

## Event Rules

Event rules are automatic rules that are triggered when a specific event occur on a ticket. You can define ticket events such as Form changed, Message received etc [see the drop down for a full list of events that can be used on the Event rule page] and set actions to be performed automatically once the criteria is met.

Unlike the business rules that are executed on automatic ticket creation, event rules come into play when you need certain actions to be taken spontaneously on the existing tickets based on a trigger.

### Creating new Event Rule group

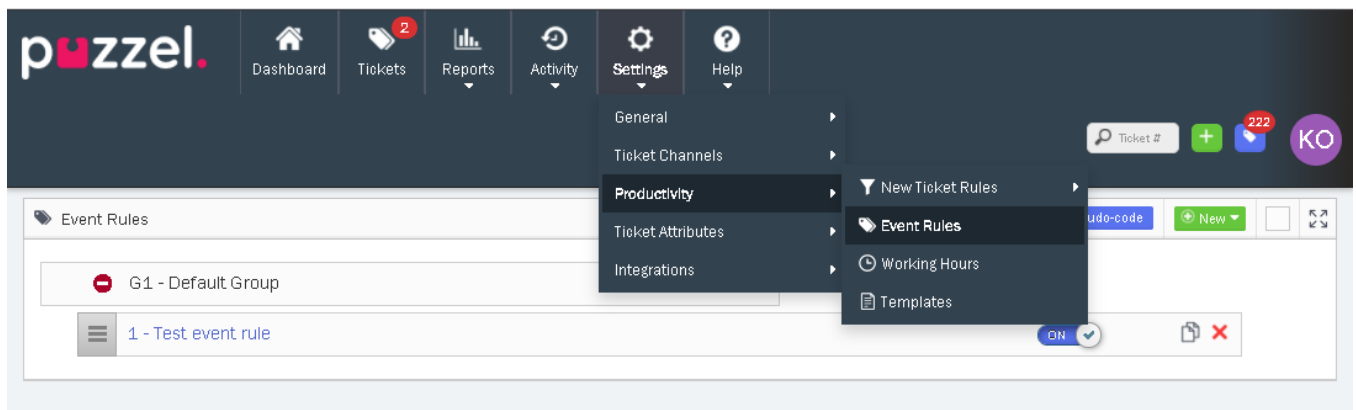
Event Rule group are a logical way of organising event rules so that it can be easily managed. It is recommended that event rules are organised and contained within event rule groups.

Furthermore, groups can have conditions of their own. If these are NOT met at group level, the individual ticket rules within that Group Do Not apply.

It is also possible to stop checking subsequent groups if all/any conditions of a group are met. This allows rules to be very specific and is executed in a controlled manner.

To create a new Event Rule Group:

1. Go to Settings-> Productivity-> Event Rules



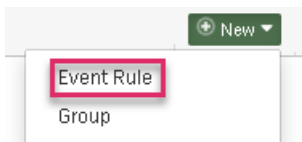
2. Click on New -> Group
3. Enter the name of the group and specify the criteria to be met at group level
4. Select the “Stop checking further groups if the conditions of this group are met” option if you want no subsequent groups to be checked
5. Click **Save**.

The screenshot shows the 'New Event Rules Group' form. At the top is a navigation bar with 'puzzel.' logo and tabs for Dashboard, Tickets (4), Reports, Activity, Settings, and Help. On the right of the navigation bar are a search bar, a green '+' button, a notification bell with '222', and a user profile icon 'KO'. The form itself has a title bar 'New Event Rules Group'. Below it is the 'Group Details' section with a 'Name' field containing 'Test Group' and a 'Put out of action' checkbox labeled 'Group is disabled'. The 'Group Conditions' section starts with 'If any of the following conditions are met:' followed by a list of conditions: 'Ticket Event' is equal to 'Team Changed'. There is a '+ Add condition' button and a '- Remove' button. At the bottom of the conditions section is a checkbox 'Stop checking further groups if the conditions of this group are met.' which is checked. The form ends with 'Cancel' and 'Save' buttons.

## Creating Event Rules

To create event rules,

1. Go to Settings->Productivity-> Event Rules.
2. Click on New -> Event Rule



3. Enter the rule name and specify the conditions to be met

The screenshot shows the 'New Event Rule' form. The navigation bar is identical to the previous screenshot. The form has a title bar 'New Event Rule'. Below it is the 'Rule Details' section with a 'Name' field containing 'Rule name' and a 'Put out of action' checkbox labeled 'Rule is disabled'. The 'Rule Conditions' section starts with 'If all of the following conditions are met:' followed by a list of conditions: 'Ticket Event' is equal to 'Team Changed'. There is a '+ Add condition' button and a '- Remove' button. At the bottom of the conditions section are two checkboxes: 'Stop checking further rules if the conditions of this rule are met.' and 'Stop checking further groups if the conditions of this rule are met.', both of which are unchecked.

4. You can choose to stop checking successive rules in this group or subsequent groups if this rule or group conditions are met.
5. Under Rule Actions section, You can define the action/s when a event condition/s has been met

Rule Actions

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Assign To Team OFF

Support

Set Form/Form Fields ON

Support form

Puzzel product details Puzzel product

Feature broken PCC

Set Response Target ON Ticket Team Organisation

minute(s)

Reset Response Target OFF

Set Resolve Target ON Ticket Team Organisation

minute(s)

Reset Resolve Target OFF

Assign Categories ON choice 2

Assign Tags ON Return customer

- i. Automatically assign it to a team or to a user in the team by toggling the button to ON and selecting the team and user from the drop-down to assign the ticket to.

Assign To Team ON

Support

All Users

Sales

SMS Team

Support

- ii. Apply Form/Form fields to a ticket by toggling the button to ON and selecting the Form from the drop-down menu. Enter the values for the Form fields to auto populate when the event rule is satisfied. The completed form will then be assigned to the ticket.

Set Form/Form Fields ON

Support form

Puzzel product details Puzzel product

Feature broken PCC

- iii. Turn on the Set Response Target and Set Resolve Target. Define Rule Actions by setting the response target and resolve target for the event defined above. As seen in the picture below, you could define actions for individual tickets or at the team or organisation level.

## Rule Actions

Set Response Target	<input checked="" type="radio"/> ON	<input type="radio"/> Ticket <input checked="" type="radio"/> Team <input type="radio"/> Organisation
Reset Response Target	<input checked="" type="radio"/> ON	
Set Resolve Target	<input checked="" type="radio"/> ON	<input type="radio"/> Ticket <input checked="" type="radio"/> Team <input type="radio"/> Organisation
Reset Resolve Target	<input checked="" type="radio"/> ON	

### Note

#### Key points about Response Target

- 1) If the last message is outbound the Respond by parameter will be calculated using the time the next inbound message arrives
- 2) If selected, and the last message is inbound (ie nobody has responded yet) then Respond by will be calculated using the current time
- 3) If NOT selected, and the last message is inbound (ie nobody has responded yet) then Respond by will be calculated using the time the last message arrived

#### Key points about Resolve Target

- 1) If selected, Resolve by is calculated from the current time
- 2) If NOT selected, the Resolve by is calculated from the last time the ticket was opened.

#### iv. Assign category and tags if needed

Assign Categories	<input checked="" type="radio"/> ON	<input type="text" value="choice 2 X"/>
Assign Tags	<input checked="" type="radio"/> ON	<input type="text" value="Return customer X"/>

#### 6. Click Save.

## User scenario on how to use Event Rules:

### Scenario 1:

As a user, I would like the response/resolve SLA to be changed when an agent moves from Team A to Team B with a different set of priorities. This can be achieved in three steps as explained below:

1. Apply team based SLA
2. Create Event Rule
3. Change the team of the agent assigned on the ticket to see the new response/resolve targets.

#### Apply team based SLA

To set the SLA for each team,

1. Go to Settings -> General -> Teams
2. Edit the team you wish to set the SLA to

The screenshot shows the Puzzel dashboard with the Settings menu open. The 'Teams' option is highlighted in the sub-menu. The dashboard includes a top navigation bar with icons for Dashboard, Tickets, Reports, Activity, Settings, and Help. A search bar is visible on the left, and a 'Registered Teams' table is shown below the search bar. The table lists teams like 'All Users', 'Admin portal - PCC', and 'Galangal' with their respective user avatars and actions (Edit, Delete).

- Under **Ticket Reply** Options, set the Response and/or Resolve target (say 1 day)
- Click **Save**

**Ticket Reply Options**

Text to insert into the ticket subject:

Delay replies until next working hours: ☐ **NO**

Queue replies sent outside of work hours: ☐

Set Response Target: ☒ **ON**  day(s)

Set Resolve Target: ☒ **ON**  day(s)

**Note**

You can do a similar process with the Organisation as well.

### Create Event Rule

To create new event rule, follow the instructions in the [Creating Event Rules](#) section and mark the condition as **Ticket Event is equal to Team Changed**. Then select Team for Set Response/Resolve Target under Rule Actions and Click Save.

**Rule Actions**

Set Response Target: ☒ **ON** ☐ Ticket ☒ Team ☐ Organisation

Reset Response Target: ☒ **ON**

Set Resolve Target: ☒ **ON** ☐ Ticket ☒ Team ☐ Organisation

Reset Resolve Target: ☒ **ON**

Finally change the team of the agent assigned to a ticket to see the change in SLA.

The screenshot shows the Puzzel dashboard with a ticket titled "Chuck Norris' preferred IDE is hexedit." The ticket is assigned to "me" and has a priority of "HIGHEST" with a score of 100. The status is "OPEN". The response and resolve targets are both set to 30 minutes. The timeline shows an email from a customer to Cynthia Schroeder. The attributes panel on the right shows fields for Organisation (Vizsla 000), Team (All Users), Assigned To (Unassigned), Priority (Highest), and Tags (No Tags). The forms panel shows a form for "Services - Admin portal" with a note field and a service dropdown set to "Option 1".

## Scenario 2:

As a user I need to be able to change the Response/Resolve SLA whenever I change priority of a ticket. Assumption is made that each priority level will have its own SLA.

Follow the steps in the [Creating Event Rules](#) section and

- Add 2 conditions: Ticket Event is equal to Priority Changed and Priority is equal to Highest
- Under Rule Actions, turn on the Set Response Target and Set Resolve Target
- Select Ticket for both options.
- Set the Response/Resolve target to, say, 1 day.
- Click Save

### Rule Actions

Set Response Target

☒ ON

☒ Ticket
 ☐ Team
 ☐ Organisation

Reset Response Target ☒ ON

Set Resolve Target

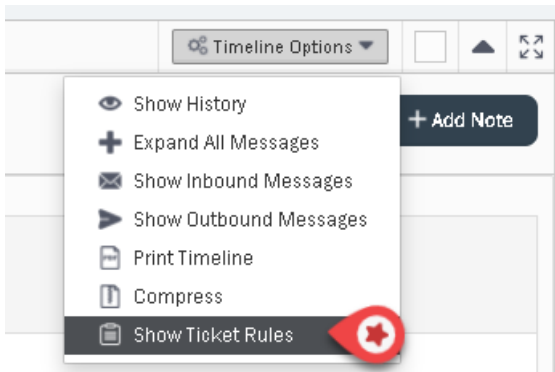
☒ ON

☒ Ticket
 ☐ Team
 ☐ Organisation

Reset Resolve Target ☒ ON

Finally change the priority in the ticket to see your new response/resolve targets.

To see all the rules that has been applied to a ticket, open a ticket and go to Timeline Options -> Show Ticket rules



This will display a list of all the rules applied on the ticket.

Chuck Norris' preferred IDE is hexedit. via fund-raisingc79ea63bb129

February 04, 2021 16:54		Rules applied: G1* (Test event rule*), G2* (Test event rule 1*, rule 2 of grp 2*)
February 04, 2021 16:54		Rules applied: G1* (Test event rule*), G2* (rule 2 of grp 2*)
February 04, 2021 16:54		Rules applied: G1* (Test event rule*), G2* (rule 2 of grp 2*)
February 04, 2021 16:54		Rules applied: G1* (Test event rule*), G2* (rule 2 of grp 2*)
February 04, 2021 16:48		Rules applied: G1* (rule 2 of grp 2*, Test event rule*), G2* (Test event rule 1)
February 04, 2021 16:48		Rules applied: G1* (rule 2 of grp 2*, Test event rule*), G2
February 04, 2021 16:48		Rules applied: G1* (rule 2 of grp 2*, Test event rule*), G2* (Test event rule 1*)
January 26, 2021 08:25		<p>From: Customer <a href="mailto:customer@company.com">customer@company.com</a></p> <p>To: Cynthia Schroeder <a href="mailto:terill@gleason.info">terill@gleason.info</a></p>

### Note

1. Working hours and days are respected by the Event rules. For more details read [this](#) article.
2. The event changes are also recorded under Activity log

### Scenario 3

As a user i would like the ticket to be auto-populated with a complaint form when the ticket is moved to Complaints team.

Follow the steps mentioned here to achieve the task:

- Create a Complaint form and assign it to the Complaints team
- Create the necessary form fields in the form
- Create an Event Rule with two conditions :

1. Ticket event is equal to Team Changed

2. Team is equal to Complaints

- In the Rule Actions section toggle the Set Form/Form fields option to ON. Select the form you wish to be populated if the condition is satisfied and fill in the form field values.
- Click Save

In the picture below you will see the ticket is assigned to Sales team and no forms attached to it at the start.

The screenshot displays the 'Parent and Child Tickets' interface. On the left, the 'Organisations' dropdown is set to 'Unassigned'. The 'Team' dropdown is open, showing options: 'Sales', 'All Users', 'Complaints' (highlighted), 'Sales', 'SMS Team', and 'Support'. The 'Assigned To' field is 'Jayanthi Kumar' and the 'Priority' is 'Normal'. The 'Post-It Note' field is empty. Below these are 'Categories' and 'Complaint type' (set to '--Unassigned--'). The 'queries' field is also set to '--Unassigned--'. A 'Test' field is empty. A 'Save' button is visible. On the right, a 'Parent Ticket' summary shows: Ticket # 74, Assigned to JK (Jayanthi Kumar), Team Support, Subject 'New child ticket', and Status 'OPEN'. Below this, a 'Forms' section shows a 'Form' dropdown set to 'Unassigned'. A second 'Save' button is at the bottom right.

Once the team is changed to Complaints, the form is automatically filled and applied to the ticket. Please note that the action of adding a Form to a ticket will only be allowed if the current assigned team has permission to access the Form that the rule is attempting to apply.



Attributes

Organisation:

Unassigned

Team:

Complaints

Assigned To:

Unassigned

Priority:

Normal

Status:

Open

Tags:

No Tags

Post-It Note:

Categories

complaints:

--Unassigned--

Complaint type:

--Unassigned--

queries:

--Unassigned--

Test:

Save

Parent and Child Tickets

Parent Ticket

Ticket #	Assigned	Team	Subject	Status
74	JK	Support	New child ticket	OPEN

Forms

Form:

Complaints form

Complaint <sup>1</sup>

Faulty