

How do I nominate users to manage an organization's tickets?

Eloise Rea - 2023-08-01 - Comments (0) - Agent

The organization managers feature allows specific people to oversee all of the ticket happenings for their organization. Normally, a person can only see the tickets that they've created or are a participant in. However, an organization manager can see any ticket associated with their organization and even automatically be added as a participant to any new tickets for their organization.

Nominating Organization Managers

A person can be set as an organization manager in two places in the agent interface:

- On a person's CRM profile, next to their position field.
- On the organization page, in the members list. Organization managers have an icon next to their name. Clicking this icon will toggle manager status on and off.



Alice Barrel

86

Sales Lead

VIP

+ Add



Tickets +



Open (2) R

Summary +

196 Problem re



Alice Barrel

Contact Information +

195 Need help v



Alice Barrel

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Organization

Energy.io (78)

Manager



The screenshot displays the Energy.io help center interface. At the top, the organization name "Energy.io" is shown with a search bar and filters for "High Priority", "Partnership", and "VIP". Below this, there are navigation icons for home, tickets, and other features.

The main content is divided into two columns. The left column contains organization details:

- Summary +**
- Contact Information +**: Phone number +44 07969 236608.
- Properties**: Date created Oct 14, 2021; Usergroup; Machine SN Dongle nr; TBC 223445569 51102; TBD 555666777 61101.
- Hierarchy**: Parent City Air Inc.; Children; Add Organization.
- Associated Domains +**: energy.com, energy.io.
- Members +**: List of users including Agatha Bardle, Alice Barrel (Manager), Audrey Merivale, Doris Weather..., Heather Brown, Hilda Adair, Lily Jones, and Spencer Hastin....

The right column shows a list of tickets:

- Open (28)** / **Resolved (36)**
- Ticket 196: Problem reading the meter (Email) by Alice Barrel - <aliceburvin@gmail.com> (3 day).
- Ticket 94: Chat follow up by Audrey Merivale - <audreym84@example.com> (7 day).
- Ticket 315: Forwarding a Ticket Thread by Lara Proud - <lara.proud@deskpro.com> (1 mo).
- Ticket 189: How do I read my meter? (Form) by Spencer Hastings - <alesia_client@gmail.com> (4 day).
- Ticket 168: New SMS from +447969236608 by Audrey Merivale - <audreym84@example.com> (7 day).
- Ticket 385: I could not load my bill by Agatha Bardle - <agathabardle@example.com> (2 wk).
- Ticket 373: Agatha Bardle - <agathabardle@example.com> (3 wk).
- Ticket 365: Problem with my computer by Agatha Bardle - <agathabardle@example.com> (2 mo).
- Ticket 361: New Hire in CS Team by Agatha Bardle - <agathabardle@example.com> (2 wk).
- Ticket 336: Internal Support Request by Audrey Merivale - <audreym84@example.com> (3 mo).
- Ticket 385: Welcome to 221B by Agatha Bardle - <agathabardle@example.com> (2 wk).
- Ticket 275: Call from +447969236608 by Hilda Adair - <hildadair@example.com> (6 mo). A red arrow points to this ticket.
- Ticket 262: Agatha Bardle - <agathabardle@example.com> (4 mo).
- Ticket 261: Call from +447969236608 by Doris Weatherspoon (4 mo).
- Ticket 268: Call from +447969236608 by Doris Weatherspoon (3 mo).
- Ticket 256: Problems with the meter by Agatha Bardle - <agathabardle@example.com> (6 mo).

From the Organization Manager's perspective

An organization manager can view and search all of their organization's tickets in the help center. They will have a new option when clicking on their user profile icon.

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Contact Us



Alice Barrel



My Profile



My Tickets



Energy.io Tickets



My Chats


Logout

If they wish to automatically join any tickets for their organization when they're created, they can set this on their profile page:

Name *

Alice Barrel

Language *

English (UK) 



Change or delete profile picture?

Timezone

Other 



UTC 

Automatically join Energy.io's tickets?