

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

Eloise Rea - 2023-08-01 - Sylwadau (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



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Organization

Energy.io (78)

Manager



The screenshot displays the Energy.io help center interface. At the top, there's a header with the logo and navigation tabs: '1', 'High Priority', 'Partnership', 'VIP', and '+ Add'. Below the header, there are icons for home, tickets, search, and settings. The main content is divided into two columns. The left column contains organization details: 'Summary +', 'Contact Information +', 'Properties', 'Hierarchy', 'Associated Domains +', and 'Members +'. The right column shows a list of tickets under the heading 'Tickets +', with sub-headings for 'Open (28)' and 'Resolved (36)'. A red arrow points to the user profile icon of Hilda Adair in the ticket list, which is highlighted in blue. The ticket list includes details such as ticket ID, subject, sender, and time taken to resolve.

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?