

Dynamic Auto-Assignment through smart rules

In HappyFox, a ticket can be dynamically assigned to the staff members, based on the first replied staff or the last replied staff or the staff who created the ticket(through staff new ticket form). This is done via smart rules.

1. To dynamically assign tickets based on First Replied Staff :

Please goto Manage > Smart rules > Add a new smart rule, add any specific conditions (if required only), select 'Set Assignee (dynamically)' under perform action, select *first replied staff*, associate the appropriate categories and save settings.

This smart rule will ensure that the ticket gets assigned to the staff who replies to it first, irrespective of the ticket assignment.

The screenshot shows a configuration interface for a smart rule. It is divided into three main sections:

- Conditions for this rule:**
 - Match all of these conditions:** This section contains two dropdown menus, both currently showing "-- select --". To the right of these dropdowns are a red minus sign and a green plus sign. A link "Add another condition" is located to the right of this section.
 - Match any of these conditions:** This section also contains two dropdown menus, both showing "-- select --", with a red minus sign and a green plus sign to their right. A link "Add another condition" is also present to the right.
- Actions if the above conditions are met :**
 - Perform action:** This section is highlighted with a red border. It contains two dropdown menus: the first is set to "Set assignee (dyna)" and the second is set to "first replied staff".

2. To dynamically assign tickets based on Last Replied Staff :

Please goto Manage > Smart rules > Add a new smart rule, add any specific conditions (if required only), select 'Set Assignee (dynamically)' under perform action, select *last replied staff*, associate the appropriate categories and save settings.

This smart rule will ensure that the ticket gets assigned to the staff who replied lastly/most recently, irrespective of the ticket assignment.

Conditions for this rule

Match all of these conditions [Add another condition](#)

-- select -- -- select -- - +

Match any of these conditions [Add another condition](#)

-- select -- -- select -- - +

Actions if the above conditions are met :

Perform action

Set assignee (dyna) last replied staff

3. To dynamically assign tickets based on Created Staff :

Please goto Manage > Smart rules > Add a new smart rule, add any specific conditions (if required only), select 'Set Assignee (dynamically)' under perform action, select *created staff*, associate the appropriate categories and save settings.

This smart rule will ensure that the ticket gets assigned to the staff who created the ticket through staff new ticket form. Please note that, this option would be helpful in scenarios wherein the staff members create tickets on behalf of clients.

Conditions for this rule

Match **all** of these conditions

[Add another condition](#)

-- select --

-- select --



Match **any** of these conditions

[Add another condition](#)

-- select --

-- select --



Actions if the above conditions are met :

Perform action

Set assignee (dyna

created staff