

How do I make a reusable checklist of things to do within a ticket?

Ben Henley - 2023-10-03 - Kommentare (0) - Deskpro Legacy

Question:

We have some tickets which require a long series of subtasks each time they are created: for example, when we get ready for a new employee, we need to make sure that 10 different steps have been done. What's the best way to handle that in Deskpro?

Answer:

1. In **Admin > Tickets > Departments**, create a new department for this type of ticket e.g. "New Employees".
2. In the Layout tab for the new department, select **Use Custom Form Layout**.
3. In **Tickets > Fields**, create a new custom Toggle field for each step you need to track. Add it only to the layout for the department you created. You will probably want to make it an agents-only field.

| Field Type | Toggle (On/Off) |
|------------------|---|
| Enabled | <input checked="" type="checkbox"/> Enable this field |
| Layouts | <p>Select which layouts this field should be added to. You can find the display order of fields) from the ticket department section.</p> <p>Agent Layouts</p> <div> <input type="checkbox"/> Default Layout <input checked="" type="checkbox"/> New Employees </div> |
| Title * | Signed network usage policy agreement |
| Description | Has employee read and agreed the acceptable usage policy for company networks? |
| Checkbox Label | Yes |
| Default state | <input type="checkbox"/> Checked by default |
| User Validation | <input checked="" type="radio"/> No user validation <input type="radio"/> Require the user to check the checkbox |
| Agent Validation | <input checked="" type="radio"/> No agent validation <input type="radio"/> Require the agent to check the checkbox |
| Agent Only Field | <input checked="" type="checkbox"/> Only show this field to agents |

Save

4. In **Tickets > Departments > Layout**, make sure that the toggle fields are added to the Agent Form layout for your new department but not any others. Click on the little gear icon for each field, and uncheck **Only show when there is a value**.

PropertiesPermissionsLayoutWebsite Embed

Use Default Form LayoutUse Custom Form Layout for "New Employees"

This is a custom layout that applies only to this department. Any changes you make to this layout will not affect an

User FormAgent Form

The agent ticket form has a few fixed fields such as subject, message, department and user properties. However you can add and arrange additional fields any way you want.

Account provisioned

Signed network usage policy agreement

New ID card printed

Ticket Fields ·

Product

Category

Workflow

Priority

Asset ID

Best time to call

Budget (\$)

5. Now when you get a ticket in that department, you can track all the subtasks, and press 'Save' for any changes made.

+ ADDNew Employee

ID: 129New Employee request

Newemployee (newemployee@example.net)Add CC

New EmployeesAwaiting Agent1

PROPERTIESTASKS (0)SLAS■■■■■■BILLING & TIME LOGSALESFORCE (0)

CancelSave

Agent · UnassignTeam · Assign to Primary TeamFollowers · Add Me

Simon Hall

None

Add a follower

Language:

English

Account provisioned: ☒ Yes

Signed network usage policy agreement: ☐ Yes

New ID card printed: ☐ Yes

Labels: Add a label