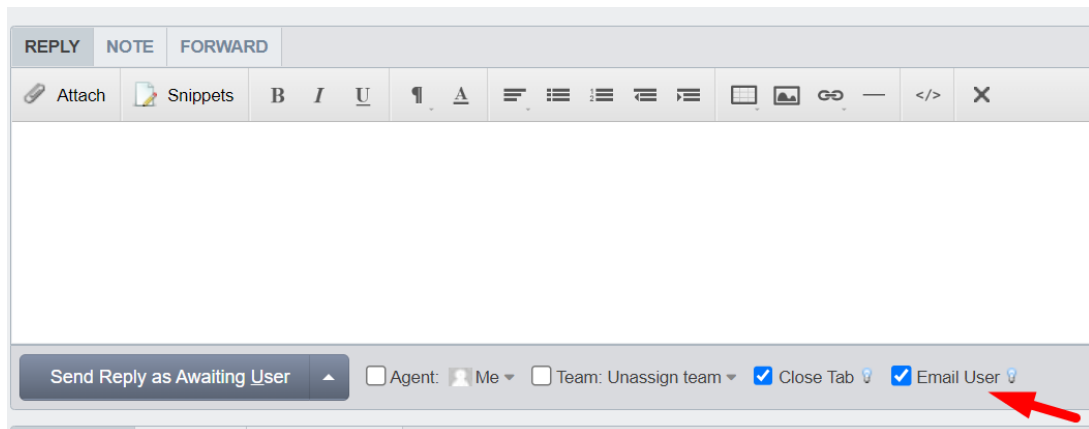


Adding an agent reply without sending an email in Deskpro Horizon

Matthew Wray - 2023-08-21 - (0) megjegyzés - Triggers

In previous versions of Deskpro, there was an option to add an agent reply without sending a message.

You could deselect the email user checkbox in the bottom right of the reply box:



This would mean that when the reply was added it would be visible to an agent from the agent interface and would be visible to the user from the Helpcenter but no email would be sent to the user.

In Deskpro Horizon this option is no longer available (it generally seemed to create confusion and so has been removed).

However, we appreciate that in some instances it can be useful not to send the email, so you can build a simple workflow that will allow you to replicate the behavior of the checkbox.

To do this you will need to make three changes in admin:

- 1) Create a label or custom field to tag tickets where you do not want to send an email.
- 2) Amend your new reply trigger to leverage your new label or custom field.
- 3) Add a new reply trigger that removes the label once the message has been sent.

Creating a label or custom field

In this example, I'm going to create a label but you could equally do this with a custom field (a select field or toggle field would work).

Head to Admin > Ticket Structure > Ticket Labels

Click the '+New' button in the top right and create a new label from the draw (I'll call mine 'no email')

×

Add: New Label

Name*

Color*

Once added agents will be able to add this to tickets (although you may want to quickly check their permissions to ensure they have permission to do so).

Amending the new reply trigger

Once the label has been created we need to amend our reply trigger that sends agent responses so it does not run on tickets where the label has been added.

Go to Admin > Business Rules > Triggers > New Reply Triggers and edit the trigger here.

By default the trigger is named 'Send user new reply from agent' but if you have custom triggers configured to send your agent replies to emails you'll need to amend these too.

Click on the trigger you want to amend and then add the criteria 'Labels does no contain No email' per the screenshot below:

id: 7

1 Properties

Title*
Send user new reply from agent

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

Enabled

2 Event

Event
New reply

By User
 By Agent

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

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:

Agent message	exists	+		
And	Labels	does not contain	No email X	+

Or when the following conditions are met:

Select...	Select...	+
-----------	-----------	---

4 Actions

These actions will apply when all of the criteria pass.

Then the following actions will run

Send email to user	+	
Templates	New Agent Reply	+
To	Email everyone on the ticket (owner and all CC's)	+
From name	Name of the person that initiated the action	+
From email	The account set on the ticket	+
Add headers		

Save Discard Changes Delete

This will stop the trigger from running if an agent adds the label 'No email'.

Adding a reply trigger to remove the label

Once you've added the label and sent your response (where the email was not sent) you will then want the label to be removed (the default status should be that an email is sent unless the agent specifically adds the label when they are sending the message).

To do this we will need to add another New reply trigger to remove the label.

Go to Admin > Business Rules > Triggers > New Reply Triggers and click the '+New' button in the top right.

Then we simply need to configure it to run when the ticket contains the 'No email' label and then when it runs to remove the 'No email' label as below:

The screenshot displays a configuration interface for a trigger, organized into four numbered sections:

- 1 Properties:** The 'Title*' field is set to 'Remove no email label'. Below it, there is a note: 'This title will be used throughout the admin interface to refer to this Trigger.' and an 'Enabled' toggle switch.
- 2 Event:** The 'Event' dropdown is set to 'New reply'. Below this, there are two radio buttons: 'By User' (unselected) and 'By Agent' (selected). A grid of checkboxes follows, with 'Agent interface', 'API', 'Email', 'Phone Call', 'Mobile apps', and 'SMS' checked, and 'Forwarding', 'WhatsApp', and 'Twitter' unchecked.
- 3 Criteria:** A note states: 'The criteria section is a list of terms that must match before the actions are applied to the Ticket.' Below this, there are two criteria rows. The first row is under the 'When' header and contains the condition: 'Labels' (dropdown) 'contains' (operator) 'No email' (value). The second row is under the 'Or' header and contains two 'Select...' dropdowns.
- 4 Actions:** A note states: 'These actions will apply when all of the criteria pass.' Below this, there is one action row under the 'Then' header with the action: 'Remove labels' (dropdown) 'No email' (value).

Warning

The trigger that removes the label must sit below the trigger that sends the reply in the run order (so below it in the list in the UI).

Otherwise, the label will be removed before the trigger that sends the reply is sent and hence it will run on all tickets anyway.

Once configured your agents should then be able to add the label to tickets when they want to reply but send no email.

The label will then be automatically removed so the next time an agent adds a reply to the ticket the default behavior will be to send an email.

