.*
- *Selected teams can also be deleted, similar to users, by clicking the, "X", to the left of the team name.*

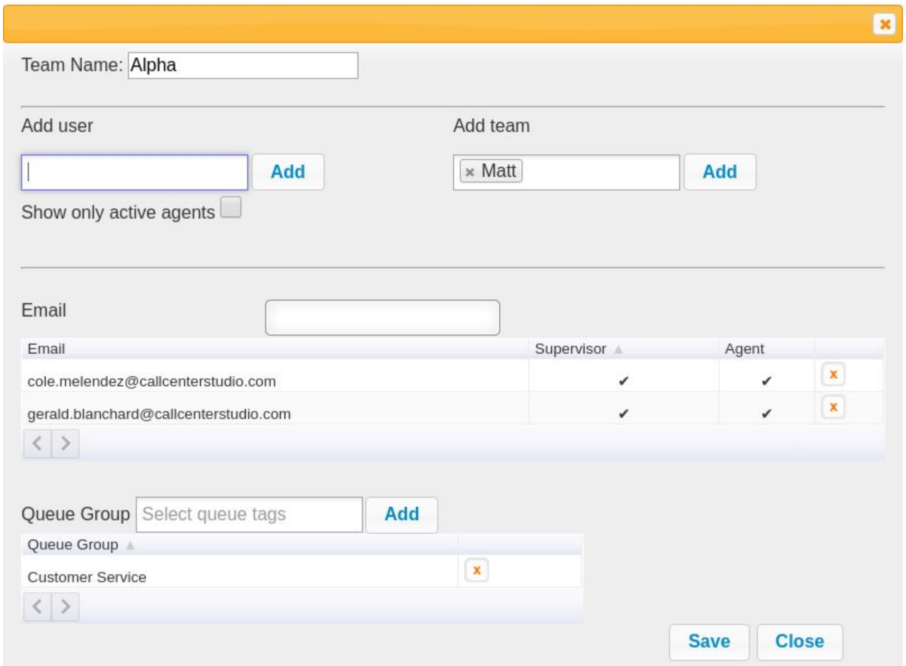
4. To add the team ("Matt") to the team, press the add button, 

, if done correctly, the team members will be displayed in a pop-up confirmation window as shown below:



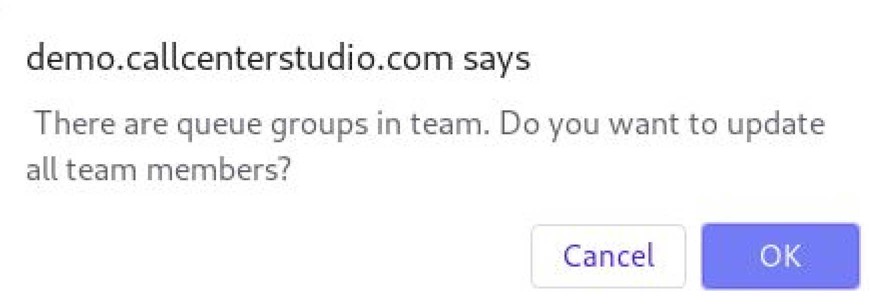

5. Click the Okay button, 

, to confirm the changes. The team members from the added team, "Matt," will be displayed with the team members from "Alpha," as shown below:



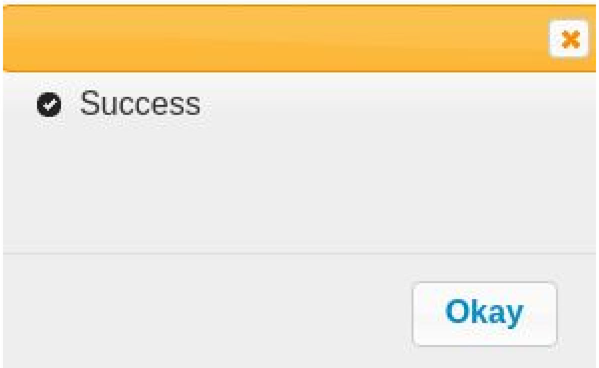

*As seen above, gerald.blanchard@callcenterstudio.com (from team "Matt") was added to team Alpha's member list.*

6. Once the desired changes have been completed, the information can be saved by clicking the save button, Save , the following pop-up box will appear:




7. Click the Ok button, OK, to confirm the update.

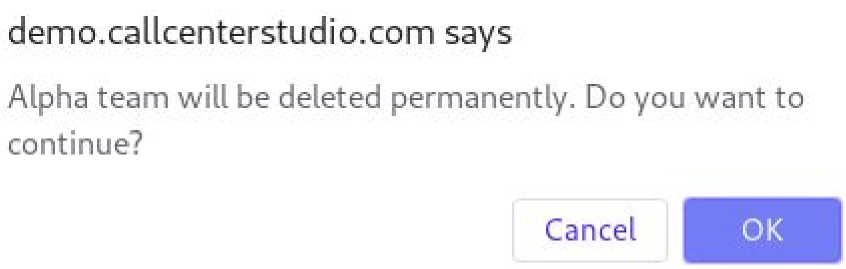
*After pressing the Ok button, the following pop-up window will be displayed to acknowledge the changes to the team:*




8. Click the Okay button, Okay , to confirm the changes.

## Deleting a Team

1. From the Team Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:




- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

*The screen will reload, and the deleted team will not be shown.*