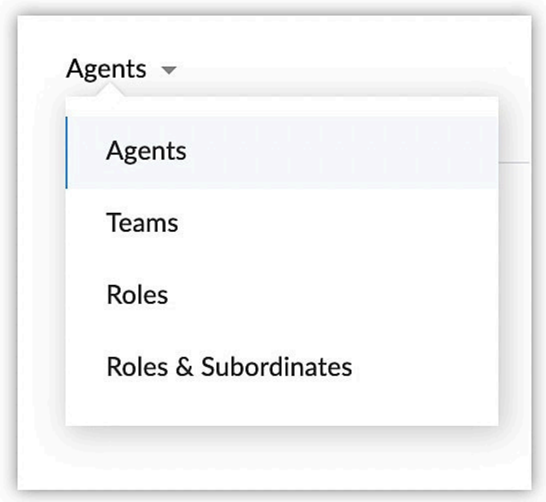
Adding and Managing Teams

Building teams in Zoho Desk

Teams consist of users or agents who are grouped based on similar attributes, like skills, job profiles, regions, interests, and expertise. Depending on the business needs and support process, teams can be comprised of sub-teams, agents, roles, and roles with subordinates.



Teams are particularly useful when you need a specific set of agents to manage common activities. Both tickets and activities (i.e. tasks, events, and calls) can be assigned to teams.
For example, a team can be built from a group of agents who are experienced at resolving issues for enterprise business customers. From onboarding, implementation, to post-implementation support, enterprise customer tickets can be managed exclusively by this team. Meanwhile, a team of 5-8 agents can be created to handle tickets from various other support tiers. Team-based support services help ensure that customers receive prompt responses with tailored and accurate solutions.

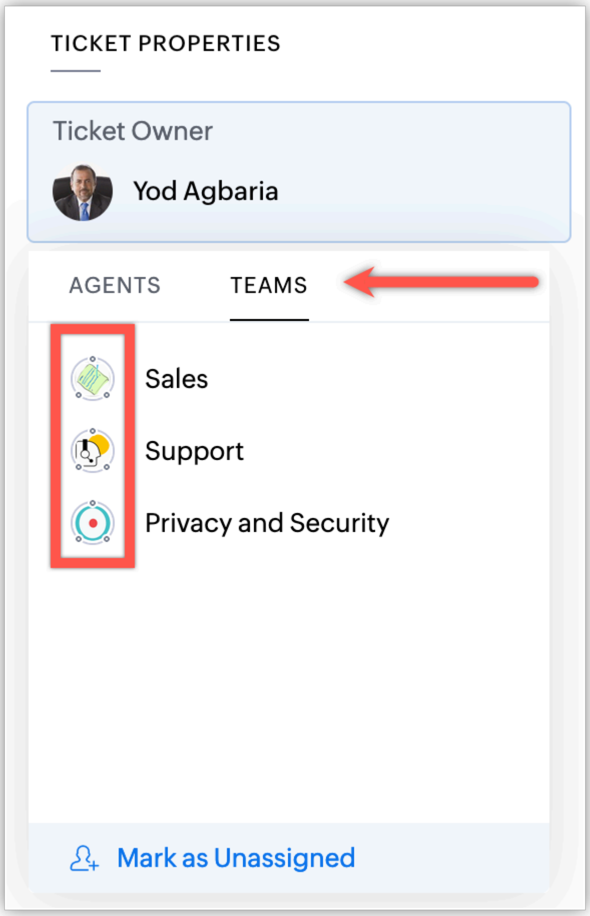
Availability

Permission Required
Users with administrative privilege who have the Agents and Teams permission can create and manage teams.
Check Availability and Limits

Creating teams

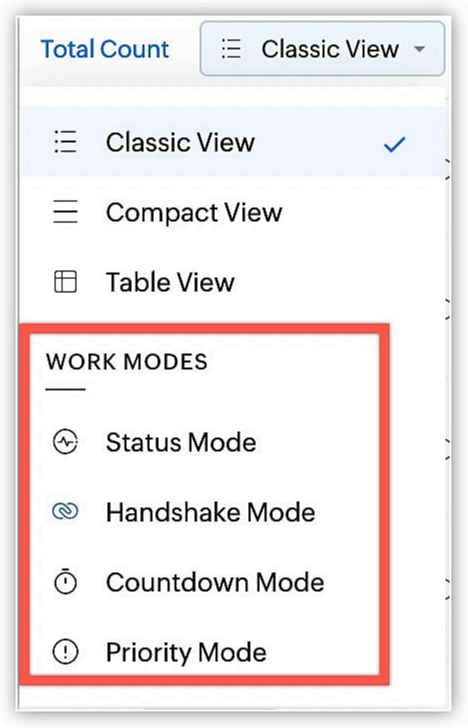
Teams are department-specific. A team can consist of agents from the department, agents from subteams or specific roles, or from the subordinate roles. A department can consist of a maximum of 60 teams. Each team can consist of a maximum of 100 agents, 50 sub teams, 20 roles, and 20 roles with subordinates. Creating teams requires the following actions:

- **Selecting the department:** An organization can have multiple departments and each of them can have support teams. For example, a service industry provider may have departments for repairs and maintenance, cleaning, and painting. Each department can be assigned its own customer support team. So, while creating a team, you must choose the appropriate department.
- **Providing a team name:** The team name helps with easy identification. For example, you could name a team, "Repair & Maintenance Support."
- **Adding a suitable logo**: A team logo or icon represents the team visually. Logos can be in the form of colored icons or custom images that will help others in the organization identify the team quickly. For example, the Privacy & Security team would be easy to identify with a red logo. Logos can help you identify a team during:
    - Creation of a ticket, when the ticket owner must be selected.

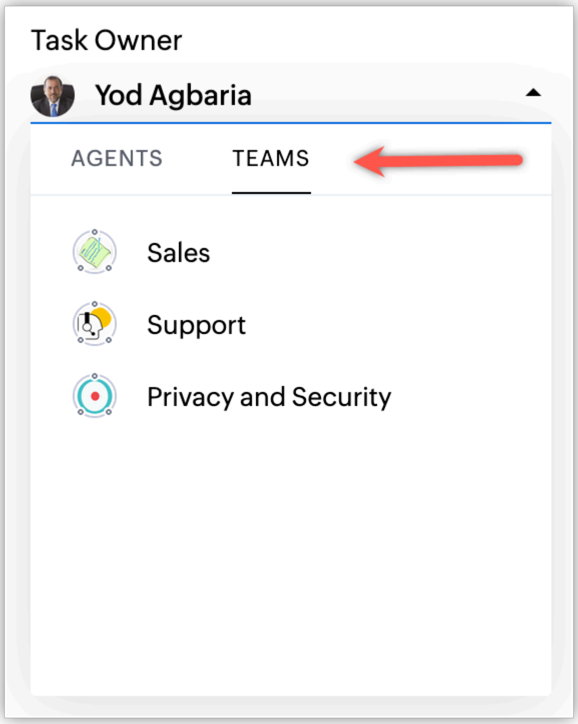


    - Manual ticket assignment.

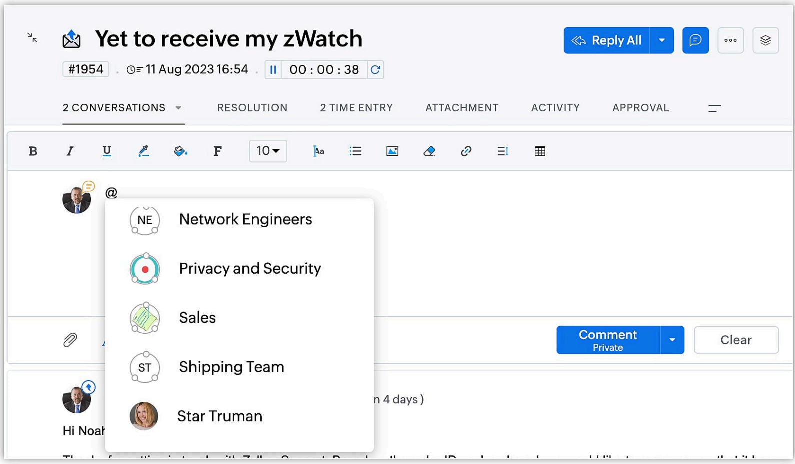
- While viewing tickets in the different Work Modes.



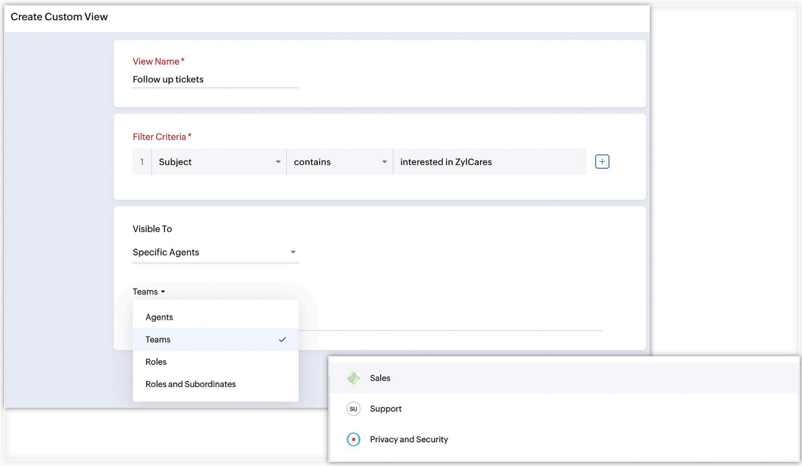
- While assigning activities to a particular team.



- While viewing associated tickets for **Contacts** and **Accounts** within *Customers* module.
- While tagging a team in a **private** comment on tickets. However, after a team is tagged, only the team name will appear.



- While creating a custom view for tickets, team logo will appear while setting the visibility.



- Team logo will also be visible in **Activities** module when an activity associated to a ticket is assigned to a team.
    - Within Activities list views. It will be visible in both Classic View and Compact View.

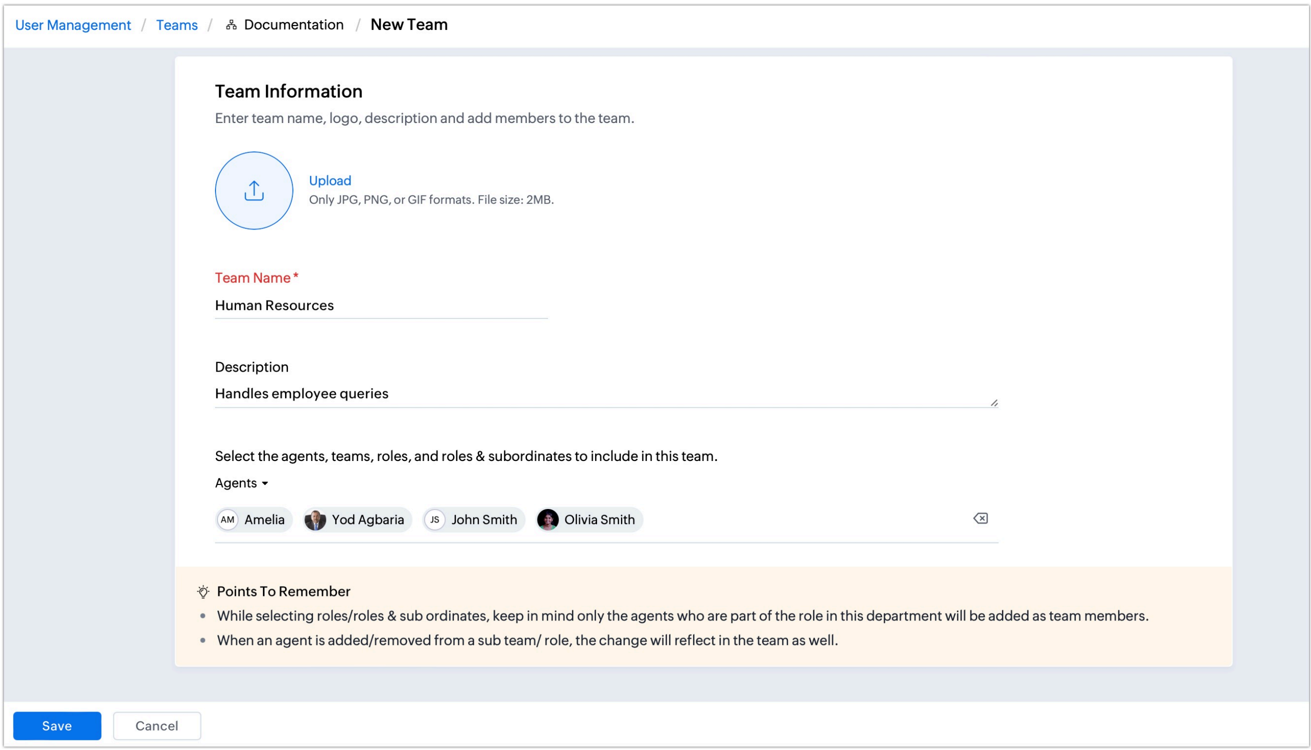
- **Giving a team description:** A brief description can help others in the organization identify the activities managed by a particular team.
- **Selecting the team sources:** Since teams are department-specific, only agents who are part of a department can be added to a team. Various roles, sub-roles, and additional teams can also be added. If agents are removed or added to a role, their status with the team will be automatically updated.
  For example, the Sales team has two sub-teams: Customer Onboarding and the Presales teams. If users are transferred from one department to another or they leave the organization their current role will be updated in teams automatically.

Points to remember

- Teams are specific to a department, which means only agents who belong to a particular department can become members of its team.
- A team can consists of a maximum of 100 agents who can be part of 50 sub-teams or 20 roles.
- Each department can consist of 60 teams.
- Teams can contain agents, sub teams, agents under a role and agents under a role and their subordinates.
- It is not necessary to associate every agent to a team.
- Agents can be members of more than one team both within and across departments.
- If an organization downgrades from Professional or Enterprise plans:
    - New tickets and activities will not be assigned to teams.
    - Teams tab will not be displayed during auto-assignment.
    - Existing tickets that were assigned to a team will continue to display the respective team name.

To create teams

1. Go to **Setup** > **User Management** > **Teams**.
2. Click **New Team**.
3. In the *Add New Team* page, do the following:
    a. In the *Team Information* section, specify the **Team Name,** provide a **Logo** and **Descriptio**n for the team.
    b. Select the **Team members** to be added.
    You can select agents, roles, roles & subordinates, and different teams as members of the new team.
4. Click **Save**.

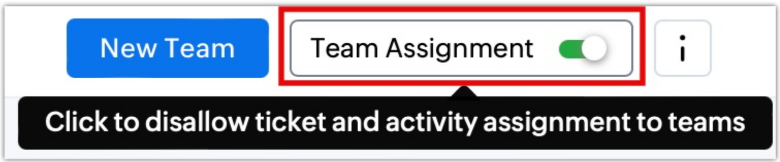


Enabling Team Assignment to auto-assign tickets and activities

Teams can be assigned tickets, events, and tasks automatically through round-robin and direct assignment rules. When creating teams, you must toggle the Team Assignment option to ensure the teams (created in a department) are displayed during auto-assignment.

To enable team assignment

1. Go to **Setup** > **User Management** > **Teams**.
2. In the *Teams* page, select a **Department** from the drop-down list.
3. Toggle **Team Assignment** in the upper right corner.



Note

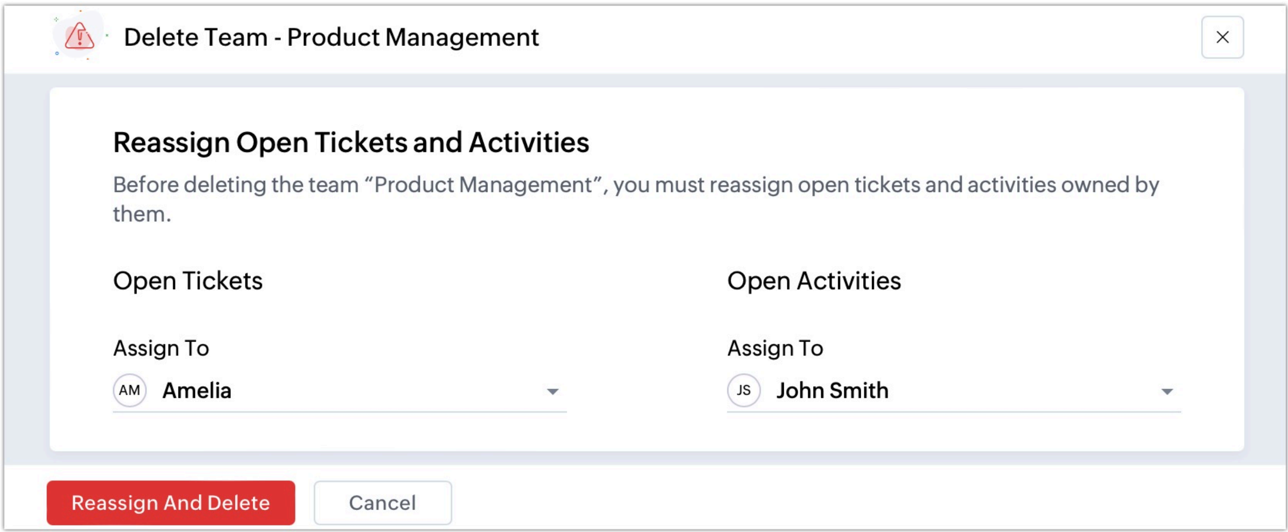
- If Team Assignment is not enabled, only the list of agents from the particular department will be displayed during ticket assignment, the Teams tab will not be displayed.
- Team assignment is department specific. So once enabled it will apply to all the teams within a department.
- Team Assignment is enabled by default for every department. If needed admins can turn it off.

Editing and Deleting teams

Once a team is created, you may need to update the team logo or name, add or remove agents from the list, or change the team description. Managers or Admins may consider deleting a team based on the organization's evolving needs. **Before deleting a team, all open tickets and activities that are associated with the team should be re-assigned to other agents or teams.**

To edit or delete teams

1. Go to **Setup** > **User Management** > **Teams**.
2. Hover on a **Team** and click **Edit or Delete**.
3. If you choose to Edit, make the necessary changes and click **Save**.
4. If you choose to **Delete**, select the agents or teams under *Open Tickets* and *Open Activities* drop-down list.

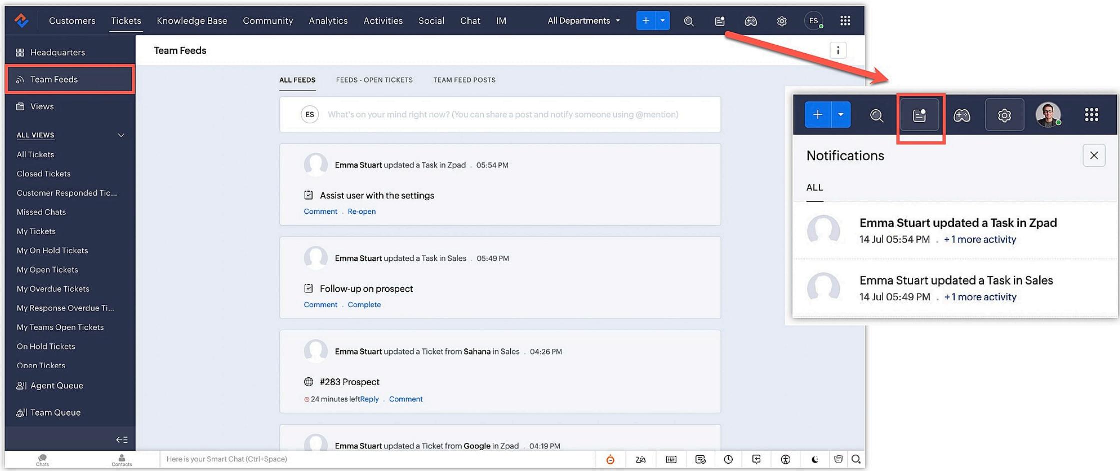


5. Click **Reassign and Delete**.

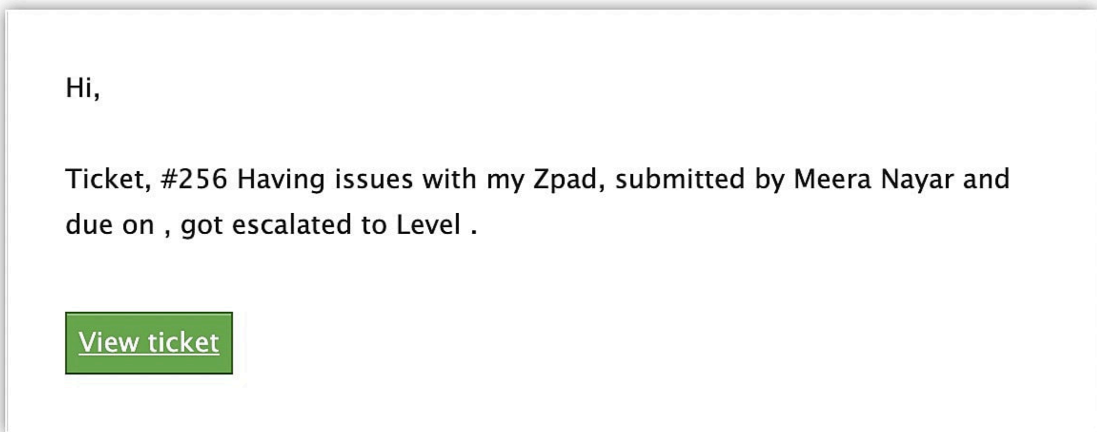
Sending notifications to Teams

When tickets or activities are assigned to a team, the team members can be sent notifications through email and SMS to ensure they are aware of the new assignments and can take it up as per their availability. The notifications will also be available in the Feeds.

Feed notifications

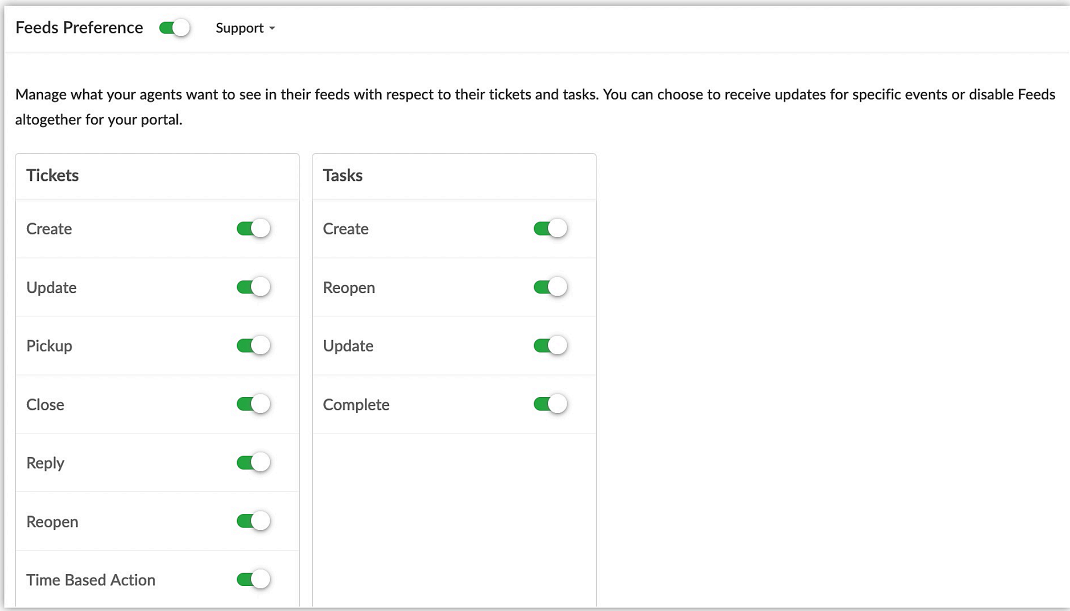


Email or SMS notifications



To enable team notifications

1. Go to **Setup** (⚙) > Customization > **Notifications.**
2. From Notifications on the left panel, click **Notification Rules**.
3. Under *Team Notifications*, toggle the necessary option.
4. From *Feeds Preference*, toggle the criteria for **Tickets** and **Tasks notifications**.



SEE ALSO

[Team Overview and Decision Making]