

Best practices for new users



20/11/23 V1.0 CS

Enabling notifications

In-app notifications

When there is new activity in a Taskize Bubble or unassigned requests, you'll be able to see a highlighted number. It refers to the number of activities either in the Bubble/business unit or bell icon.

Browser notifications

Browser notifications provide you with alerts of key Bubble events and session information. You can set these up within your browser.

Email notifications

When you're offline, you'll received 'missed activity emails' alerting you to Bubble activity while you've been away. They'll prompt you to sign in and view the missed activity.

Learn more about managing notifications

I Terminology

Taskize Bubbles have different states:

In progress – an issue is being actively worked on.

- Pending an issue is currently on hold. For example, while waiting for further information..
- **Resolved** all counterparties are satisfied that no further action is needed.
- Cancelled a Bubble is no longer needed.

Finalised – a Bubble's issue state has been set to resolved or cancelled. The Bubble will move into a finished state, before eventually becoming finalised after a certain time (usually 60 hours). You can't reopen finalised Bubbles.



I Tips and tricks

Can't find an old Bubble?

Go into 'My Bubbles' and select the 'include finalised' tick box option (bottom right of the screen). This will bring up all previous Bubbles you have worked on.

Has my counterparty left the Bubble before it has been resolved?

To find out if this is the case, if they have left the Bubble it will say (FINISHED) next to their name. Click the refresh icon alongside their name and this will provide a prompt to invite them back into the Bubble.

How do I transfer a Bubble to someone else?

If you need to transfer a Bubble, you must invite another person in to it **before** you leave the Bubble. Invite a colleague by using the person icon in the Bubble card.

How do I know if my Bubble has been seen?

Once you've entered a Bubble, it's best practice to respond immediately before investigating the issue, so your counterparty knows you've received it. Something simple like 'Received and looking in to it' will do.

Has a new issue occurred which relates to a previous Bubble?

For audit purposes, it's best practice to raise a new Bubble for each new issue. If the inquiry relates to a previous issue, you can include the previous Bubble's 6-digit identifier for your counterparty to refer to.

What can your organisation's admins help with?

Your organisation's administrator can handle most of the platform management, including the following:

- Creating new user accounts
- Re-enabling previously disabled accounts
- Amending user email addresses
- Creating new Business Unit
- Amending Taskize 'time out' period
- Downloading archived files



Learn more about admin functions

Contacting support

To speak to a member of Taskize support, create a Bubble, invite Taskize Ltd, and select the IT Support business unit.

Pendroj Create Bubble In Pendroj In Pendroj <td< th=""><th></th><th>In Progress</th><th>+ New Bubb</th><th>Search</th><th></th><th></th><th></th><th></th><th>Colleague</th><th>s Notifications</th><th>😑 Emma Co</th></td<>		In Progress	+ New Bubb	Search					Colleague	s Notifications	😑 Emma Co
Image: Construction Template Semplates southabe Image: Construction My Organization* Tasking Image: Construction Tasking Duniessigner Image: Construction Tasking			Create Bubble							+	×
Customer My Organization* Texture My Organization* Texture My Organization* Texture My Organization* My Organiza	LES		Template	5 templates available	- 6						
I blacket Topic* Help readed I blacket Fopic* Help readed I blacket Select I blacket Add more Andrbates Add more Andrbates Add more Andrbates Add more Cancel Creats						E					1
Image: Content of the content of t	ARD		My Organisation *			Business Unit	Taskize Support	- My Function	IT Support		
Add Parties Solect			Topic *	Help needed							
Caccel Cacce			Add Parties	Select	~						1 H.
Attributes Add Attribute				C Add more							
n For more information, see Help.		Copport	Attributes	Add Attribute	~						
For more information, see Help. Cancel Create											
Crate				m, see Help.							
			Cancel							Create	
	NOK								Include finalized		
			Archive Trans								
			Archive Trans	sfer Leave Resume	Add Participant			0 Bubbles	TRUCCE INTENSED		

