

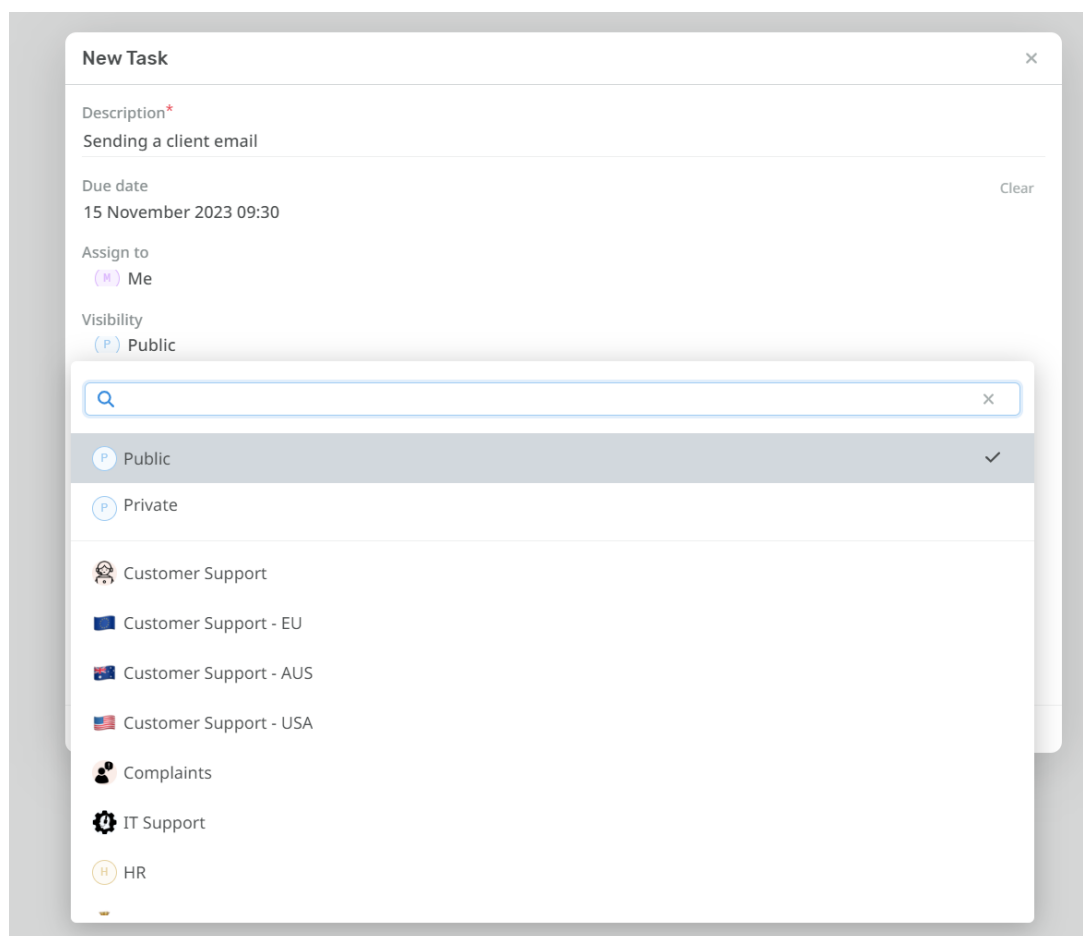
How do I make tasks visible to certain agents, teams, or departments?

Paul Davies - 2023-08-10 - Comments (0) - Agent

Managing the visibility of Tasks within your helpdesk is crucial for optimizing department, team, and individual agent workloads. You can control which Tasks are visible to different groups in the helpdesk by adjusting the **Visibility** and **Assignment** settings in individual Tasks.

Configuring Task Visibility

When you're configuring **Visibility** settings, you will have the choice between **Public**, **Private**, or **Departments**.



The screenshot shows the 'New Task' form in Deskpro. The form has a title bar 'New Task' with a close button. The main form area contains the following fields:

- Description***: Sending a client email
- Due date**: 15 November 2023 09:30 (with a 'Clear' button)
- Assign to**: (M) Me
- Visibility**: (P) Public

A dropdown menu is open for the 'Visibility' field, showing a search bar and a list of options:

- (P) Public (checked with a checkmark)
- (P) Private
- Customer Support
- Customer Support - EU
- Customer Support - AUS
- Customer Support - USA
- Complaints
- IT Support
- HR

Private: This setting ensures that only the creator and assignee of the task can view it.

Public: Opt for this option if you want all agent accounts associated with your helpdesk to have access to the task.

Departments: If you've opted for a department-specific visibility setting. This ensures that only agents from the designated department can view the Task.

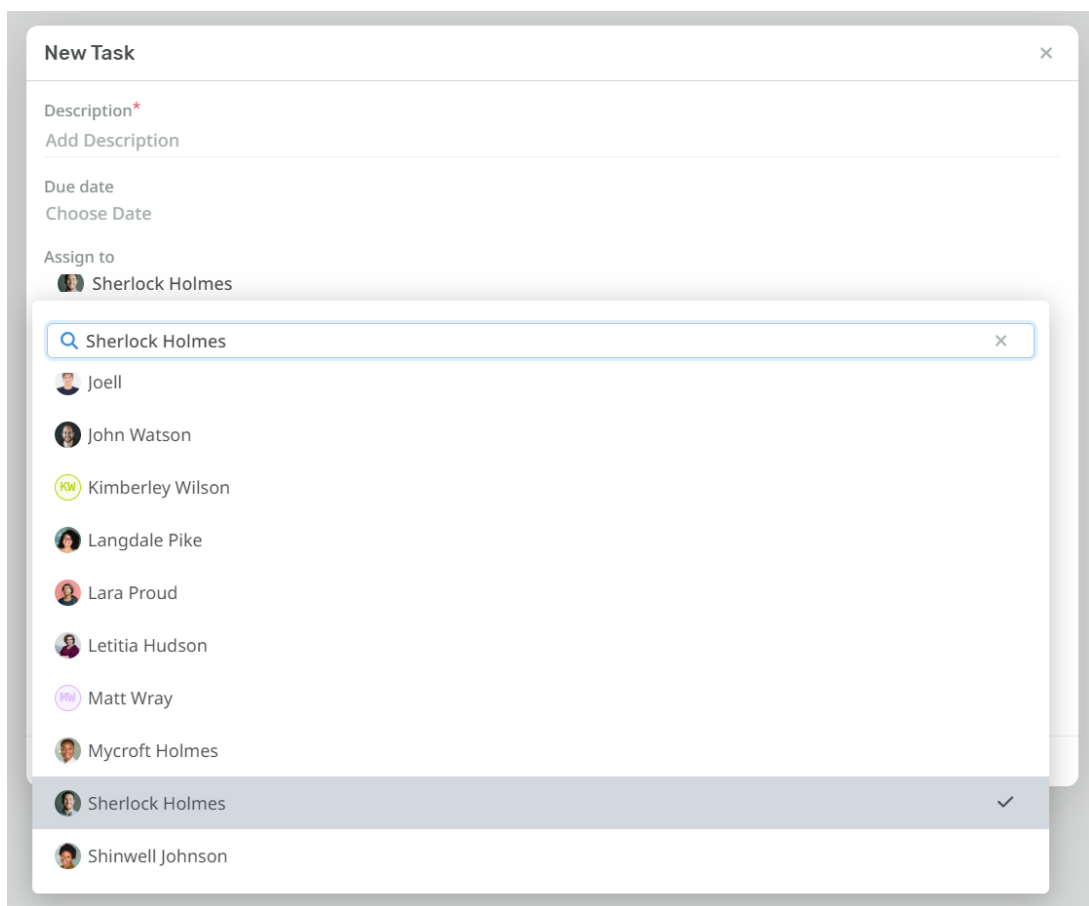
Assigning Tasks to Agents or Teams

After configuring the visibility of a Task, you can then assign the Task to the appropriate Agent or Team. The Assignment will interact with the visibility, so if a task is private and you assign it to a Team, only that team will be able to see the Task.

For assigning Tasks, the following choices are available:

Team Assignment: Assign the task to the relevant team. If visibility is private, this restricts task visibility to agents within the assigned team.

Agent Assignment: Assign a specific agent. Again, if visibility is set to private, only the agent that is directly assigned the Task will be able to view it.



The screenshot shows a 'New Task' form with the following fields:

- Description***: A text input field with the placeholder 'Add Description'.
- Due date**: A text input field with the placeholder 'Choose Date'.
- Assign to**: A dropdown menu showing a list of agents.

The dropdown menu is open, displaying a search bar with the text 'Sherlock Holmes' and a list of agents:

- Joell
- John Watson
- Kimberley Wilson
- Langdale Pike
- Lara Proud
- Letitia Hudson
- Matt Wray
- Mycroft Holmes
- Sherlock Holmes (highlighted with a checkmark)
- Shinwell Johnson

New Task

Description*

Sending a client email

Due date

15 November 2023 09:30

Clear

Assign to

(C) Complaints

Q Complaints

Me

2E 221B Energy Support

2L 2nd Line Support

C Complaints

Customer Support Managers

IT Support

PT PDF Team

S Sales

ST SC Team

This level of granularity is useful for Tasks that contain sensitive information and ensures that tasks are visible only to those who need to work on them, optimizing efficiency and promoting seamless teamwork.