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

Kim - 2024-07-26 - Comments (0) - Using Deskpro

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.

Select the Event:

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

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.

- 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.

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.

- 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.

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.