Team Role
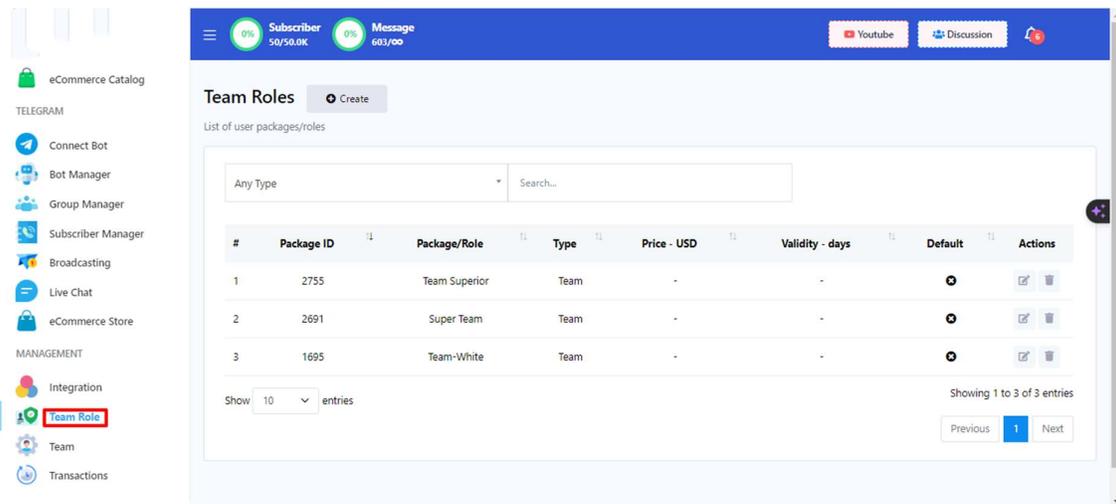
In our chatbot platform, a team role defines the specific duties assigned to each team involved in managing different tasks. A team can comprise multiple members. The process of adding team members is outlined in the Team section of our platform. To assign tasks to team members, you first need to establish a team role and then assign permissions for the tasks you want the team members to handle.
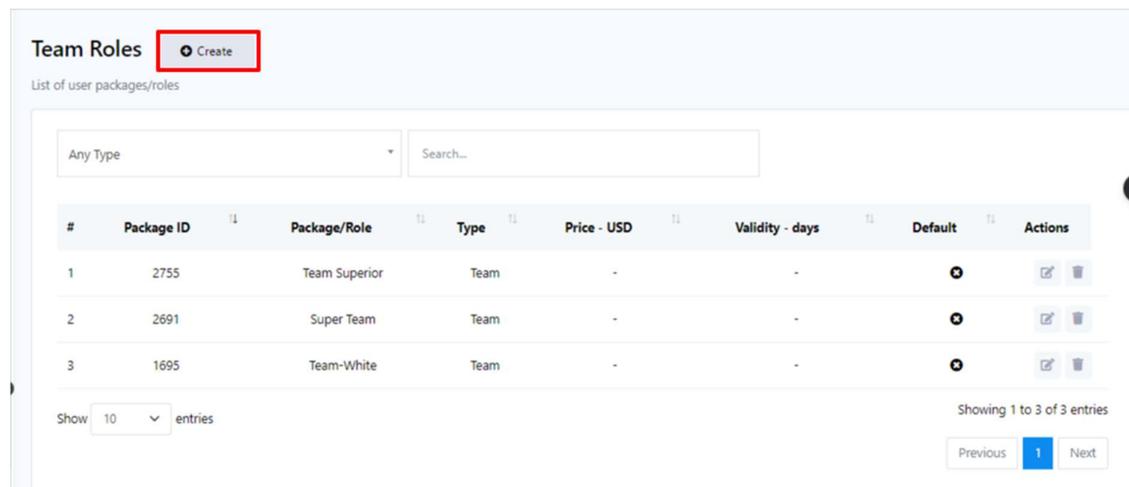
Here's how to create a Team Role:

Create Team Role
Create a new team role

Information

TEAM ROLE NAME*

1.Give team name

- CONNECT ACCOUNT
- SUBSCRIBERS
- BOT MANAGER
- LIVE CHAT
- LIVE CHAT - ADVANCED   ☐ CREATE ☐ UPDATE ☐ DELETE ☐ SPECIAL
- BROADCAST   ☐ CREATE ☐ UPDATE ☐ DELETE ☐ SPECIAL

2.Toggle needed options

- WHATSAPP - WEBHOOK WORKFLOW   ☐ CREATE ☐ UPDATE ☐ DELETE ☐ SPECIAL
- WHATSAPP - ECOMMERCE CATALOG   ☐ CREATE ☐ UPDATE ☐ DELETE ☐ SPECIAL
- WHATSAPP - WORDPRESS/SHOPIFY INTEGRATION   ☐ CREATE ☐ UPDATE ☐ DELETE ☐ SPECIAL
- TELEGRAM - GROUP MANAGEMENT   ☐ CREATE ☐ UPDATE ☐ DELETE ☐ SPECIAL
- TELEGRAM - NATIVE ECOMMERCE STORE

🖫 Create

1. Begin by accessing your Dashboard, and then scroll down to the `Management` section.

2. Locate and click on the `Team Role` option.

3. Within the Team Role menu, click on the `Create` button.

4. Give a team name.

5. Toggle on the permissions that you want to give your team.

6. Click on Create.

Once you have created a team role, you can assign team members to it. For example, if you want a team to handle live chat functionality, you can create a team role for live chat and then create team members and assign them to this specific team role. You can also add team members to multiple team roles if needed.

Team Member

On our platform, a team member is more than just a user. They are specialized individuals with access to a variety of features such as live chat and subscriber management. This role is particularly useful when you have a large number of registered users and need assistance with managing their data or other user-related tasks.

You have the flexibility to add team members as you need, each with access to different features based on the permissions you grant. This allows for efficient and effective management of your platform.

Note: It`s important to note that a registered user cannot be converted into a team member. If a user has already registered with an email address, that address is stored in our database as a registered user, and cannot be used to create a team member profile. To add a team member, a new, unique email address is required. This ensures clear distinction between user roles and maintains the integrity of our platform`s structure.

Here's how you can add a team member:

Team Members   ⊕ Create

List of subscribed users & team members

| Any Package/Role ▾ | | Search... | | | | | | Options ▾ |

#	Id	Avatar	Name	Email	Package/Role	Status	Actions	Expiry date	Created	Last login	Last IP
1	52824	👤	Queen	ne	Team Superior	🟢	✎ 🗑	-	2nd Nov 23	2nd Nov 23 14:48	103.121.61.148
2	51858	👤	Ron		Team Superior	🟢	✎ 🗑	-	23rd Oct 23	1st Nov 23 11:42	103.121.61.148
3	51857	👤	Charles		Super Team	🟢	✎ 🗑	-	23rd Oct 23	23rd Oct 23 14:40	103.121.60.46
4	30150	👤	Wilson		Team-White	🟢	✎ 🗑	-	11th Jun 23	23rd Oct 23 13:17	103.121.60.46

Show 10 entries

Showing 1 to 4 of 4 entries

Previous   1   Next

Create Team

Create a new team member

User Information

FULL NAME *

EMAIL *

MOBILE

PASSWORD *

CONFIRM PASSWORD *

ADDRESS

Fill out the form

TEAM ROLE*

Select

ALLOWED TELEGRAM BOTS

ALLOWED WHATSAPP BOTS

ALLOWED ECOMMERCE STORES

PASSWORD *

CONFIRM PASSWORD *

ADDRESS

TEAM ROLE*

Select

ALLOWED TELEGRAM BOTS

ALLOWED WHATSAPP BOTS

ALLOWED ECOMMERCE STORES

Status

🖫 Create

1. Begin by accessing your Dashboard, and then scroll down to the `Management` section.

2. Locate and click on the `Team` option.

3. Within the Team menu, click on the `Create` button.

4. Fill out the User Information form. Enter your full name, email, mobile, password, address, team role, allowed telegram bots, allowed WhatsApp bots, allowed ecommerce stores.

5. Toggle the status button.

6. Click on Create.

And your Team Member will be added. Let's dive into Team Roles Now!