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

Ben Henley - 2023-10-03 - Comments (0) - Deskpro Legacy

Question:

We have some tickets which require a long series of subtasks each time they are created: for example, when we get ready for a new employee, we need to make sure that 10 different steps have been done. What's the best way to handle that in Deskpro?

Answer:

1. In **Admin > Tickets > Departments**, create a new department for this type of ticket e.g. "New Employees".

2. In the Layout tab for the new department, select **Use Custom Form Layout**.

3. In **Tickets** > **Fields**, create a new custom Toggle field for each step you need to track. Add it only to the layout for the department you created. You will probably want to make it an agents-only field.

Field Type	Toggle (On/Off)
Enabled	Enable this field
Layouts	Select which layouts this field should be added to. You can fine display order of fields) from the ticket department section. Agent Layouts Default Layout New Employees
Title *	Signed network usage policy agreement
Description	Has employee read and agreed the acceptable usage policy for company networks?
Checkbox Label	Yes
Default state	Checked by default
User Validation	 No user validation Require the user to check the checkbox
Agent Validation	 No agent validation Require the agent to check the checkbox
Agent Only Field	Only show this field to agents
	Save

4. In **Tickets > Departments > Layout**, make sure that the toggle fields are added to the Agent Form layout 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**.

This is a custom layout tha	at applies only to this department. A		
	an abbuene erub te une aeben untertit.	Any changes you make to	this layout will not affe
Llear Form			
User Form Agent For	m		
The agent ticket form has a few fixed fields such as subject, message, department and user properties. However you can add and arrange additional			Ticket Fields · 4
fields any way you want.	penies. However you can add and a	analige additional	Product
			Category
Account provisione	d		Workflow
			Workflow Priority
 Account provisione Signed network usa 			

5. Now when you get a ticket in that department, you can track all the subtasks, and press 'Save' for any changes made.

+ ADD New Employee n		
ID: 129 New Employee re	quest	X
Newemployee (newemployee@	Add CC	
New Employees - Awaiting Agent) ▼ 1 ▼ 1 ■ ▼	
PROPERTIES TASKS (0) SLAS 0000	BILLING & TIME LOG SALESFORCE (0)	Cancel Save
Agent · Unassign	Team · Assign to Primary Team Followers · Add Me	
Simon Hall	None 🔹 🕫 Add a follower	
Language:	English v	
Account provisioned:	Ves Yes	
Signed network usage policy agreement:	☐ Yes	
New ID card printed:	□ Yes	
Labels:	Add a label	