

Using Deskpro > Admin > Business Rules > Automatically add Tasks to < قاعدة المعلومات Tickets with Triggers

## Automatically add Tasks to Tickets with Triggers

Business Rules - (٠) تعليقات - Lara Proud - 2023-08-31

If you have specific Tickets that always require the same actions to be completed, it can be .useful to add these actions as Tasks on the Ticket

You can automate this by using a New Ticket Trigger so that every time the criteria are .matched the Tasks will be added to the Ticket for Agents working on it to see

## **Create the Trigger**

.Go to Admin > Business Rules > Triggers. Under New Ticket Triggers hit + New

For this example, I'm going to use the scenario that you want to apply a Task checklist to .Tickets that are raised by your HR department when a new starter joins your company

Firstly, you'll need to add a Title and Specify which creation method you want the Trigger to :apply to in Events

_									
Ac	Add: New Trigger								
1	Properties								
Title*									
N	New Starter Checklist								
Thi	This title will be used throughout the admin interface to refer to this Trigger.								
Enabled									
2	Event								
~	(2) Event								
	Event vicket vic								
	) By User								
	Help Center		Website Widget		$\checkmark$	API			
~	Ticket Form Widget	$\checkmark$	Email		$\leq$	Phone			
	Messenger		SMS			WhatsApp			
	Twitter		Trust Pilot						
By Agent									
	Agent interface	$\checkmark$	API		$\checkmark$	Email			
	Phone Call	$\checkmark$	Mobile apps			Forwarding			
	Messenger		SMS			WhatsApp			
	Twitter		Trust Pilot						

## Criteria

We'll need to identify common properties shared by the types of tickets to add our tasks to,

such as a Ticket that is created that contains the subject line "New Starter" and the ."Department "HR

3 Criteria										
The criteria se	ction is a list of terms that m	ust match before the actions are applied to t	the Ticket.							
When	the following conditions are m	et:		Î						
	Email subject	✓ is		• +						
And	Department	✓ is	* (*) HR ×	•						

## Actions

In the Actions section, we can add the Tasks that we want to be created with each ticket .that matches the Criteria we have created

In the example below, we have added a couple of typical jobs you may have to do to .prepare for new starters

4 Action		all of the criteria pass.			
Then	the following act				
	Create task	•			
	Task title	Set up laptop			
	Due date	Relative time 💌			
↑ ↓		1 Week(s) later 👻	+		
	Public	O			
	Creator	Current agent 💌			
	Assignee	C Current agent			
	Link to ticket	٥			
	Create task	•			
	Task title	Get Employee pass set up			
		Relative time +			
<b>†</b>	Due date	1 Week(s) later •	+		
	Public	0			
	Creator	Current agent *			
	Assignee	C Current agent			
	Link to ticket	C			

:You are able to create as many Tasks as you require, and you define

Task Title •

Due Date •

Visibility •

```
Task Creator •
Task Assignee •
And if it is linked to the Ticket •
```

Click **Create** and this Trigger will now apply for any Tickets that are created that match the Criteria. So that when an agent accesses the Ticket they will be able to see any Tasks linked :to the Ticket from the Tasks tab

New Starter						
(i) (s) (c <sup>1</sup> ) (c)	C <sup>2</sup>					
🛛 🔲 🔇	Tasks					
Tasks +						
Due (2)						
O Set up laptop						
🔇   Public   투 Add	7 days					
O Get Employee pass set up						
Public   Add 7 days						