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."

Event

New ticket ▾

◯ By User

☑ Help Center	☑ Website Widget	☑ API
☑ Ticket Form Widget	☑ Email	☑ Phone
☑ Messenger	☐ SMS	☐ WhatsApp
☐ Twitter	☐ Trust Pilot	☐ Facebook
☐ Instagram		

◯ By Agent

☑ Agent interface	☑ API	☑ Email
☑ Phone Call	☑ Mobile apps	☐ Forwarding
☑ Messenger	☐ SMS	☐ WhatsApp
☐ Twitter	☐ Trust Pilot	☐ Facebook
☐ 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.
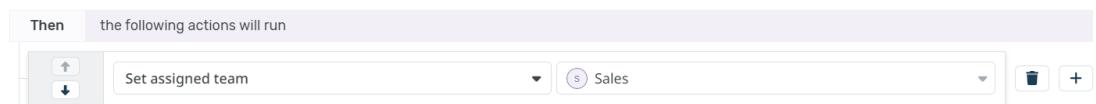
Or when the following conditions are met: 🗑

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**

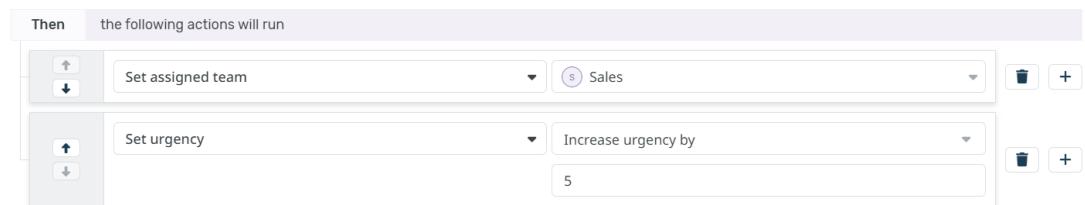These actions will apply when all of the criteria pass.

Then	the following actions will run

↑ ↓ Set assigned team ▼ ⓢ 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 ▼ ⓢ 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.