

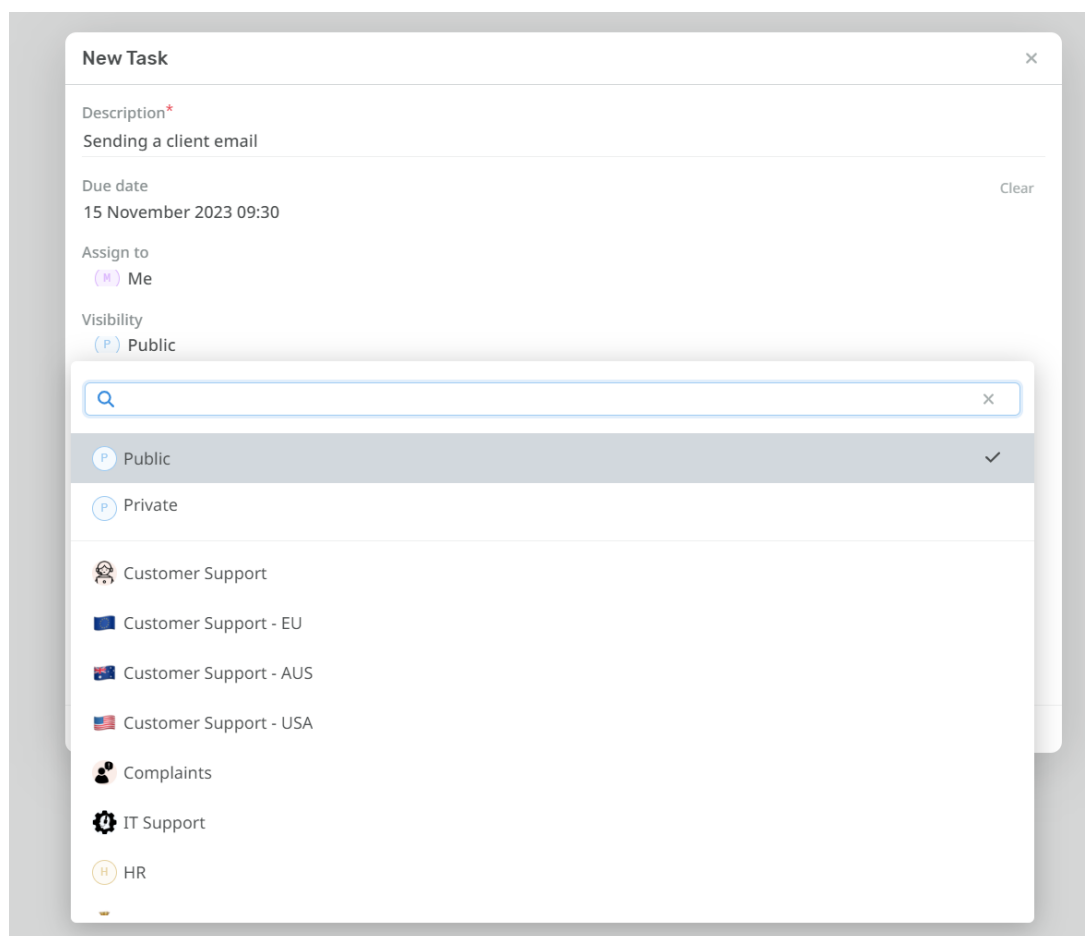
How do I make tasks visible to certain agents, teams, or departments?

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 content area includes a 'Description*' field with the text 'Sending a client email', a 'Due date' field with the text '15 November 2023 09:30' and a 'Clear' button, an 'Assign to' field with a dropdown menu showing 'Me', and a 'Visibility' field with a dropdown menu showing 'Public'. The 'Visibility' dropdown menu is open, showing a search bar and a list of options: 'Public' (selected with a checkmark), 'Private', 'Customer Support', 'Customer Support - EU', 'Customer Support - AUS', 'Customer Support - USA', 'Complaints', 'IT Support', and '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*' (with a placeholder 'Add Description'), 'Due date' (with a placeholder 'Choose Date'), and 'Assign to'. The 'Assign to' field is open, displaying a list of agents. The list includes: Joell, John Watson, Kimberley Wilson (marked 'NOW'), Langdale Pike, Lara Proud, Letitia Hudson, Matt Wray (marked 'NOW'), Mycroft Holmes, Sherlock Holmes (highlighted with a checkmark), and Shinwell Johnson. The form has a close button (X) in the top right corner.

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.