Permissions for Tasks and Macros

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As your helpdesk grows and your operations expand, you will need to further control your agents' permissions to use and access different features in order to keep things secure, and better manage everyone's workflows.

Macros

A macro is a command to run a pre-defined set of actions on a ticket, such as respond, add a label, change department and increase urgency, all in one go.

Where agents would previously have had to scroll through all their macros, you can section of certain macros to departments. For example, this macro is a part of the sales department, and would never be used outside the sales department. So why have it displayed there? You can set this up so it can only be applied to sales tickets.

Tasks

Tasks are pretty self-explanatory, they allow you to manage tasks/events outside of tickets, set descriptions and deadlines.

Task visibility can now be restricted to an agent, a team or a department. Just like the example in the macro above, the screenshot below refers to a Sales only task - so there is no need for full visibility to all departments. You can now set this to display only to a certain department or a specific team of agents.