

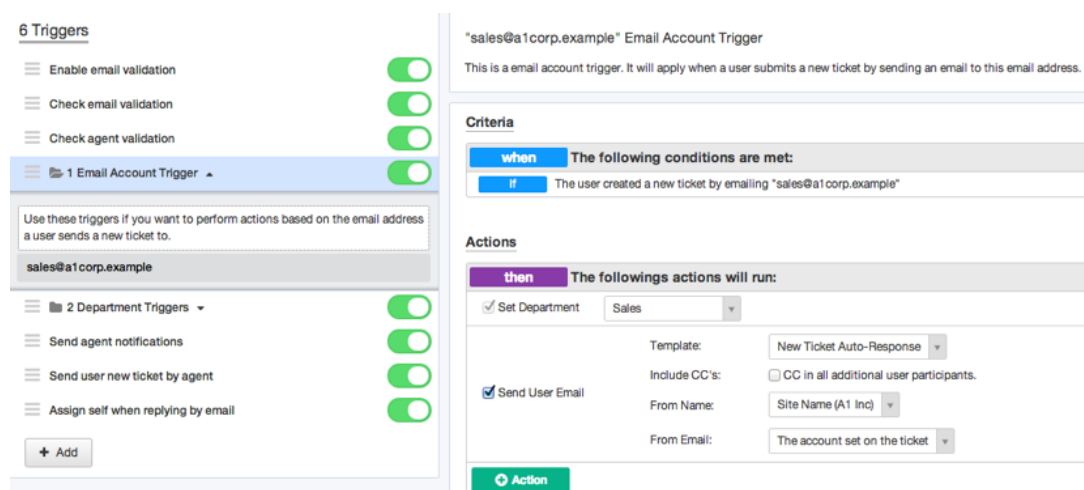
How do I send a different auto-reply to new users?

Ben Henley - 2023-08-16 - (0) megjegyzés - Using Deskpro

Suppose the sales team want to customize the email auto-response when tickets are submitted to the Sales department. They want to send existing users the normal response, but they want new users to get a more elaborate welcome email explaining your product range.

We'll assume you start out with your sales@ account linked to the Sales department with simple **new ticket** triggers, configured to send the the default auto-response.

This **Email Account Trigger** sets tickets sent via the sales@ account to the Sales department, then sends the auto-response.



The screenshot displays the Deskpro configuration interface for an "Email Account Trigger". On the left, a sidebar lists 6 triggers, with "1 Email Account Trigger" selected and expanded. Below this, a list of triggers includes "2 Department Triggers", "Send agent notifications", "Send user new ticket by agent", and "Assign self when replying by email", each with a toggle switch. The main area shows the configuration for the "Email Account Trigger". It includes a description: "This is an email account trigger. It will apply when a user submits a new ticket by sending an email to this email address." The "Criteria" section shows a "when" condition: "The following conditions are met:" followed by an "if" condition: "The user created a new ticket by emailing 'sales@a1corp.example'". The "Actions" section shows a "then" condition: "The followings actions will run:". The actions include "Set Department" (set to "Sales") and "Send User Email" (checked). The "Send User Email" action is configured with the following settings: Template: "New Ticket Auto-Response", Include CC's: "CC in all additional user participants" (unchecked), From Name: "Site Name (A1 Inc)", and From Email: "The account set on the ticket". An "Action" button is at the bottom.

This **Department Trigger** sets tickets submitted via the web where the user has selected the Sales department to the sales@ email account, then sends the auto-response.

6 Triggers

- Enable email validation ☒
- Check email validation ☒
- Check agent validation ☒
- 2 Department Triggers ☒

Use these triggers if you want to perform actions based on the department a user selects when submitting a ticket from the web interface.

Support

Sales

- 1 Email Account Trigger ☒
- Send agent notifications ☒
- Send user new ticket by agent ☒
- Assign self when replying by email ☒

+ Add

"Sales" Department Trigger

This is a department trigger. It will apply when a user submits a new ticket from the web interface and selects

Criteria

when The following conditions are met:

- if** Department is "Sales"
- and** Ticket is created by a user from the web interface

Actions

then The followings actions will run:

- ☒ Set Email Account sales@a1corp.example
 - Template: New Ticket Auto-Response
- ☒ Send User Email
 - Include CC's: ☐ CC in all additional user participants.
 - From Name: Site Name (A1 Inc)
 - From Email: The account set on the ticket

+ Action

The simple triggers can't do what the sales team wants, because their criteria are fixed, so there's no way to specify that you only want to do something to new users.

Instead, you would create a new trigger:

6 Triggers

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Support

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Actions

then The followings actions will run:

- ☒ Set Email Account sales@a1corp.example
 - Template: New Ticket Auto-Response
- ☒ Send User Email
 - Include CC's: ☐ CC in all additional user participants.
 - From Name: Site Name (A1 Inc)
 - From Email: The account set on the ticket

+ Action

This trigger is checked when a user or agent submits a ticket via email or web. (We'll assume that you don't want to send acknowledgements for tickets created using the API).

The criteria you would use are:

Criteria ?

when The following conditions are met:

- Department is Sales
- User is new

+ Criteria

That means the new trigger will only run its actions when the department is Sales, and the

user is new. We’re going to rely on the **Email Account Trigger** to set the department to Sales. Make sure the new trigger is below the simple triggers.

The action you want to run is sending a custom email. You would create a custom email template (see the chapter on [Editing Templates](#) for details), then run it like this:

Actions ?

then

The followings actions will run:

Send User Email	Template:	new-user-sales-welcome.html	✕
	Include CC's:	<input type="checkbox"/> CC in all additional user participants.	
	From Name:	Site Name (A1 Inc)	
	From Email:	The account set on the ticket	

➕

Action

You don’t want users receiving more than one auto-response email when they submit a new ticket. So you would disable the **Send User Email** action for the simple triggers:

Actions

then

The followings actions will run:

<input checked="" type="checkbox"/> Set Email Account	sales@a1 corp.example
<input type="checkbox"/> Send User Email	

➕

Action

Actions

then

The followings actions will run:

<input checked="" type="checkbox"/> Set Department	Sales
<input type="checkbox"/> Send User Email	

➕

Action

We’re almost done. But we want users who don’t receive the custom email to receive the default auto-response email. Since the simple triggers aren’t sending that any more, we need another new trigger to do the job.

We could try to set up a complicated set of Criteria so that the new trigger runs if the user is not new and the department is Sales, or the department is anything else, but there’s a simpler way. We can just put in a check to see if the custom email has already been sent, and make sure the default auto-response trigger is below the one that sends the custom response.

Criteria ?

when	The following conditions are met:	
The user has NOT been emailed	<input checked="" type="checkbox"/> a specific email template	new-user-sales-welcome.html
+ Criteria		

Actions

These actions will apply when all of the criteria pass.

then	The followings actions will run:	
Send User Email	Template:	New Ticket Auto-Response
	Include CC's:	<input type="checkbox"/> CC in all additional user participants.
	From Name:	Site Name (A1 Inc)
	From Email:	The account set on the ticket
+ Action		

Here's the completed triggers in the right order:

- 2 Department Triggers
 - 1 Email Account Trigger
 - Welcome email to new users
 - Send default auto-response
- 