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Creating Triggers for Auto-Triaging Tickets in Deskpro based on keywords

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Triggers are a powerful tool for auto-triaging incoming tickets by assigning them to specific queues, departments, teams, or agents based on predefined criteria.

Step-by-Step Guide:

Navigate to Trigger Setup:

- Go to Admin > Business Rules > Triggers > + New Trigger

Define the Trigger Properties:

- Give the trigger a meaningful name that you can easily reference. This name will help you find and manage the trigger within Deskpro.

1 Properties

Title*

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

Enabled

Select the Event:

- For this example, we will choose the event "New ticket."

2 Event

Event

New ticket

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 | <input type="checkbox"/> Facebook |
| <input type="checkbox"/> Instagram | | |

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 | <input type="checkbox"/> Facebook |
| <input type="checkbox"/> Instagram | | |

Set the Criteria:

- In this example we'll assign tickets that include specific keywords to the predefined sales queue. In the criteria section, select Subject > contains and enter the keywords you want to filter for. You can stack multiple criteria using AND and OR logic to fine-tune the conditions.

3 Criteria

The criteria section is a list of terms that must match before the actions are applied to the Ticket.

When the following conditions are met:

| | | |
|---------|----------|---|
| Subject | contains | quote × pricing × purchase × order × trial × partnership × interested × |
|---------|----------|---|

- **AND Criteria:** Use this to narrow down the tickets by combining multiple conditions.

OR Criteria: Use this to broaden the selection by adding more keywords or conditions.

Or when the following conditions are met:

| | | |
|--------------|----------|--|
| User message | contains | interested in × looking for × requesting a quote × budget × evaluating × can we schedule a call × |
|--------------|----------|--|

Define Actions:

- Set the actions to be performed when the criteria are met. In this example, we will assign the ticket to the sales team.

4 Actions

These actions will apply when all of the criteria pass.

Then the following actions will run

| | | | | | | |
|--------|-------------------|---|---------|---|----|---|
| ↑ ↓ | Set assigned team | ▼ | 5 Sales | ▼ | 🗑️ | + |
|--------|-------------------|---|---------|---|----|---|

- You can add multiple actions, such as setting urgency levels to ensure the ticket is addressed promptly. In this example we'll increase the urgency by 5 points.

4 Actions

These actions will apply when all of the criteria pass.

Then the following actions will run

| | | | | | | | |
|--------|-------------------|---|---------------------|---|----|----|---|
| ↑ ↓ | Set assigned team | ▼ | 5 Sales | ▼ | 🗑️ | + | |
| ↑ ↓ | Set urgency | ▼ | Increase urgency by | ▼ | | 🗑️ | + |
| | | | 5 | | | | |

These are just a few examples of how you can use triggers to efficiently triage incoming tickets. The flexibility of Deskpro allows you to create customized workflows tailored to your helpdesk's needs.