

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

Kim - 2024-07-26 - Commenti (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.

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 ×
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- 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 ×
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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	▼	Ⓢ Sales	▼	🗑️	+
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- 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	▼	Ⓢ 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.