Team Member Admin 101

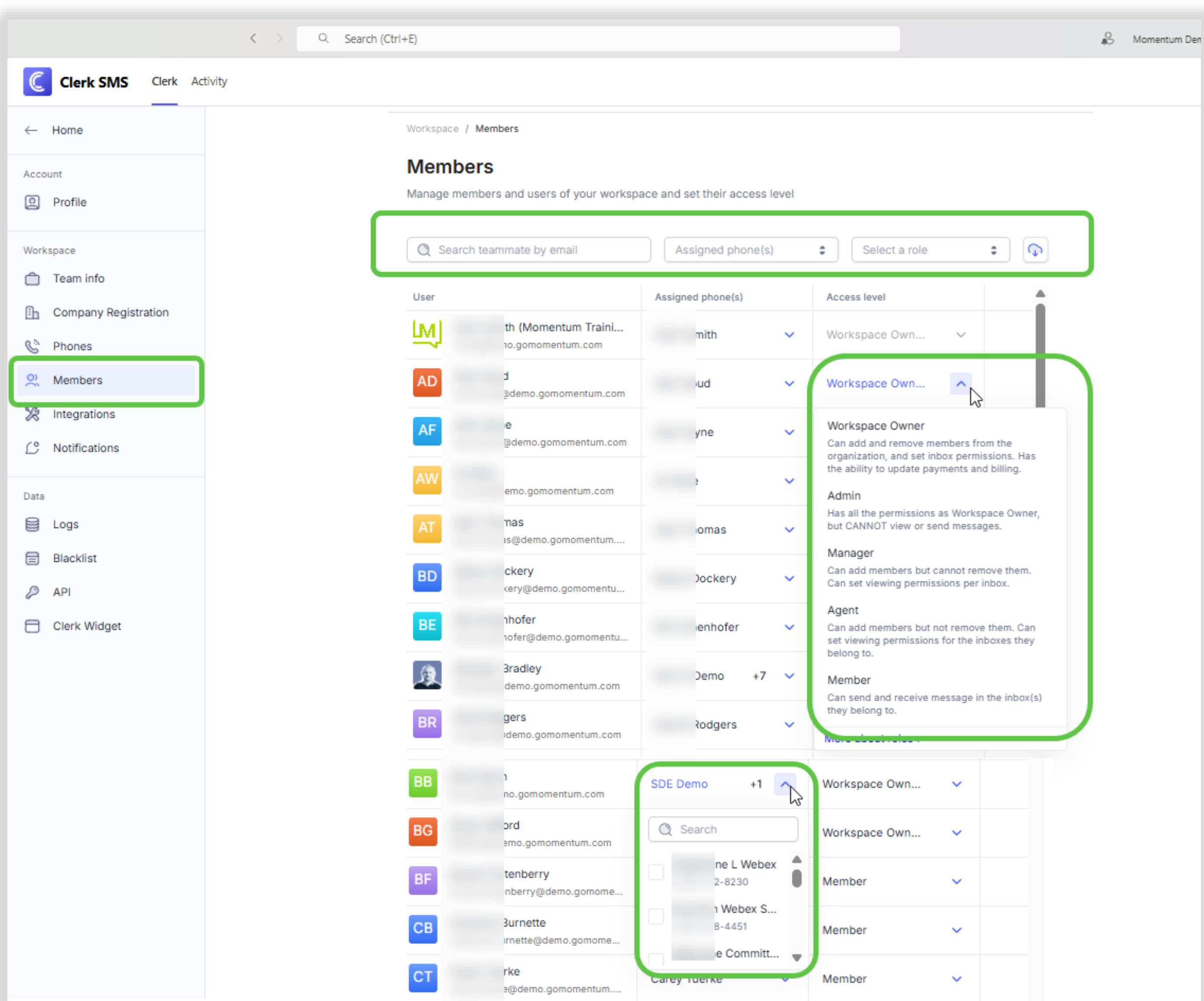
The Clerk Chat *Administrators* (Workspace Owners and Admins) are granted sufficient control to effectively manage their organization's "team" members, along with a range of features designed to streamline these daily tasks, including:

- **Assign Team Members to Shared or Individual Inboxes**: Administrators can also assign team members to shared or individual inboxes as needed. Shared inboxes allow multiple team members to access and collaborate on incoming messages or requests, perfect for support teams, sales teams, etc. - while individual inboxes provide a dedicated space for each specific team member. And, individuals can be assigned to both types of inboxes, when necessary.
- **Set Roles for Team Members**: Define individual member access permissions by assigning roles which offer useful access levels, such as administrator, manager, or member, depending on their responsibilities and the level of control you want them to have. This ensures that team members only have access to the features and information relevant to their roles without negatively impacting security or service.
- **Invite Team Members**: Those with administration roles can easily invite team members to join the Clerk Chat workspace by quickly sending invitations to become part of your team to their work email.

To View Team Members

New team members are automatically added when licenses are purchased/provisioned by the Service Provider. You can view available Team Members while working in Clerk Chat as a Workspace Owner or Admin:

1. Go to **Settings** → **Workspace** → **Members**.



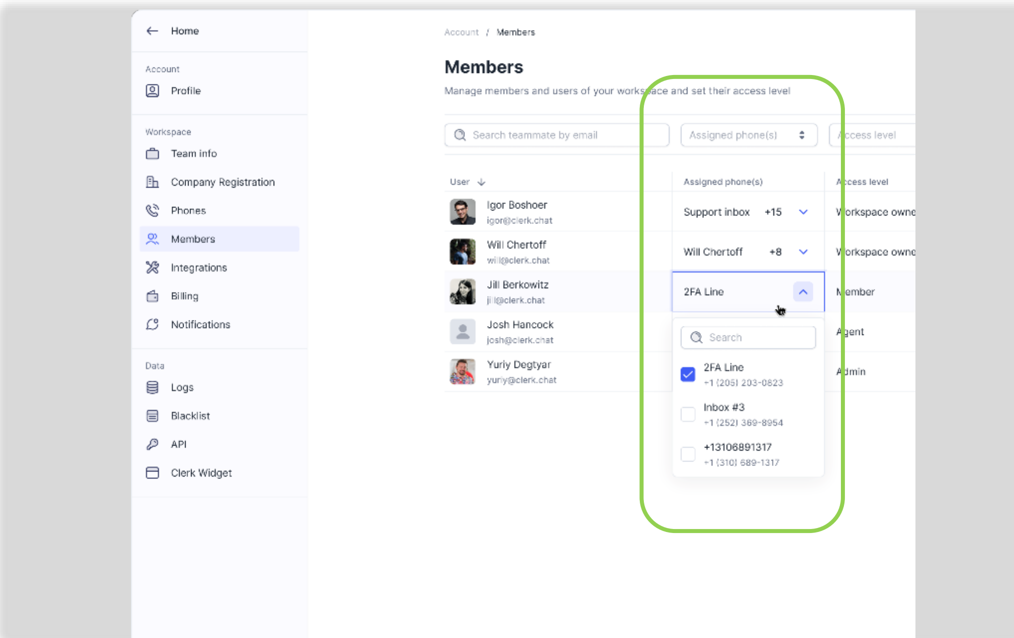
To Manage Phone / Inbox Assignments for Members

While working in the Clerk Chat application:

1. Navigate to **Settings** → **Workspace** → **Members**
   The list of all active members displays.

2. Click on the user to select and then under Assigned Phones column, click on the drop-down carrot to view selection options.

3. Click to place a check next to the inbox(es) you wish the member to access using the dropdown selection tool. *A checkmark next to a line indicates the inbox(es) currently assigned to the user.*
   Once finished the assignments automatically update. The next time the user goes to their Clerk Chat application, they can view and start sending & receiving SMS via that inbox/number.



To Manage Role Assignments for Team Members

The Administrator roles can assign specific Role-based permissions to individual users or to groups of users, giving them control over which actions each user can perform within the app.

1. Go to: **Settings** → **Workspace** → **Members**. *The Member dashboard notes the current Access Level for each Team member.*

2. Scroll, or use search, filter, or pagination tools to locate a member in the list, as needed

3. Click on the drop-down selection tool in the *Access Level* column

4. Click on the correct option to assign or update the role - most end-users should be set up as Members.
   The role is updated for that Team Member immediately.
   You may repeat for each team member, as needed.