


## **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

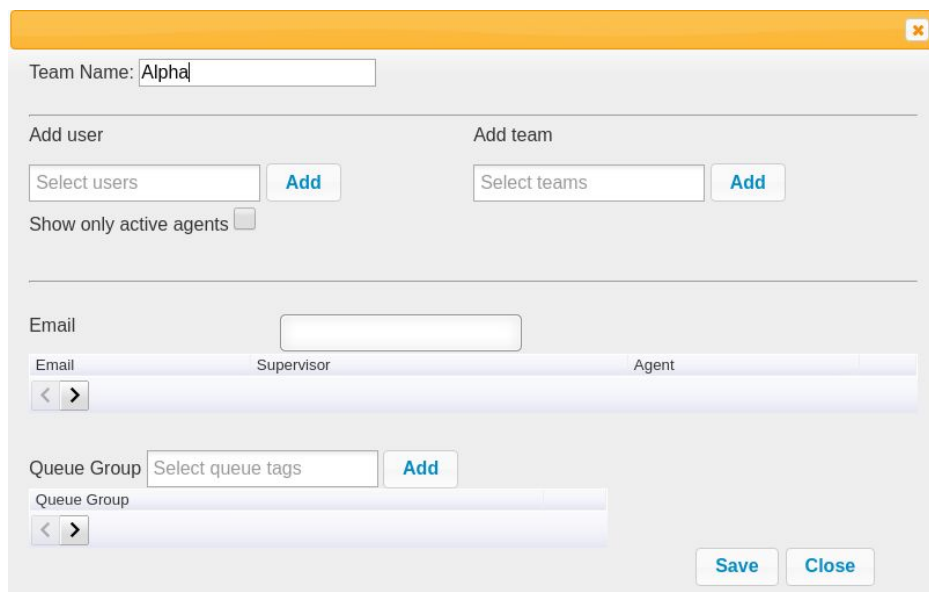
In the input box (in the top left corner of the “Teams module” shown below:



A screenshot of the Teams module interface showing a text input box with a vertical cursor and an orange 'Create' button to its right.

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:*

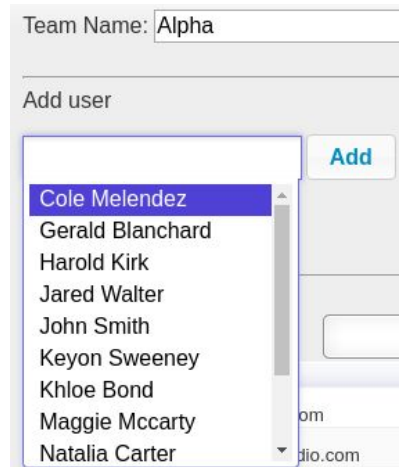


A screenshot of a pop-up window for creating a team. The window has a yellow title bar with a close button. The main content area includes:

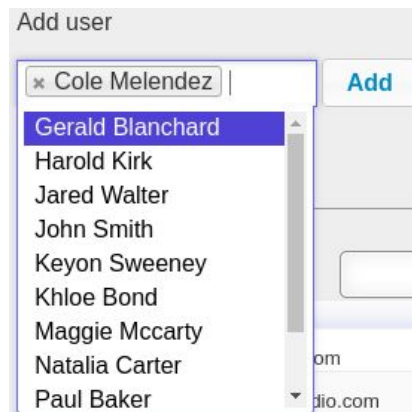
- A 'Team Name' field containing the text 'Alpha'.
- An 'Add user' section with a 'Select users' dropdown and an 'Add' button.
- An 'Add team' section with a 'Select teams' dropdown and an 'Add' button.
- A 'Show only active agents' checkbox.
- An 'Email' field.
- A horizontal bar with 'Email', 'Supervisor', and 'Agent' labels and navigation arrows.
- A 'Queue Group' section with a 'Select queue tags' dropdown and an 'Add' button.
- Another horizontal bar with 'Queue Group' and navigation arrows.
- 'Save' and 'Close' buttons at the bottom right.

*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:

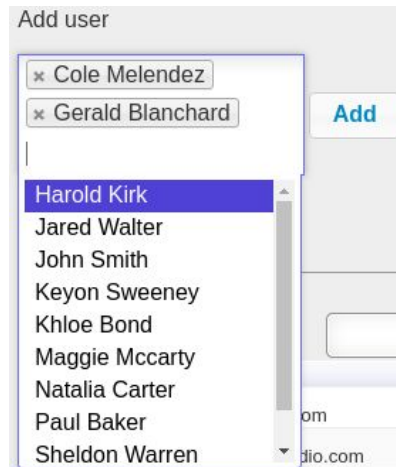


4. Click the desired user, “Cole Melendez,” from the dropdown list, if done correctly the selection will look like the picture below:

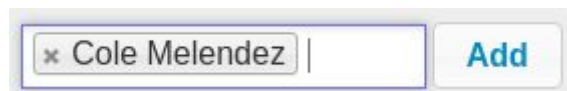



Note: To facilitate speed in adding users, multiple users can be selected, for example,

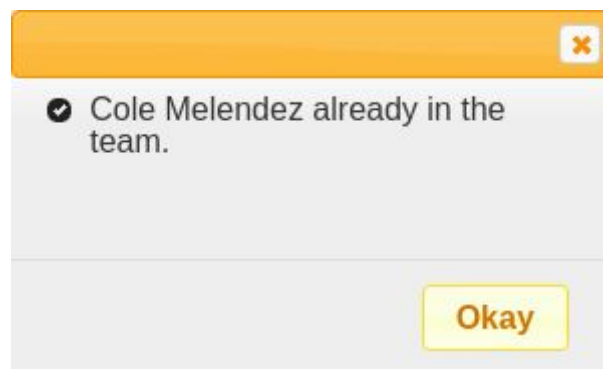
“Gerald Blanchard,” can be selected as shown below:

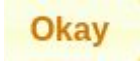


Both of the desired users that were clicked are added to the input box, if a user was clicked by accident the user can be deleted by pressing the, “X,” to the left of the user’s name:



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:*

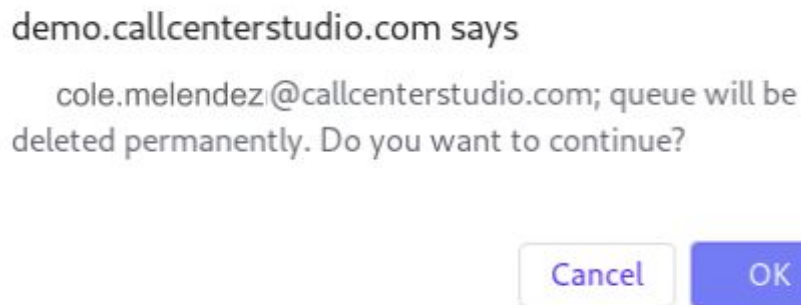



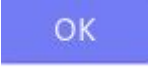
*Using this input box, type the user's email to find them within the Team member list easily.*

*Shown below:*

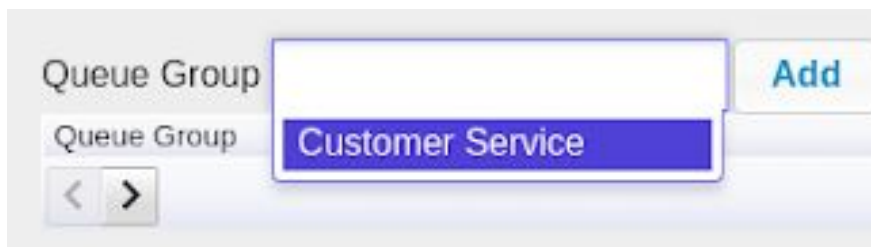


Team members can be deleted here as well by pressing, , to the right of checkmarks. If the, , is clicked the pop-up below will be shown to confirm the deletion:



- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , 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:





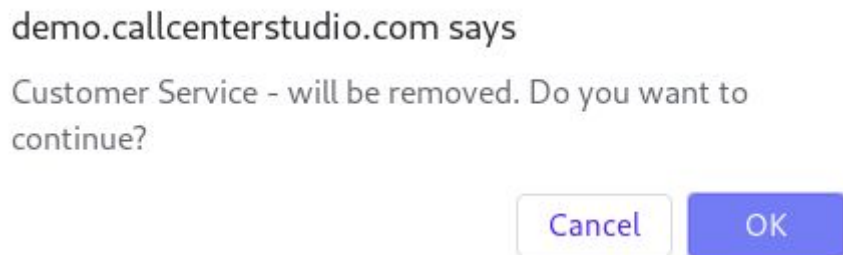
Note:


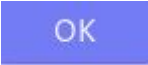
- To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.
- Selected queues can also be deleted similar to users by clicking the, “X”, to the left of the queue name.


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:

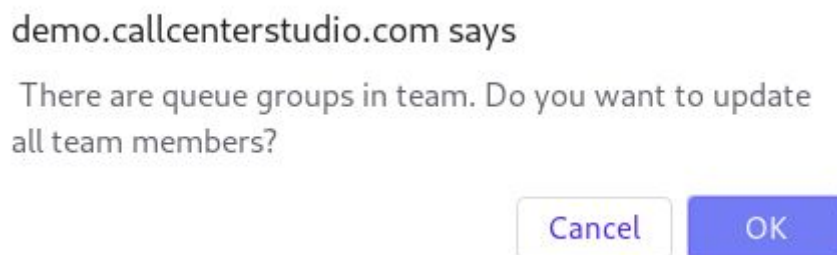


Queues can be deleted here as well by pressing, , to the right of the queue name. If the, , is clicked the pop-up below will be shown to confirm the deletion:

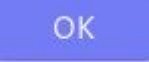


- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

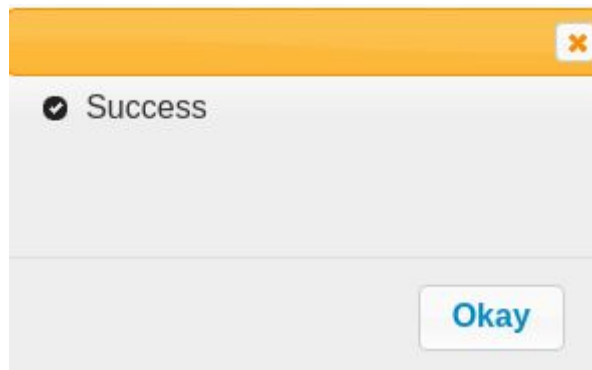
10. Once the user and queue selection is complete, the information can be saved by clicking the save button, , the following pop-up box will appear:




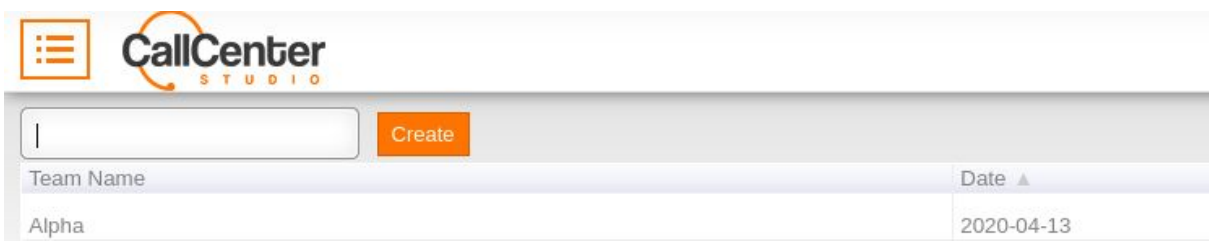


11. Click the Ok button, , to confirm the update.


*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:

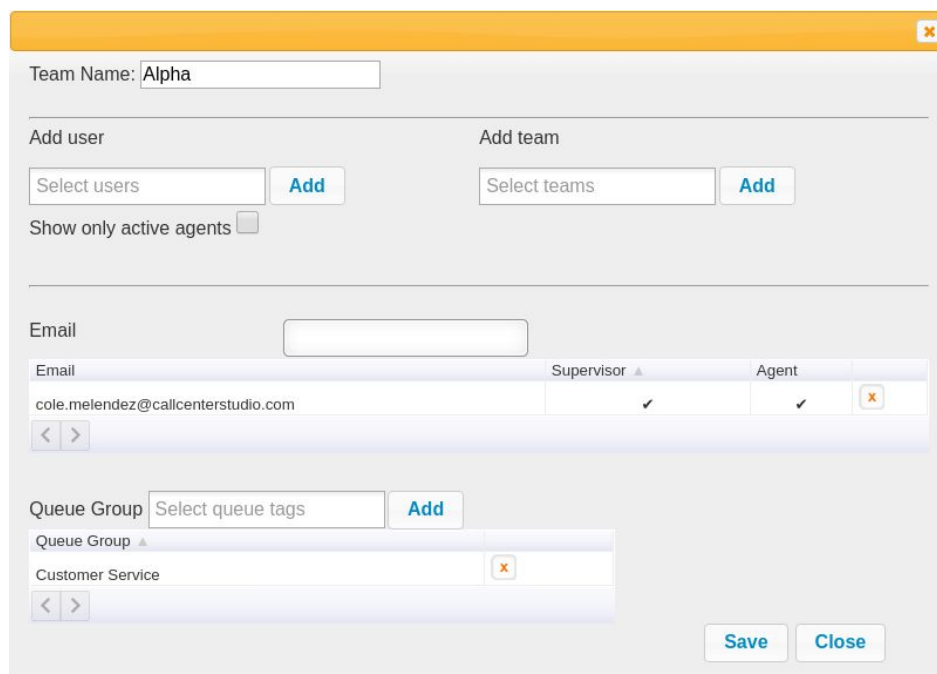


## Editing a Team

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:*




The screenshot shows a pop-up window titled 'Alpha' with a close button in the top right corner. The window contains the following elements:

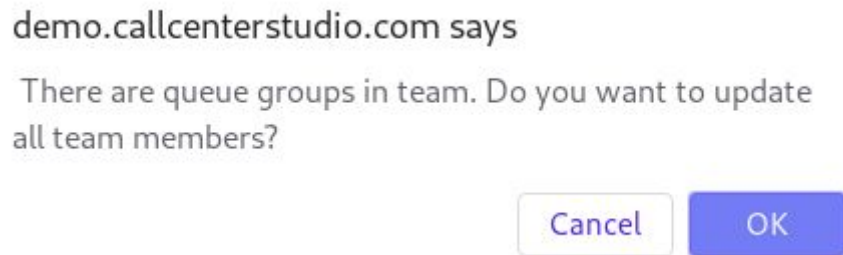
- Team Name:** A text input field containing 'Alpha'.
- Add user:** A section with a 'Select users' input field, an 'Add' button, and a 'Show only active agents' checkbox.
- Add team:** A section with a 'Select teams' input field and an 'Add' button.
- Email:** A text input field.
- Table:** A table with columns for 'Email', 'Supervisor', and 'Agent'. The first row contains 'cole.melendez@callcenterstudio.com', a checkmark, and another checkmark. There is a close button (X) in the rightmost cell.
- Queue Group:** A section with a 'Select queue tags' input field and an 'Add' button.
- Queue Group List:** A list with one item 'Customer Service' and a close button (X).
- Buttons:** 'Save' and 'Close' buttons at the bottom right.

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

2. Make changes as desired.

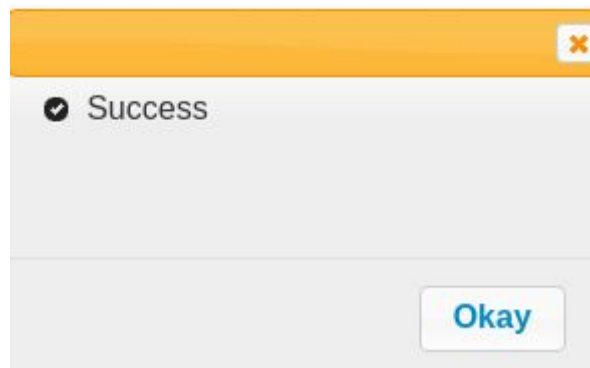
3. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:



4. Click the Ok button, , 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, , to confirm the changes.

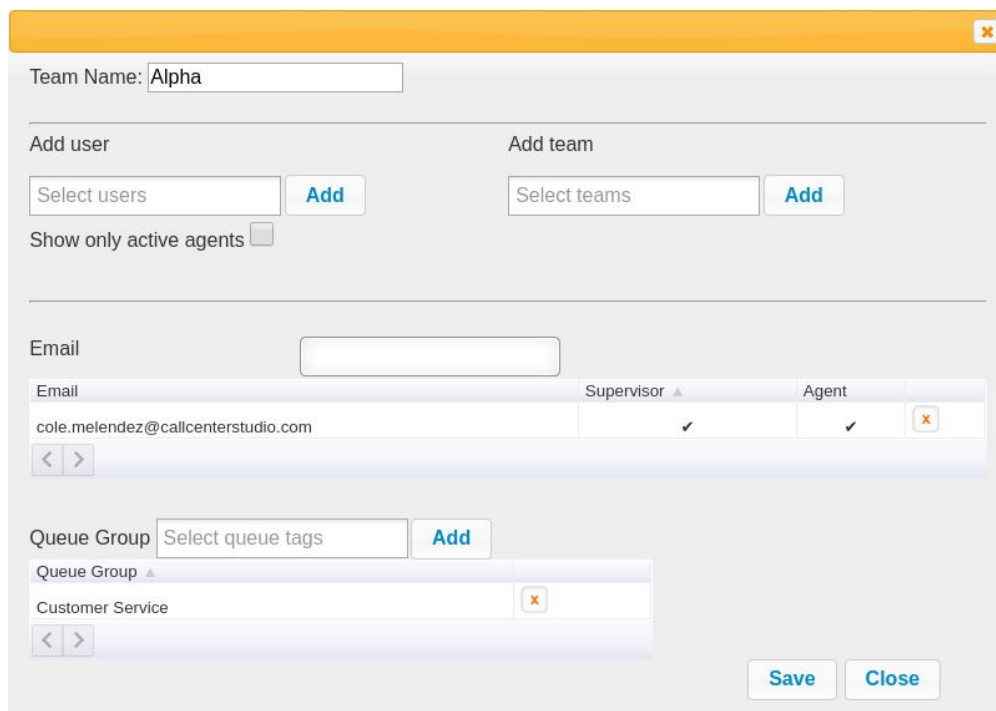
## Adding another Team to an Existing Team

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:



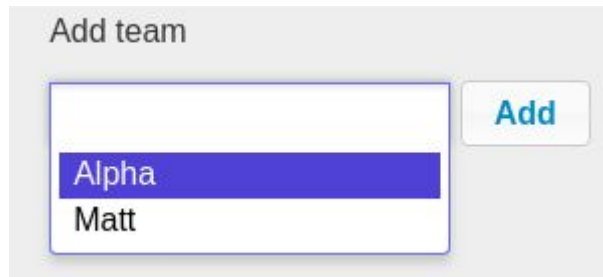
A screenshot of a team pop-up window. The window has a yellow header bar with a close button. The main content area is white and contains the following elements:

- Team Name:
- Add user:
- Add team:
- Show only active agents
- Email:
- Email table:

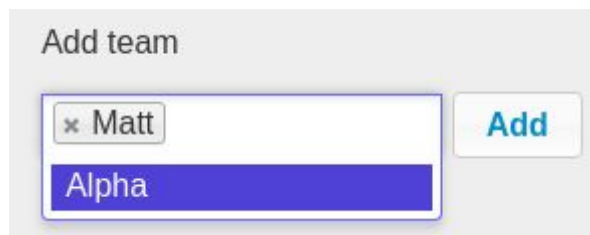
Email	Supervisor	Agent	
cole.melendez@callcenterstudio.com	✓	✓	<input type="button" value="x"/>
- Queue Group:
- Queue Group table:

Queue Group	
Customer Service	<input type="button" value="x"/>
- Save  Close

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:




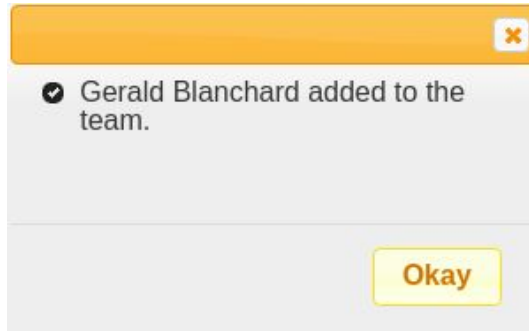
3. Click the desired team, “Matt,” from the dropdown list, if down correctly the selection will look like the picture below:




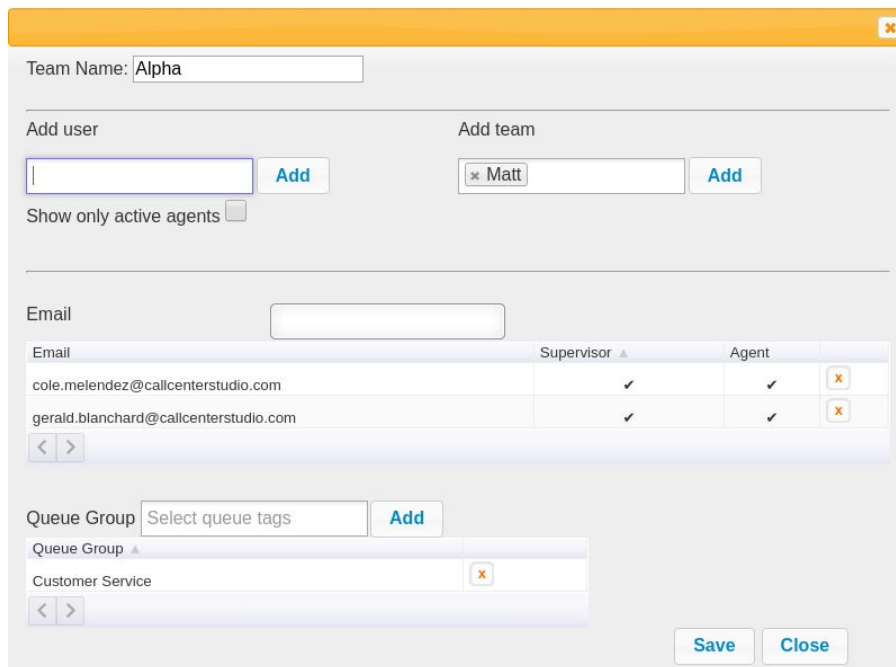
*Note:*

- *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:




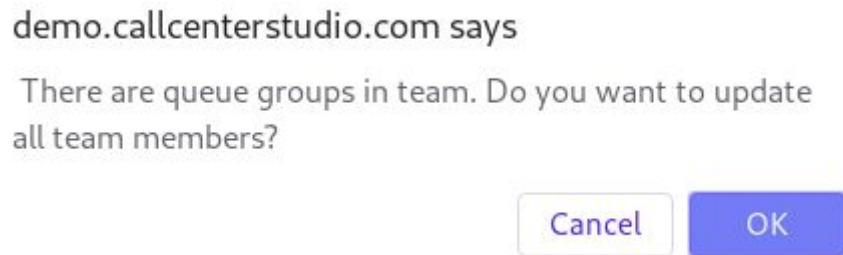
5. Click the Okay button,  , to confirm the changes. The team members from the added team, “Matt,” will be displayed with the team members from “Alpha,” as shown below:



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

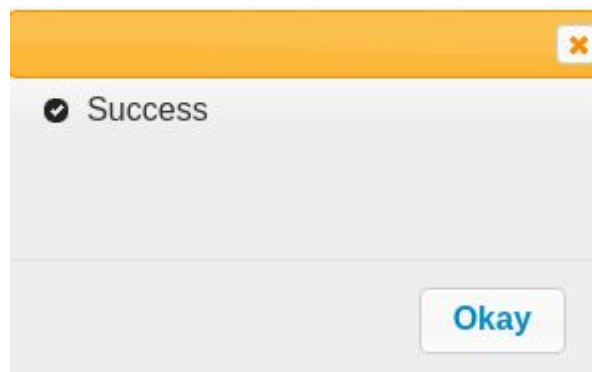
6. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:



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

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

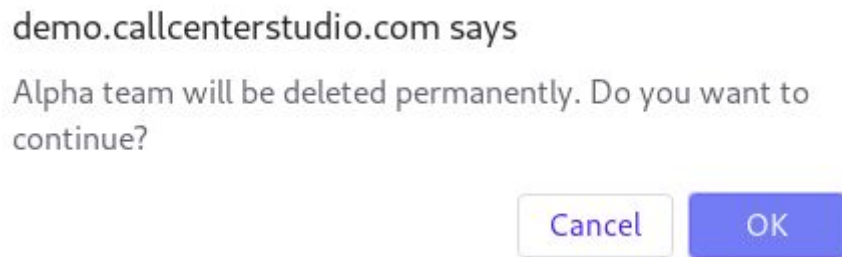


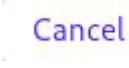

8. Click the Okay button, , to confirm the changes.

## 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, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

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

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