FluentBoards Integrations

Integrations · https://fluentsupport.com/docs/fluentboards-integrations/

FluentBoards integration with **Fluent Support** allows you to create a task directly from your Fluent Support **Tickets** (i.e., if any Tickets come in your Fluent Support your support agent can add that Tickect as a task on your Fluent Boards).

This article will guide you through integrating **FluentBoards** with **Fluent Support**.

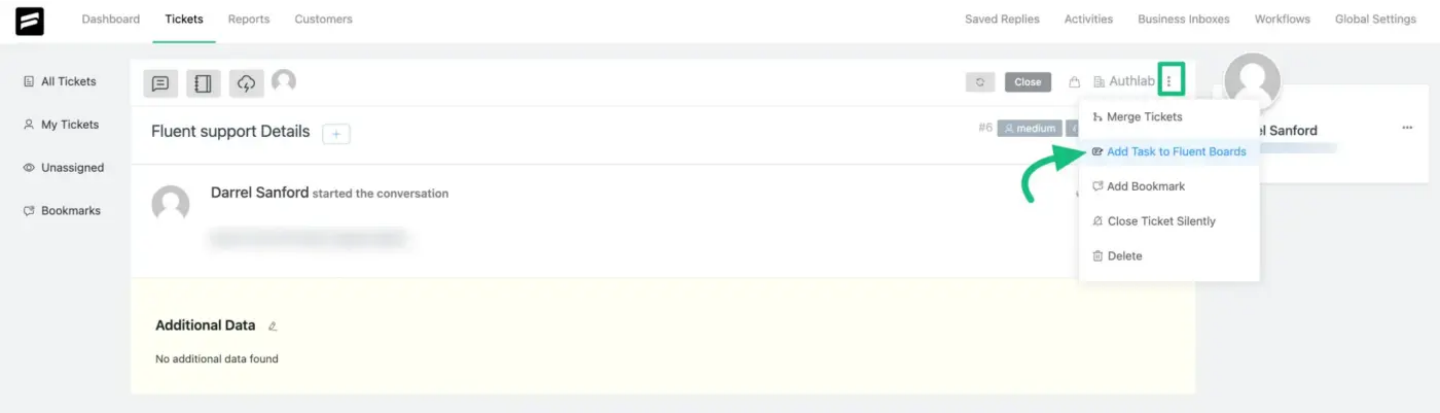
> Remember, you do not need to integrate the **FluentBoards** plugin manually with **Fluent Support**; it happens automatically if the both plugins are already installed on your site.

Adding Task from Fluent Support Ticket

To learn how to integrate FluentBoards into Fluent Support, follow the steps with the screenshots below —

Go to the **Tickets** from the **Fluent Support Dashboard** and then open the specific ticket you want to add to your **FluentBoards**' **Task**. Now, click on **Add Task to Fluent Boards** from the **Three-Dot** button on the top right corner of your ticket.

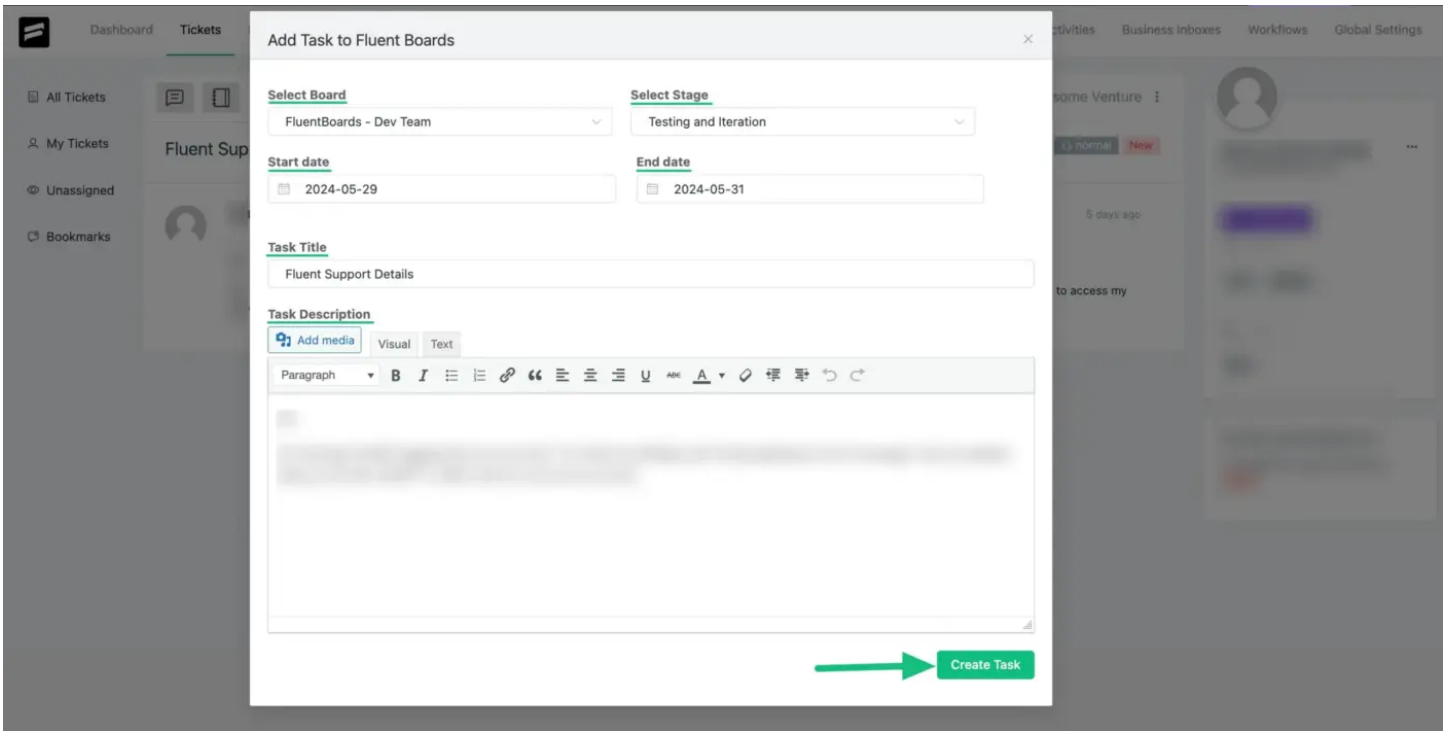
And, a popup page will appear for adding this ticket to your Fluent Boards!



In the popup page, you'll find the option to choose the **Board** and **Stage** 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.

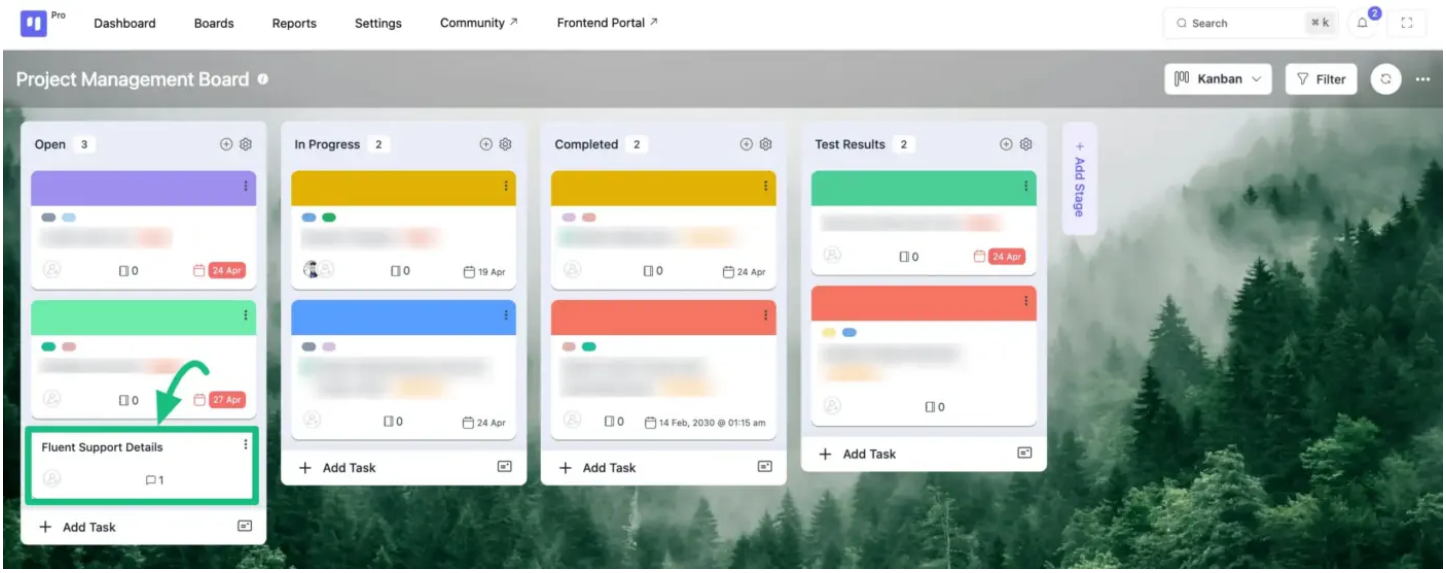
Here, you can set the **Starting** and **Ending Dates** for the task. Also, your **Task Title** will be automatically added from your Tickect's **Subject** field and the **Task Description** from the **Ticket Description** field.

Once you are done, click the **Create Task** button and the ticket will be added as a new task in your Fluent Boards.



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.

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



This is how the integration of **FluentBoards** with **Fluent Support** works!
If you have any further questions, concerns, or suggestions, please do not hesitate to contact our **@support team**. Thank you.