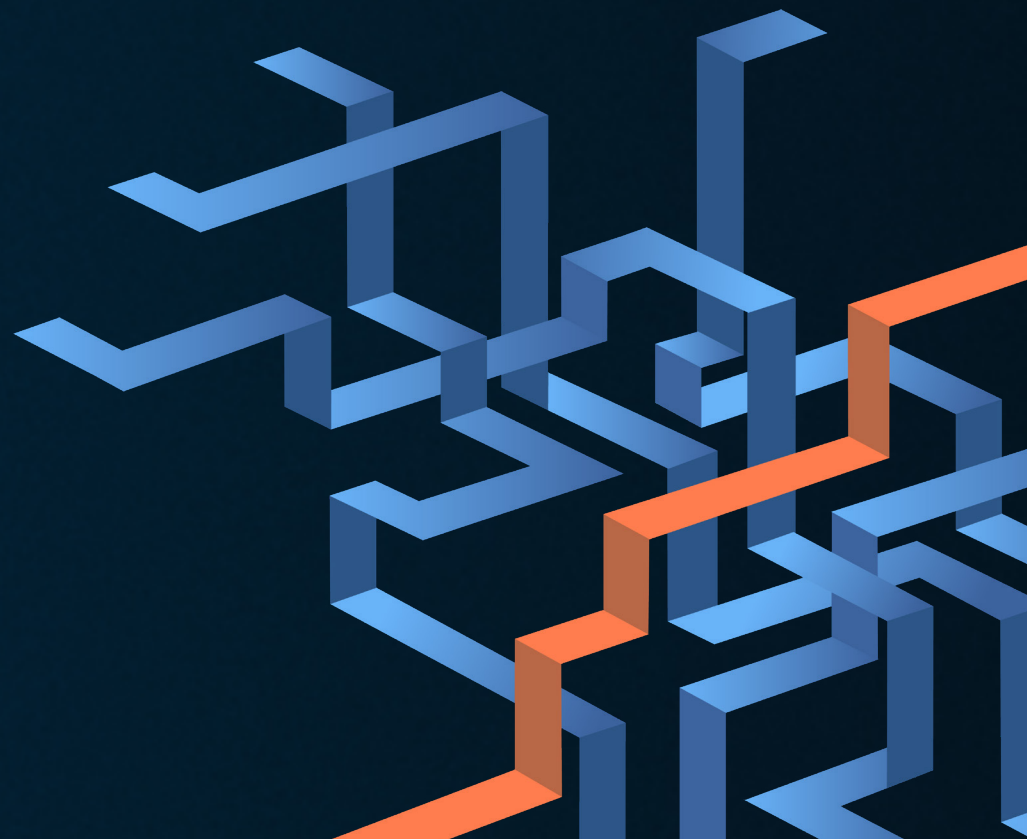


Best practices for new users



| 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](#)



| 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.

[Learn more about Bubble states](#)



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.

