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.

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 ⬍