What are Organizations?

Christopher Nadeau - 2023-09-08 - Reacties (0) - CRM

What are Organizations? And how can you use the Organization feature in Deskpro?

At the lowest level, an Organization in Deskpro is a way to group Users associated with the same company, community, or project. We use the word "Organization", but it can be useful for grouping other kinds of users too.

The most useful feature of Organizations is the fact that individual tickets linked to different Users can all belong to or be associated with an Organization.

For example, if you handle multiple Users from the same client, you add each user into an Organization. After you've done that, you can easily search for all the tickets associated with that Organization and view all the tickets made by its Users on the Organization Profile.

On an Organization Profile, Agents can add information to centralize everything they need to work on their support tickets.

The built-in fields that you can use to store information about Organizations are:

- **Summary**
- **Contact Information**
  - Phone, Email, Social Media, Website, Address, and more.
- **Core Properties**
  - Date the Organization was created, the Usergroups the Organization belongs to, and more.
- **Hierarchy**
  - You can track subsidiary companies by linking Parent and Child Organizations.
- **Associated Domains**
  - Set an Email Domain Association, so any new Users that sign up for your helpdesk are automatically linked to the Organization.
- **Members**
  - A list of all the Users in your helpdesk who are associated with the Organization.

Plus, Admins can create unlimited custom fields to store information specific to your business on each profile.

You can also take advantage of the Permissions system by linking Organizations to Usergroups, so any Users associated with the Organization are automatically granted the same permissions. This lets you then manage the permissions for all the Users at the same time and lets you use the permissions to interact with other features such as your Help Center. For example, you can create a Usergroup for a specific Organization that gives all their Users access to specific Guides or Knowledgebase Articles.

Another part of the Organizations system is the concept of **Organization Roles**, which allow you to sub-group members of an Organization.

For example, you can set specific Users to be an Organization Manager. Once a User is set as a Manager this gives them access to all the tickets created by other members of the Organization, plus you can use this role to create automations in the helpdesk, such as escalating requests that are submitted by an Organization Manager.

Similarly, setting Organization Roles assists Agents when searching for Users or Tickets. You might want to search for "all tickets submitted from Organization X by one of the Organization Managers". Doing this kind of search is just a few clicks away.

You can take a more in-depth look into using and managing Organizations in your helpdesk in our Agent and Admin Guides.

Gerelateerde inhoud

- User and Organization Fields
- Introduction to Usergroups