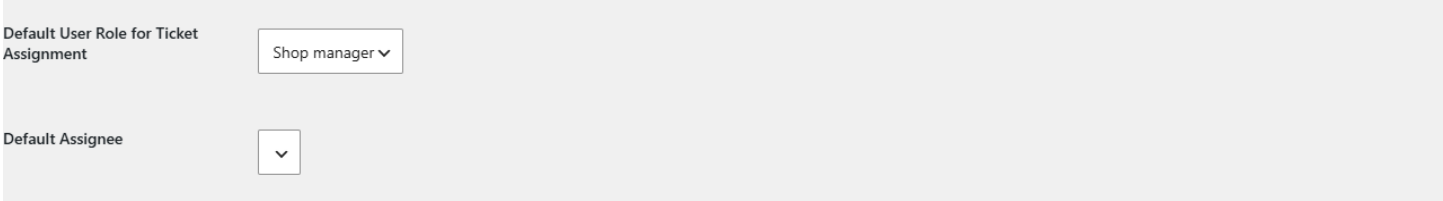
How to Assign WooCommerce Support Tickets to Agents Automatically

How to · https://wpfactory.com/docs/helpdesk-assign-tickets-to-agents/

To assign WooCommerce support tickets to agents automatically, go to **WPFactory > Support Tickets > Settings** (also under **Support Tickets > Settings**) in Helpdesk Support Ticketing System for WooCommerce, choose your agents' role and a **Default Assignee**, then optionally give each ticket subject its own assignee.



How assignment works

When a customer submits a ticket, Helpdesk decides who owns it in this order:

1. If the chosen **subject** has an **Assignee**, the ticket is assigned to that person.
2. Otherwise the **Default Assignee** from the settings is treated as the owner. The ticket list and ticket screen show that person in the Assignee field, and assignee emails go to them.
3. You can reassign any ticket by hand from the ticket screen at any time.

How to set up automatic assignment

1. Make sure your support agents have first and last names in their WordPress profiles. The assignee dropdowns list users by first and last name, so users without names show as blank options.
2. Go to **WPFactory > Support Tickets** and click the **Settings** tab (administrators only).
3. In **Default User Role for Ticket Assignment**, select the role your agents have, for example Shop manager. The form is submitted in the background (which also saves the current settings) and the **Default Assignee** list updates to show users with that role.

4. In **Default Assignee**, pick the person who should receive tickets that no subject rule covers.
5. Click **Save Changes**. The selected role now has access to the Support Tickets screens.
6. To route by topic, open the **Subject** tab, edit a subject (or add a new one), choose a user in the **Assignee** field and save. The Subject list shows each subject's assignee in its own column.

Give your agents access to the ticket screens

Helpdesk uses a custom capability, `stsw_tickets`, to control who sees the Support Tickets menu:

- The Administrator role receives it when the plugin is activated.
- The role saved in **Default User Role for Ticket Assignment** receives it when you save the settings. If you later pick a different role, the previous role loses it.

Agents with access see the **Dashboard**, **Tickets**, **Priorities** and **Subject** tabs. Only administrators see **Settings**. Tickets use WordPress page permissions, so the agent role must also be able to edit pages (Shop manager and Editor can, Customer and Subscriber cannot).

> **Note:** the role field always shows a role, even before you choose one. Check it before you click Save Changes on the Settings tab, because whatever role is shown receives access to the ticket screens.

Reassign a ticket manually

1. Open the ticket from the **Tickets** tab.
2. In the **Assign to User** box, choose a role in **Select a Role**. The **Select a User** list reloads with users of that role.
3. Choose the user and click **Update**.

What agents see on the front end

An agent who opens the My Account Tickets tab (or a page with `[stsw_user_tickets]`) sees the tickets assigned to them, not every ticket. Administrators see all tickets there.

FAQ

Does the Default Assignee receive email for new tickets?

Yes, when **Notify Assignee by Email** is ticked on the Notifications tab. The email goes to the subject assignee if there is one, otherwise to the Default Assignee.

Can I assign tickets to users with different roles?

Yes, manually. In the ticket's **Assign to User** box, pick any role first and then the user. Automatic assignment through the settings uses one role, while subject assignees can be any user.

Why is the Default Assignee list empty?

No user has the selected role yet, or the page did not reload after you changed the role. Pick the role again, wait for the page to refresh, then choose the user.

Why can my agent see the menu but not open tickets?

Their role has the Helpdesk capability but cannot edit pages. Use a role such as Shop manager or Editor for your agents.



HELPDESK SUPPORT TICKETING SYSTEM FOR WOOCOMMERCE

Automatic assignment is part of Helpdesk Support Ticketing System for WooCommerce Pro. See also how to set up ticket subjects and priorities.

View plugin →

Need a hand? Our team answers every ticket on the Helpdesk support forum.

Related articles

- How to Configure WooCommerce Support Ticket Email Notifications
- How to Allow File Attachments on WooCommerce Support Tickets
- How to Set Up Support Ticket Subjects and Priorities
- How to Reply to and Manage WooCommerce Support Tickets
- How to Let WooCommerce Customers Open Support Tickets