Create and Manage Smart Rules

Smart Rules help automate actions to take care of repetitive tasks.

To add a Smart Rule,

1. Login to your account and navigate to Smart Rules under the Manage Tab.

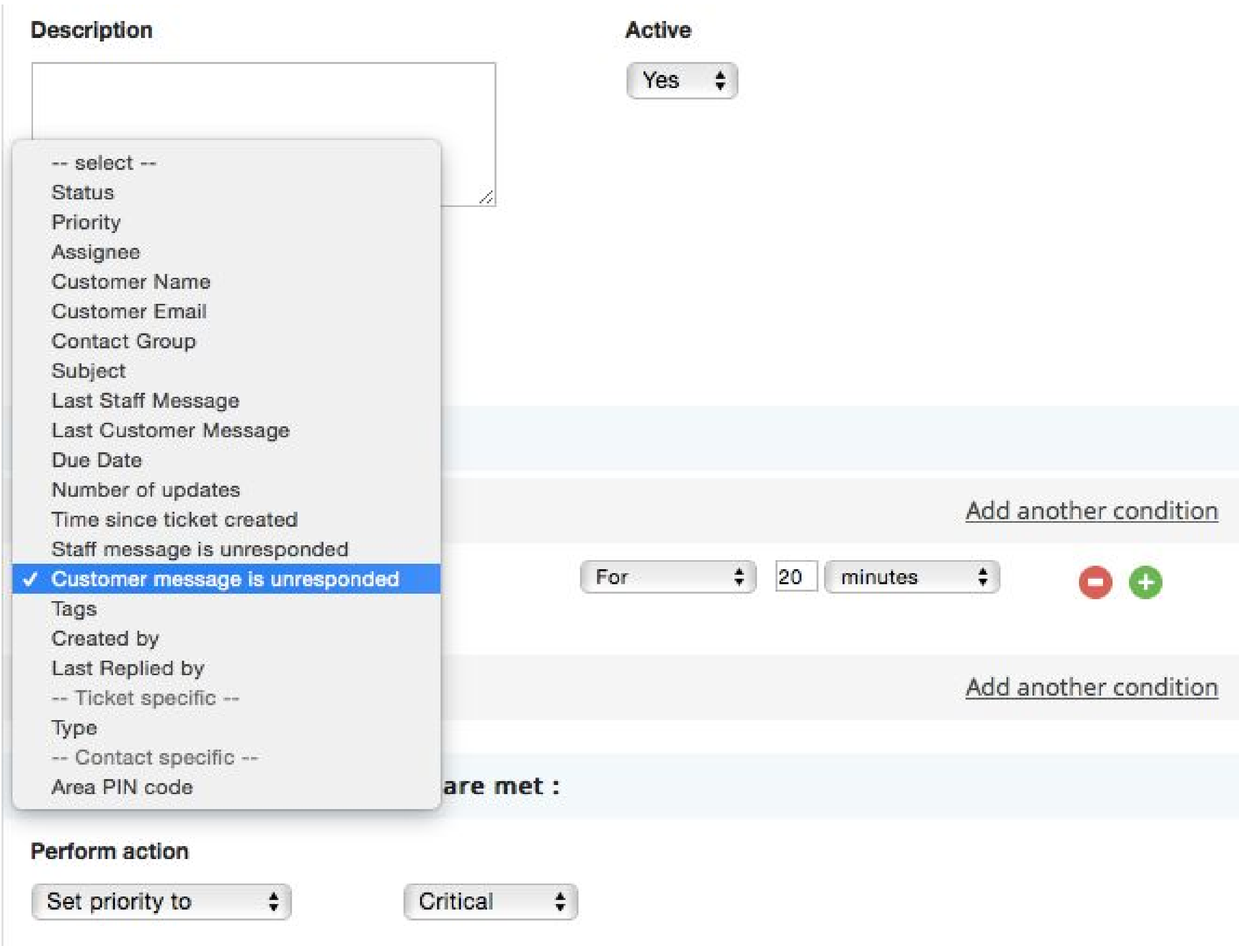
2. Click Add New Smart Rule or the New Smart Rule button

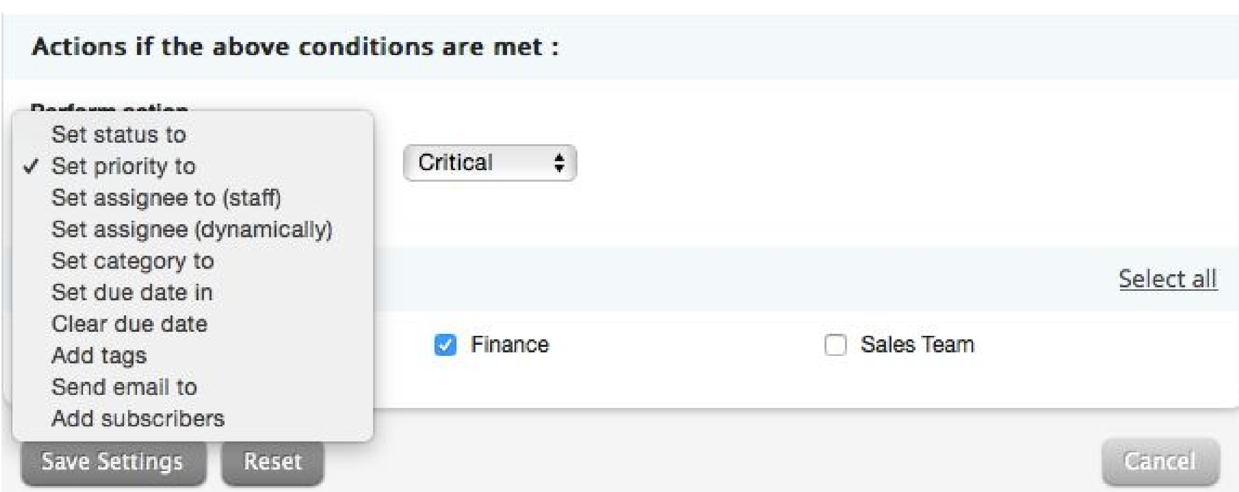
3. Provide a name and a description for the smart rule

4. Choose the appropriate work schedule, if required only.

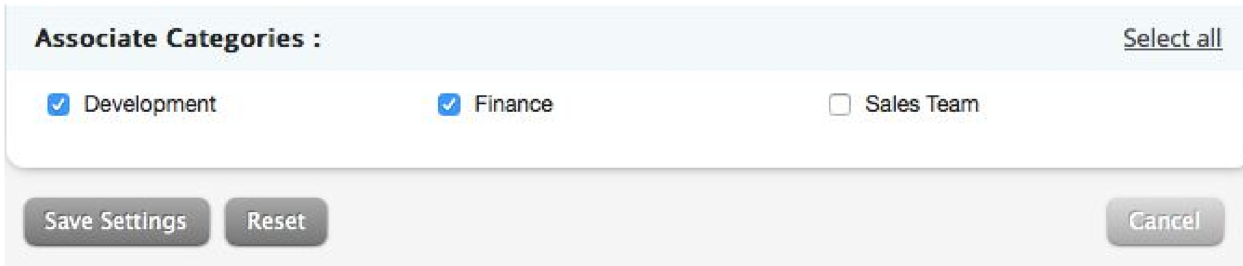
5. Specify the conditions for the smart rule to act upon and the action that has to be performed when the specified condition arises.

The smart rule shown below changes priority to critical in case a customer message is not responded for 20 minutes.


Description
Active
Yes
-- select --
Status
Priority
Assignee
Customer Name
Customer Email
Contact Group
Subject
Last Staff Message
Last Customer Message
Due Date
Number of updates
Time since ticket created
Staff message is unresponded
Customer message is unresponded
Tags
Created by
Last Replied by
-- Ticket specific --
Type
-- Contact specific --
Area PIN code
Add another condition
For
20
minutes
Add another condition
are met :
Perform action
Set priority to
Critical


Actions if the above conditions are met :
Set status to
Set priority to
Set assignee to (staff)
Set assignee (dynamically)
Set category to
Set due date in
Clear due date
Add tags
Send email to
Add subscribers
Critical
Select all
Finance
Sales Team
Save Settings
Reset
Cancel

You can associate the smart rule with relevant categories. Click “Save Settings” to confirm and see the smart rule in action.



Please note that the Smart Rule would only apply to tickets that come in after the smart rule was created/edited, and would not apply to the existing tickets unless an update is added to them