FluentBoards Integration with FluentSupport

Integrations · https://fluentboards.com/docs/fluentboards-integration-with-fluentsupport/

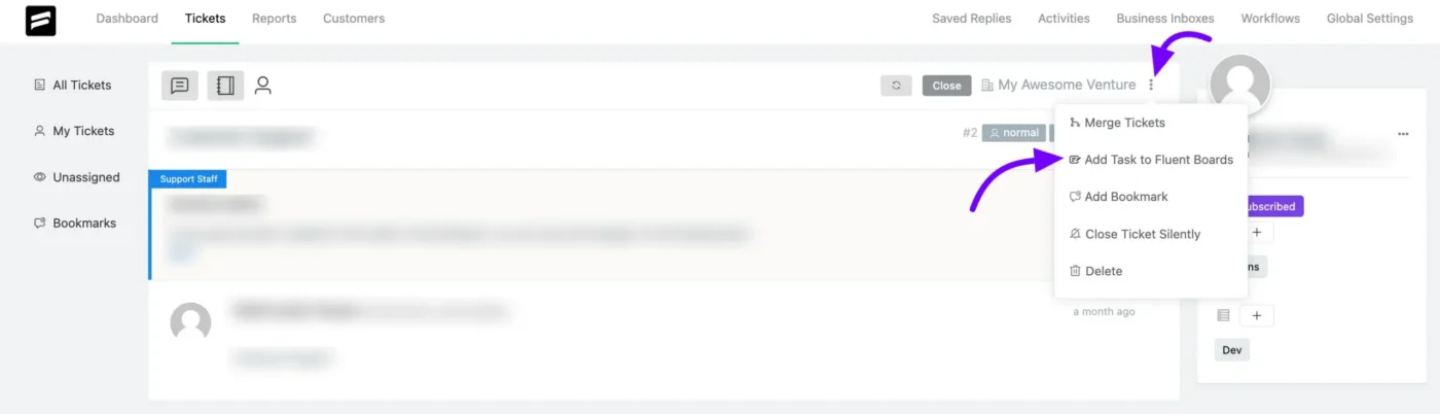
You can create a task directly from your Fluent Support Tickets. If any Tickets come in your Fluent Support your support agent can add that Tickect as a task on your Fluent Boards.

The integration of Fluent Board and Fluent Support is straightforward. You just need to install both plugins on your site. In this article, we will demonstrate the whole thing.

Adding Task from Fluent Support Ticket

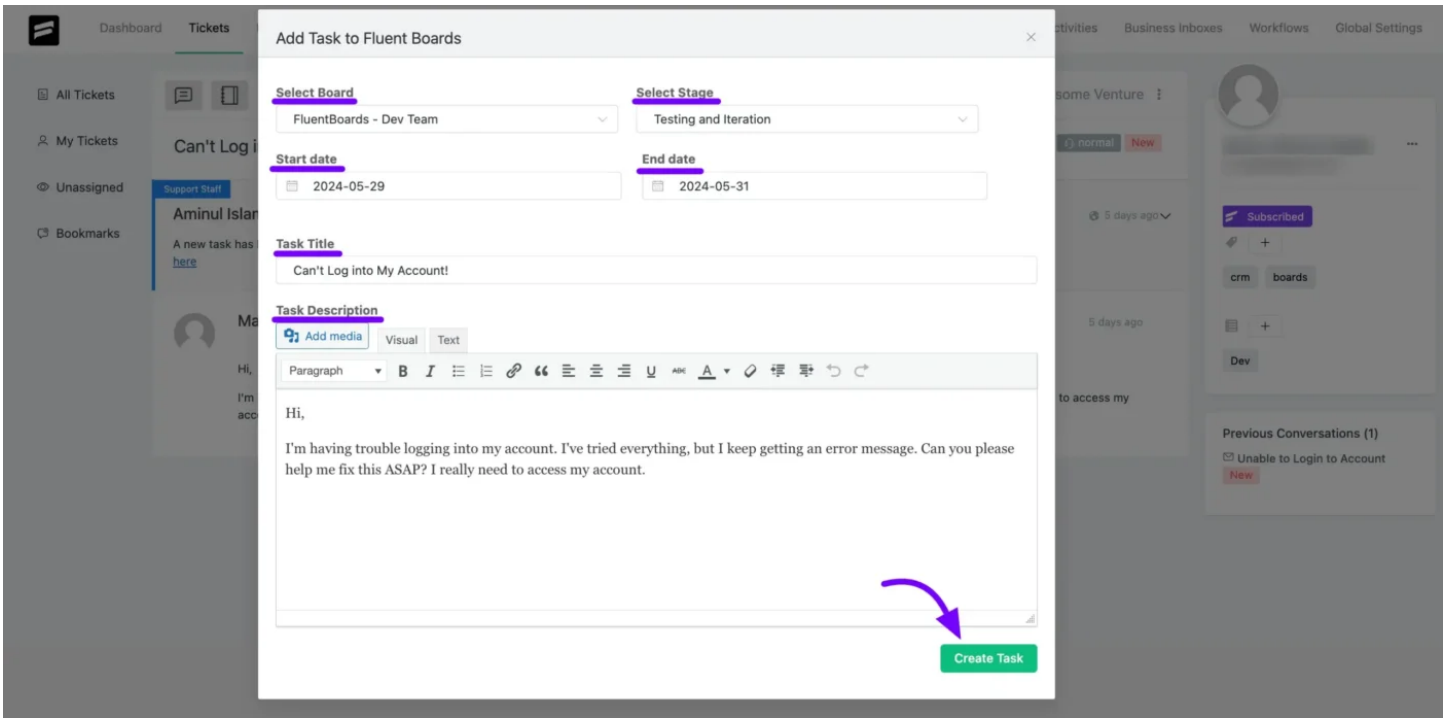
Go to the Fluent Support Tickets and then open the specific ticket you want to add to your FluentBoards task.

In your ticket, you will see a three-dot button on the top right corner of your ticket. Now click on that **three-dot** button and you will see **Add Task to FluentBoards** select it.



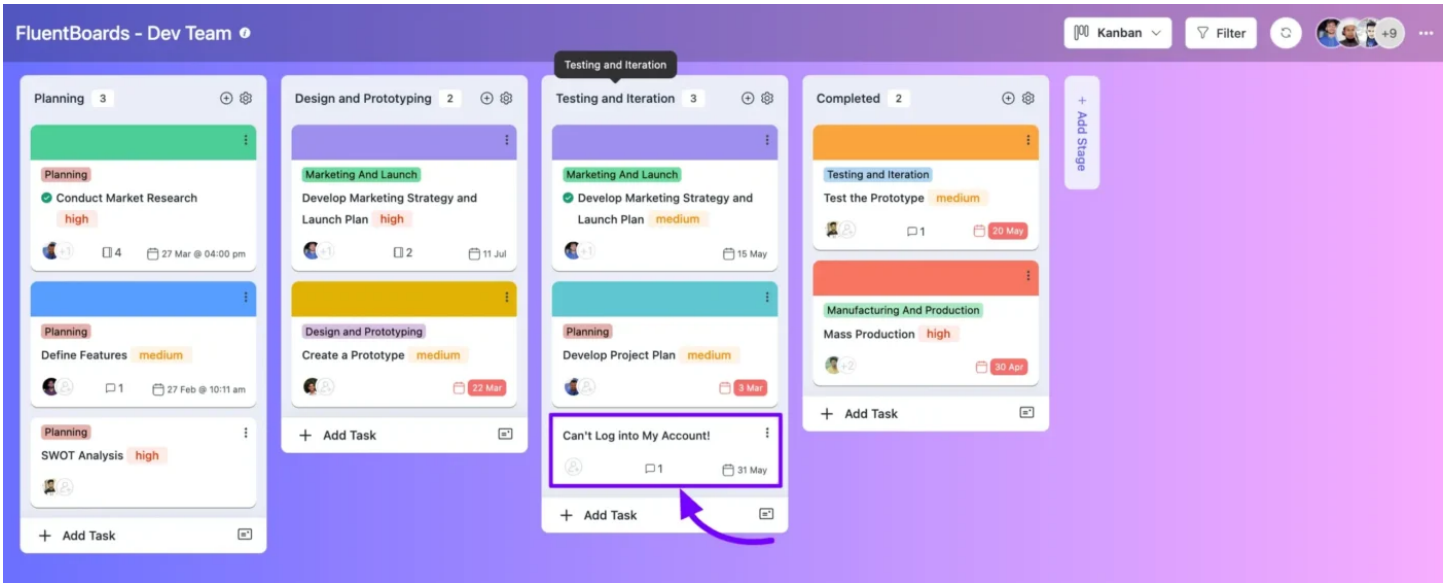
Your **Task Title** will be automatically chosen from your Ticket subject field and the Ticket description will be added as a task description.

Here, you'll find the option to choose the **Board**, **Stage**, **and Date** from the **Dropdown** menu, and the task will automatically be added to the bottom of that stage. Fluent Support Agents can only view the boards to which they have access.



> If the ticket opener is a FluentCRM User, they'll be automatically linked to the task as an Associated CRM contact.

If you need to make further changes to the task, simply open it from your FluentBoards. From there, you can add assignees, set priorities, add labels, adjust dates, and make any other necessary adjustments.



This outlines all the options available to integrate your Fluent support with Fluent Boards. If you have any additional questions regarding this integration, don't hesitate to reach out to us.