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Automatically add Tasks to Tickets with Triggers

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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:

Add: New Trigger✕

① **Properties**

Title*

This title will be used throughout the admin interface to refer to this Trigger.

Enabled

② **Event**

Event

By User

<input checked="" type="checkbox"/> Help Center	<input checked="" type="checkbox"/> Website Widget	<input checked="" type="checkbox"/> API
<input checked="" type="checkbox"/> Ticket Form Widget	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Phone
<input checked="" type="checkbox"/> Messenger	<input type="checkbox"/> SMS	<input type="checkbox"/> WhatsApp
<input type="checkbox"/> Twitter	<input type="checkbox"/> Trust Pilot	

By Agent



<input checked="" type="checkbox"/> Agent interface	<input checked="" type="checkbox"/> API	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Phone Call	<input checked="" type="checkbox"/> Mobile apps	<input type="checkbox"/> Forwarding
<input checked="" type="checkbox"/> Messenger	<input type="checkbox"/> SMS	<input type="checkbox"/> WhatsApp
<input type="checkbox"/> Twitter	<input type="checkbox"/> 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".

New Starter

 444 | [+ Add](#)





     

[Tasks](#)

Tasks +

Due (2)

- Set up laptop
 | Public |  Add 7 days
- Get Employee pass set up
 | Public |  Add 7 days