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How do I make a reusable checklist of things to do within a ticket?

Felipe Bessa Coelho - 2023-10-03 - Comments (0) - Triggers

If you have some tickets that require a long series of subtasks each time they are created: for example, getting ready for a new employee, requires 10 different steps to have be done.

There are two ways you can handle this in Deskpro depending on how you would like the tasks to be actioned.

Using Required Fields

This way involves creating specific required ticket fields for the department so that each time your agents create a ticket they have to provide a response for each of the fields.

- 1. In **Admin > Ticket Structure > Departments**, create a new department for this type of ticket e.g. "New Employees".
- 2. In the Form tab for the new department, select Custom Form Editor from the Form dropdown.
- 3. In **Admin > Ticket Structure > Ticket Fields**, create a new custom Toggle field for each step you need to track. Add it only to the form for the department you created. You will probably want to make it an agents-only field.

Add: New Field

Field type	
Toggle	
Title*	
Signed network usage policy agreement	3
C Enabled	
Agent only field Hide field from users, only agents will be able to see a field.	and edit this
Agents Form 🔞	
Default	
New Employees	
Description	
Has the employee read and agreed to the acceptable usa for company networks?	age policy
Reference Alias 🔞	
Enabled display Label	
Disable display Label	
Enabled by default	
User validation	
No user validation	-
Agent Validation	
No agent validation	

Create

×

1. Back in **Admin > Ticket Structure > Departments**, select your new department and go to the **Form** tab. Make sure that the toggle fields are added to the Agent Form for your new department but not any others. Click on the little gear icon for each field, and uncheck **Only show when there is a value**.

Information	Permissions	Form	Website Embed
orm			
Custom Form	Editor		.
	ill not affect any c	-	o this department. Any changes you make
o this layout wi	ill not affect any c	others.	
User Form A	ill not affect any c	others.	

2. Now when you get a ticket in that department, you can track all the subtasks.

20	Awaiting User	~
Agent	Team	Followers
FB	8	+
- Next event	13 mins Ticket Open	- User Waitin
USER & CC'S	-	•, cc ^
EU Examp newemp	le user loyee@example.c	om
Ref		
YMYE-1360-B	JOL	
Department [*]	oloyees	
Language		
English		
Signed netwo	rk usage poli 🕼	
Account provis	sioned	
New ID card p	rinted	

Using Tasks

You can also combine Deskpro's Tasks and Triggers features to create a list of tasks, whenever tickets are created matching the specific criteria for the tasks to be required.

In this case, you would create a Trigger called "New Hire Process". Set the criteria to match when a ticket is created for your HR Department and the Ticket Subject is New Hire.

3 Criteria									
The criteria section is a list of terms that must match before the actions are applied to the Ticket.									
When	the	e following conditions are met:							
		Department -	is	-	(+) HR ×			+	
An	d	Subject 🗸	is		New Hire:		ī	+	

Then under Actions, set $\ensuremath{\textbf{Create Task}}$, then add as many Tasks as you need.

4 Actions

These actions will apply when all of the criteria pass.

Then	the following act	ions will run		
•	Create task	•		
	Task title	New ID Card Printed		
	Due date	Relative time	•	
		3 Day(s) later		+
	Public			
	Creator	Select	-	
	Assignee	Senior Management	-	
	Link to ticket	0		
	Create task	▼		
	Task title	Account Provisioned		
	Due date	Relative time	•	
*		3 Day(s) later	-	+
	Public	0		
	Creator	Select	•	
	Assignee	IT Support	-	
	Link to ticket	0		

You can set the following fields:

- Task Title
- Due Date

- Visibility (Public or Private)
- Creator
- Assignee
- Link to Ticket

Note

You will likely want the Tasks created by this Trigger to be linked to the specific ticket that caused the action. To do this, make sure you have enabled the toggle **Link to ticket**.

With this method, every time a ticket is created that matches the specified Trigger Criteria, the relevant Tasks will be created.