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New Feature: Even Better Automation

2014-10-02 - Ben Henley - [Comments \(0\)](#) - [Product](#)

Now your triggers and other automatic rules can be smarter. We've expanded DeskPRO's powerful, flexible automation system with even more criteria and actions.

New criteria you can check

During Working Hours: either the default hours set for your helpdesk, or custom hours just for that trigger. Need a trigger that only runs on weekends, or on Monday morning before your first coffee break? Now you can do it.

The screenshot shows the 'Criteria' configuration interface. The title is 'Criteria' with a help icon. Below it, a blue button labeled 'when' is followed by the text 'The following conditions are met:'. The main configuration area includes a dropdown menu set to 'Is within working hours'. Below this are two radio buttons: 'Default working hours' (unselected) and 'Set custom working hours' (selected). The 'Time' section has two columns: 'Time' and 'Timezone'. The 'Time' column has two pairs of dropdowns: the first pair is set to '09' and '00', and the second pair is set to '18' and '00', with the text 'to' between them. The 'Timezone' dropdown is set to 'UTC'. The 'Work Days' section has checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday', with 'Monday' through 'Friday' checked. The 'Holidays' section has a dropdown set to '2014' and a button labeled 'Add new holiday'. At the bottom left of the configuration area is a green button with a plus sign and the text 'Criteria'.

User is/is not: now you can check if a ticket belongs to your best (or worst) customer, and have your helpdesk treat it accordingly.

The screenshot shows the 'User is/is not' configuration interface. It features a blue button labeled 'when' followed by 'The following conditions are met:'. Below this, the text 'User' is followed by a dropdown menu set to 'is' and another dropdown menu set to '(user@example.com)'. Below the 'User' dropdown is a green button with a plus sign and the text 'Criteria'. Below the 'is' dropdown is a search input field containing the text 'user|' and a magnifying glass icon. Below the search input field is a dropdown menu with two options: '(user2@example.net)' (highlighted in blue) and '(user@example.com)'. Below the search input field is a blue button labeled 'or' followed by 'The follow'.

Organization is/is not: you can check for a specific user organization, too.

when The following conditions are met:

Organization is

+ Criteria

or The following conditions are met:

+ Criteria

Check API Key: if you're using the [DeskPRO API](#) to let external software integrate with your helpdesk, you can use this to check if an event was carried out by the API on behalf of an agent, or by the actual agent. Finally, an end to robots masquerading as humans.

or The following conditions are met:

Check API key is

+ Criteria

Check Performer Email: check the email address of the agent/user who caused a trigger event.

or The following conditions are met:

Check Performer Email contains

+ Criteria

Ticket Satisfaction: treat a ticket differently depending on the user's satisfaction score. (You'll need to have the ticket satisfaction survey enabled to use this.)

Criteria ?

when The following conditions are met:

Ticket Satisfaction is

+ Criteria

or The following conditions are met:

+ Criteria

New actions you can run

Create Task: assign agents tasks using the DeskPRO **Tasks** app (read [more about this](#) and other tasks)

improvements).


then The following actions will run:


| | |
|-------------|---|
| Task Title: | <input type="text" value="Create new ID card"/> |
| Due Date: | <input type="text" value="02 October 2014"/> |
| Public: | <input checked="" type="checkbox"/> Yes |
| Creator: | <input type="text" value="Current Agent"/> |
| Assignee: | <input type="text" value="1st Level Support"/> |

 Action


Add Agent Note: you can now automatically add an internal agent note to a ticket.

then The following actions will run:

| | |
|---------|--|
| Author: | <input checked="" type="checkbox"/> Use the assigned agent if there is one  |
| | <input checked="" type="radio"/> Amelie Gent |
| | <input type="radio"/> Si Ales |



This ticket was checked by QA

 Action

Send Email to a specific email address: now you can send an email to any address you like, without creating a helpdesk user. If you want to email an automated service, like email-to-Evernote or an email-to-fax gateway, this is the way to do it. You can send to a list of addresses, too.

then The following actions will run:

| | |
|---|---|
| Email Address to Send to (separate multiple with commas): | <input type="text" value="5553883938@email-to-text.t"/> |
| Template: | <input type="text" value="New ticket requires validation"/> |

Other improvements

Actions can now send **custom email headers:** email headers can affect how mail software processes messages.

Send Email

From Email:

Headers: : ✕

Set Agent Followers can now add the current agent.

then The following actions will run:

If you're new to DeskPRO automation and you want to learn all about the power of triggers, escalations, SLAs, macros and round robins, check out the admin manual section on [Automating the Helpdesk](#).

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