

Adding tasks to tickets with triggers

Matthew Wray - 2019-10-17 - Comments (0) - Using Deskpro


If we have recurring tickets that require the same group of actions to be completed on them, it can be useful to add these actions on to the tickets as tasks.

We can automate this by using a new ticket trigger.

Creating the Trigger

Go to Admin > Tickets > New ticket triggers and then hit Add to open up the trigger creation page.

Add a title and then specify which creation methods you want the trigger to apply to in Events.

Event	When a new ticket is created	
	<input checked="" type="checkbox"/> By a user	<input checked="" type="checkbox"/> By an agent
	<input checked="" type="checkbox"/> via the web 	<input checked="" type="checkbox"/> via the agent interface
	<input checked="" type="checkbox"/> via email	<input checked="" type="checkbox"/> via email
	<input checked="" type="checkbox"/> via the API	<input checked="" type="checkbox"/> via the API
	<input checked="" type="checkbox"/> via phone call	<input checked="" type="checkbox"/> via the mobile app
		<input checked="" type="checkbox"/> via phone call


Criteria

With the criteria we'll need to use it to identify common properties shared by the types of tickets to add our tasks to.

In my example I'm going to add tasks to a ticket that is raised when a new starter joins our organization.


Hence I've used 'Ticket Subject' contains 'New Starter'

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

 Criteria

Actions

Here we can add the tasks to the new ticket.

In my example below I've just added a couple of typical jobs you may have to do to prepare for new starters.

Actions

These actions will apply when all of the criteria pass. ✕

then The following actions will run: ✕

Task Title:

Due Date: None Relative time On a specific date

Create Task Public: Yes

Creator:

Assignee:

Link to ticket: Yes

Task Title:

Due Date: None Relative time On a specific date

Create Task Public: Yes

Creator:

Assignee:

Link to ticket: Yes

+ Action

SaveDelete

You'll notice here that there are two options for due date 'Relative time' and 'On a specific date'.

When automating in this way we would advise you use a relative date as obviously you have no way of knowing when a ticket is going to be raised.

You can also use the trigger to assign the task to specific agents in the helpdesk.

In this example we're adding the task to the ticket but it is possible to just create the task as an independent object if needed. To do this simply deselect the 'Link to ticket' check box.

Adding Tasks to tickets raised from integrations

A common use case for automating tasks is if you are using an integration to raise the tickets.

When the ticket is raised from an integration we know the exact format it will be in when it is raised so it is easy to automate effectively. For example if you were raising tickets using Google Calendar as described in [this article](#).

You can set the trigger up for this in exactly the same way as you would with the standard trigger.

To ensure that the only tickets that the trigger is applied to are those created through the api then you can specify this in the Event.

Event

When a new ticket is created

By a user

via the web 

via email

via the API

via phone call

By an agent

via the agent interface

via email

via the API

via the mobile app

via phone call