Option to display additional user/organization details within the new ticket form when an agent is creating a new ticket Collecting Feedback

- Romanita Courson
- **Forum name:** #Feature Request

When creating a new ticket in the agent interface, after selecting a user, some user information is displayed (email address, phone number and name).

We'd like to choose additional fields which display here.
We have to verify information on the organization level first for some of our clients, and if the organization name was listed so that we could click on it to view the organization profile more quickly before actually creating the ticket, that would be helpful (e.g. to review the summary notes for the organization the user is a member of).

Comments (2)

Zsolt Kiss

4 года назад

Yes for insatance if an organisation has a label like "advance payment only" it should be shown at the ticket creation instead of checking always in the crm previously.

Douglas Martin

2 года назад

I also could use the functionality of displaying certain information about the organization on tickets. We miss a lot of important information when we are busy as it is cumbersome to always be opening the organization tab to view all the organization info. If we could pull some of that over to the ticket using custom fields or some other option it would help us immensely.