

Creating New Ticket rule

When a new message is received in the account, Puzzel Ticketing checks to determine if the message is part of an existing ticket. If not, a new ticket is created which is checked against the Group and Ticket Rules.

By default a rule is built into the system called Email Default Group which cannot be deleted. This has no conditions and acts as a catch all such that its actions are always applied to tickets. This is to ensure that all tickets are assigned to a team should you not create any additional rules.

It is also how to set virus and spam conditions as this will apply to all traffic.

A specific Spam Flag, Virus Flag and Blacklisted condition exists and an example of how to set this up is shown below:

The screenshot shows the configuration for a rule named 'Spam & Virus'. The interface is divided into several sections:

- Rule Details:** Includes the rule name 'Spam & Virus' and a checkbox for 'Put out of action' (Rule is disabled).
- Rule Conditions:** Shows a dropdown set to 'any' with the text 'of the following conditions are met:'. Below this are two conditions: 'Spam Flag' is set to 'is set' and 'Virus Flag' is set to 'is set'. There are 'Remove' buttons for each condition and an '+ Add condition' button. Below the conditions are two checkboxes: 'Stop checking further rules if the conditions of this rule are met.' (checked) and 'Stop checking further groups if the conditions of this rule are met.' (unchecked).
- Rule Actions:**
 - Ticket Attributes:**
 - Assign to Team:** Set to 'All Users' (OFF).
 - Set Priority:** Set to 'Junk' (ON).
 - Set Status:** Set to 'closed' (ON). A warning message states: 'Once closed, tickets cannot be edited.'
 - Set Response Target:** OFF.
 - Set Resolve Target:** OFF.
 - Assign Categories:** OFF.
 - Assign Tags:** OFF.
 - During Business Hours:**
 - Send automatic reply:** OFF.
 - Options: 'Do not include channel signature in auto-reply' and 'Include incoming message after chosen template in auto-reply'.
 - Outside of Business Hours:**
 - Send automatic reply:** OFF.
 - Options: 'Do not include channel signature in auto-reply' and 'Include incoming message after chosen template in auto-reply'.
 - Follow Up Messages:**
 - First Contact:** Pre-populate first reply (OFF).

If either Spam or Virus flags are detected, no further checks are made instead the Actions are undertaken. As the ticket assignment is OFF and instead the ticket is set to Junk and Closed status. This means it will not then be picked up for work by an agent.

No SLA is set on Response or Resolve target. No Categories or Tags are assigned.

And no Auto responses are set (Business Hours, Outside Business Hours) with no Follow Up Messages or Automatic Scheduled Tasks.

To setup or edit a rule, you need to:

1. Give a name to the rule
2. Select Any or All of the following conditions are met according to your requirement
3. Add the condition by clicking on the **+ Add condition** icon and define the rule to be matched
4. Tick to stop checking for any other conditions if this rule is met

New Email Rule

Rule Details

Name

Put out of action

☐ Rule is disabled

Rule Conditions

If all of the following conditions are met:

Channel

is equal to

ticket

Remove

Add condition

☐ Stop checking further rules if the conditions of this rule are met.

☐ Stop checking further groups if the conditions of this rule are met.

5. Select the team to assign to. Can also be assigned to User depending on Channel settings.
6. Set Priority of the ticket : Highest to Junk
7. Set Status : Open, Pending, On-Hold, Resolved, Closed. For example tickets that will not be handled can go straight to Resolved or Closed (a Closed ticket cannot be reopened).
8. Set Response and Resolve Targets based on SLA
9. Set Categories and Tags : Automatically assign for high level reporting
10. Set different auto responses for Business and Outside of Business Hours. Working Hours must be set for this to operate.
11. Set up follow up messages. Read for more details on [Setting up Follow up messages](#)
12. Set up Scheduled tasks.

Rule Actions

Ticket Attributes

Assign to Team

Set Priority

Set Status

Set Response Target

Set Resolve Target

Assign Categories

Assign Tags

During Business Hours

Send automatic reply

☐ Do not include channel signature in auto-reply

☐ Include incoming message after chosen template in auto-reply

Outside of Business Hours

Send automatic reply

☐ Do not include channel signature in auto-reply

☐ Include incoming message after chosen template in auto-reply

Follow Up Messages

Send Template

if no reply after

hours

Using Channel

Add Follow Up

Resolve after last Follow-Up

First Contact

Pre-populate first reply

Scheduled Tasks

Input comment/note

Task Allocation

if no reply after

hours

Add Scheduled Task

13. Click Save