



# Zendesk Groups / Roles

## INFORMATION

This document contains more information about the Zendesk Roles and Groups as we discussed during our call.

In the table below you will find more information about the Agents, Groups, and Roles. I have created two Custom Roles, "CR - Own Group Tickets" and "CR - Own Group Tickets Including Private Groups". The first role allows agents to see only tickets from their own group and public groups. If they are **not** part of this public group and are not added as a group in the View, they still have the possibility to access the tickets via the URL or via the Customer Profile. The second role allows agents to see all tickets including tickets from a private group. The agents with the first role are not able to see tickets from private groups via the URL or via the Customer Profile.

Information about Agents / Groups / Roles			
Agent	Group	Role	Note
Felix	Technical Support (Public Group)	CR - Own Group Tickets	Felix needs to look into <b>Group:</b> Service & Rep tickets
Anna	Service & Rep (Public Group)	CR - Own Group Tickets	Anna needs to look into <b>Group:</b> Logistics and Warranty tickets
Steve	HR (Private Group)	CR - Own Group Tickets Including Private Groups	Steve needs to look into <b>Group:</b> Technical Support

You need to create Views in order to make it easier for your agents to see tickets from other Groups.

Information about Views			
View	Who Has Access	Condition	
All Technical Support Tickets	Technical Support HR	Group = Technical Support	
All Service & Rep Tickets	Service & Rep Technical Support	Group = Service & Rep	
All Logistics Tickets	Service & Rep Logistics	Group = Logistics	
All Warranty Tickets	Service & Rep Warranty	Group = Warranty	
All HR Tickets	HR Technical Support Service & Rep	Group = HR	

Here are some screenshots from the Admin Center (configuration) and the Agents:

Home

Recently viewed

people

Clear

People

Team

Team members

8 team members

Bulk manage

Team member	Product access	Support role	Sell role	Last sign-in
<div><div></div><div>Anna Collins</div><div>kisan.z3n+anna@gmail.com</div></div>	Support, Guide, Talk, Chat	CR - Own Group Tickets	No role	May 30, 2023
<div><div></div><div>Felix</div><div>kisan.z3n+felix@gmail.com</div></div>	Support, Guide	CR - Own Group Tickets	No role	May 30, 2023
<div><div></div><div>Steve Collins</div><div>kisan.z3n+steve@gmail.com</div></div>	Support, Guide	CR - Own Group Tickets including Private Groups	No role	May 30, 2023

Agents with their assigned roles

Home

Recently viewed

Search Admin Center

Account

People

Team

Team members

Roles

Groups

Configuration

User fields

Organization fields

Events

Profiles

End users

Tags

Bulk actions

People > Team > Roles > CR - Own Group Tickets

CR - Own Group Tickets Custom

[Learn about role permissions](#)

Name\* (required)

CR - Own Group Tickets

Description

Permissions

Tickets

Choose the ticket permissions for this role.

Tickets they can access

☐ Assigned to them

☐ Requested by end users in their organizations

☐ Within their groups

☒ Within their groups and all public groups

☒ Assign tickets to any group

Can assign tickets to groups they don't belong to, including private groups.

☐ All, including those in private groups

The custom role “CR - Own Group Tickets”

Home

Recently viewed

Search Admin Center

Account

People

Team

Team members

Roles

Groups

Configuration

User fields

Organization fields

Events

Profiles

End users

Tags

People > Team > Roles > CR - Own Group Tickets Including Private Groups

CR - Own Group Tickets Including Private Groups Custom

[Learn about role permissions](#)

Name\* (required)

CR - Own Group Tickets Including Private Groups

Description

Permissions

Tickets

Choose the ticket permissions for this role.

Tickets they can access

☐ Assigned to them

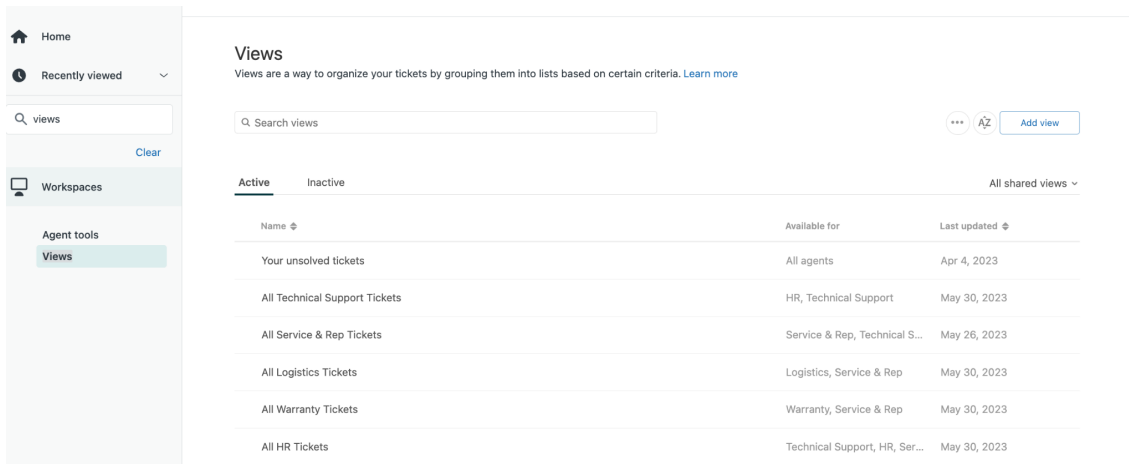
☐ Requested by end users in their organizations

☐ Within their groups

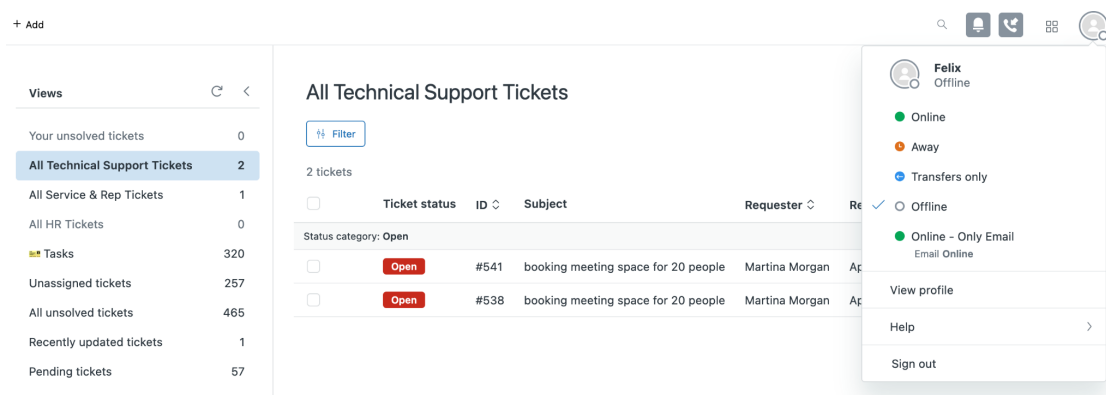
☐ Within their groups and all public groups

☒ All, including those in private groups

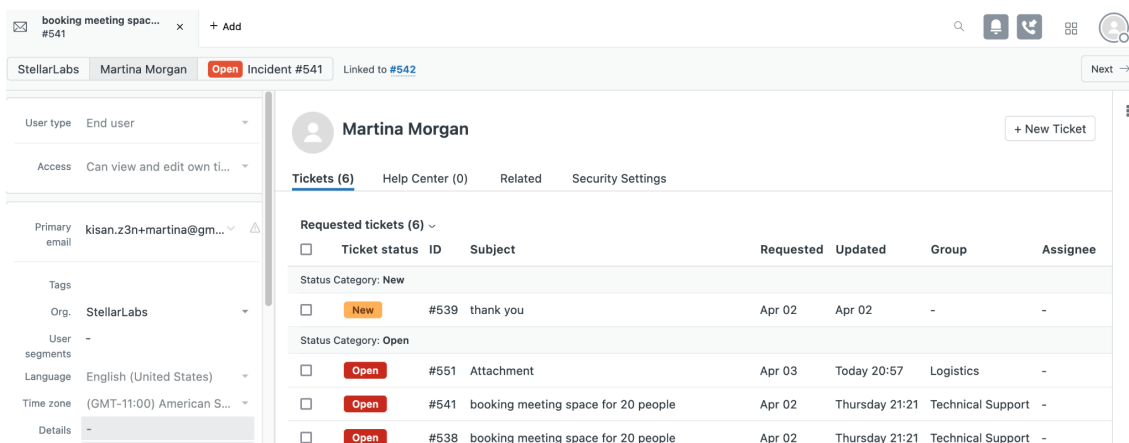
The custom role “CR - Own Group Tickets Including Private Groups”



The views and for which groups they are available.



This is the view from Felix and you can see that this agent has access to the views “Technical Support” and “Service & Rep”. There are two tickets available from the requester “Martina Morgan” in the Technical Support view but there are also other tickets from Martina Morgan. One example ticket from this requester is assigned to the group “Logistics” but Felix doesn’t have access to this ticket in the overviews. He still can access this ticket via the profile (see other screenshot below).



The tickets are accessible through the customer profile which are available in a Public Group.

**Note:** If you don’t want to allow this, you need to create another custom role with the option to only give them access to their own groups without giving them access to the Public Groups.

+ Add

Views

- Your unsolved tickets 2
- All Service & Rep Tickets 1
- All Logistics Tickets 11
- All Warranty Tickets 43
- All HR Tickets 0
- Tasks 320
- Unassigned tickets 257
- All unsolved tickets 465
- Recently updated tickets 1
- Pending tickets 57

### All Logistics Tickets

Filter

11 tickets

	Ticket status	ID	Subject	Requester
Status category: New				
<input type="checkbox"/>	New	#524	Outstanding question about 2 additional rooms requeste...	Ge
Status category: Open				
<input type="checkbox"/>	Open	#551	Attachment	Ma
<input type="checkbox"/>	Open	#548	Incoming call from John Doe	Ar
<input type="checkbox"/>	Open	#544	Outstanding question about 2 additional rooms requeste...	Ge

Anna Collins  
Offline

- Online
- Away
- Transfers only
- Offline
- Online - Only Email
- Email Online
- Messaging Offline
- Talk Offline
- View profile
- Help
- Sign out

This is the view from Anna and she is able to see tickets in her view from the Groups: Service & Rep, Logistics and Warranty. She is also assigned as a group in the view for HR Tickets but she can't see these tickets because this is a private group.

+ Add

Views

- Your unsolved tickets 13
- All Technical Support Tickets 2
- All HR Tickets 6
- Tasks 326
- Unassigned tickets 258
- All unsolved tickets 471
- Recently updated tickets 6
- Pending tickets 57
- All Tickets (not closed) 472
- Unsolved tickets in your groups 15
- Urgent Tickets 1
- CSAT 2

### All HR Tickets

Filter

6 tickets

	Ticket status	ID	Subject	Requester	Requester
Status category: Open					
<input type="checkbox"/>	Open	#217	Commission?	Martina Morgan	Aug 02, 2022
<input type="checkbox"/>	Open	#221	Commission Agree	Rita Carter	Aug 02, 2022
<input type="checkbox"/>	Open	#220	Commission not agree	Rita Carter	Aug 02, 2022
<input type="checkbox"/>	Open	#219	Commission Agree Use Case	Rita Carter	Aug 02, 2022
<input type="checkbox"/>	Open	#218	Commission Agree	Rita Carter	Aug 02, 2022
<input type="checkbox"/>	Open	#231	commission	Steve Collins	Aug 08, 2022

Steve Collins  
Offline

- Online
- Away
- Transfers only
- Offline
- Online - Only Email
- Email Online
- View profile
- Help
- Sign out

This is the view from Steve and he is able to see tickets from HR (private group) and all tickets from the Technical Support group. He also has the possibility to see all other tickets if he search for something specific.