Automatic escalations on help-desk tickets have been added in version 1.21.12.

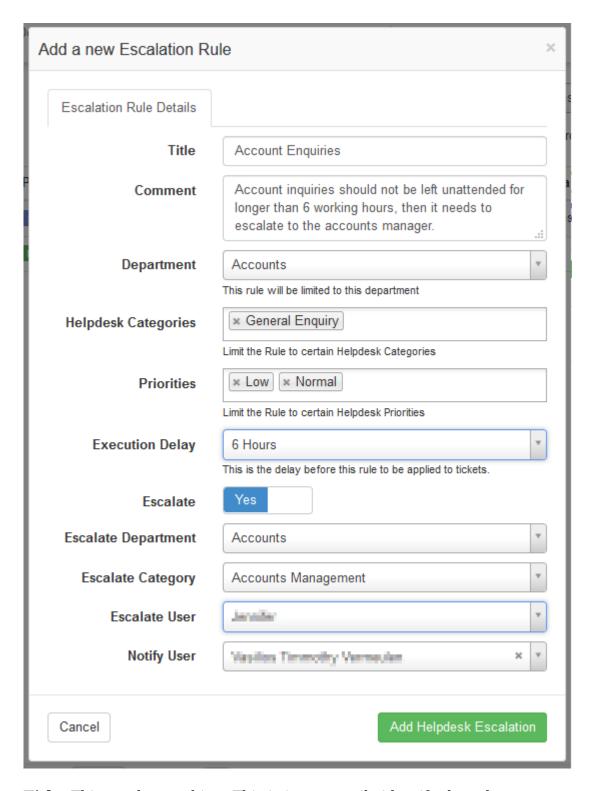Various improvements on the automatic escalation feature has been added in version 1.21.14.

Escalation rules are executed based on the department and category a ticket is currently in.

Automatic escalating tickets are especially useful when there is a signed service level agreement between the customer and the company about how quick tickets needs to be sorted.

Add an escalation rule

Go to Workflow, Helpdesk, Setup, Escalation Rules

Title: This can be anything. This is just to easily identify the rules.

Comment: More information on why the escalation is needed.

Department: Department the ticket(s) is in that needs to be escalated.

Helpdesk Categories: Categories the ticket(s) is in that needs to be escalated. This is optional. If left blank, the rule will apply to all categories in the department field.

Priorities: This is optional. If left blank, the rule will apply to all priorities.

Execution Delay: This is the time delay until the rule will apply to tickets. The time is calculated from the latest updated date on a ticket. This may be the ticket's creation date / last updated date / last escalated date.

Escalate: Turn escalate on or off. An escalation rule can either escalate it to an admin user or just notify an admin user, or both.

Escalate Department: The department the ticket should get escalated to. This is usually kept as the same department with only the category and user changing. But it is possible to escalate a ticket to another department.

Escalate Category: Helpdesk category of the department selected in the escalate department field.

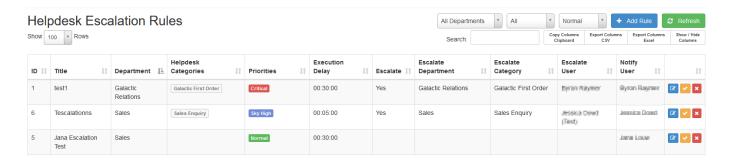**Escalate User:** Admin user in the department selected in the escalate department field. This is the admin user the ticket will get reassigned to.

Notify User: Send a notification to an admin user about the ticket that escalated. Admin users can be notified with or without the ticket escalating to an admin user.

Viewing and reordering escalation rules

Go to Workflow, Helpdesk, Setup, Escalation Rules

Helpdesk Escalation Rules

Show 100 Rows

All Departments | All | Normal | + Add Rule | ⟳ Refresh

Search:

Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns

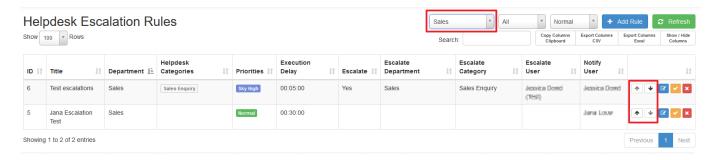| ID	Title	Department	Helpdesk Categories	Priorities	Execution Delay	Escalate	Escalate Department	Escalate Category	Escalate User	Notify User	
1	test1	Galactic Relations	Galactic First Order	Critical	00:30:00	Yes	Galactic Relations	Galactic First Order	Byron Rayner	Byron Rayner	✎ ✓ ✗
6	Tescalationns	Sales	Sales Enquiry	Sky High	00:05:00	Yes	Sales	Sales Enquiry	Jessica Dowd (Test)	Jessica Dowd	✎ ✓ ✗
5	Jana Escalation Test	Sales		Normal	00:30:00					Jana Louw	✎ ✓ ✗

Filter by a department, then you are able to reorder rules according to when they should be used. Rules are used from top to bottom. (Highest rules gets used first.)
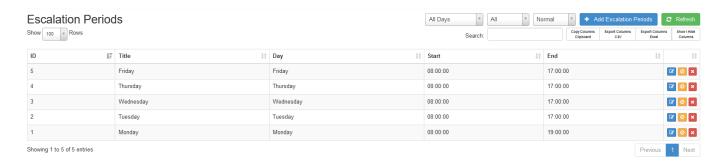
Reordering is only necessary when rules have similar setup on what a ticket should be matched on.

(Similar setup on escalation rule: same department, same category, same priority.)

Helpdesk Escalation Rules

Show 100 Rows

Sales | All | Normal | + Add Rule | ⟳ Refresh

Search:

Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns

ID	Title	Department	Helpdesk Categories	Priorities	Execution Delay	Escalate	Escalate Department	Escalate Category	Escalate User	Notify User	
6	Test escalations	Sales	Sales Enquiry	Sky High	00:05:00	Yes	Sales	Sales Enquiry	Jessica Dowd (Test)	Jessica Dowd	↑ ↓ ✎ ✓ ✗
5	Jana Escalation Test	Sales		Normal	00:30:00					Jana Louw	↑ ↓ ✎ ✓ ✗

Showing 1 to 2 of 2 entries

Previous 1 Next

Set up working hours

Go to Workflow, Helpdesk, Setup, Escalation Periods

Escalation Periods

Show 100 Rows

All Days | All | Normal | + Add Escalation Periods | ⟳ Refresh

Search:

Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns

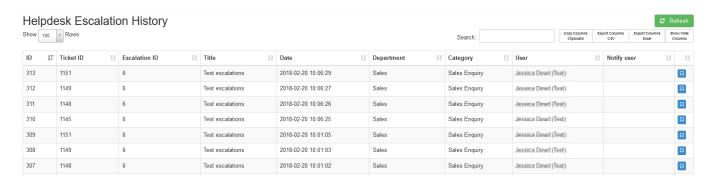| ID	Title	Day	Start	End	
5	Friday	Friday	08:00:00	17:00:00	✎ ⊘ ✗
4	Thursday	Thursday	08:00:00	17:00:00	✎ ⊘ ✗
3	Wednesday	Wednesday	08:00:00	17:00:00	✎ ⊘ ✗
2	Tuesday	Tuesday	08:00:00	17:00:00	✎ ⊘ ✗
1	Monday	Monday	08:00:00	19:00:00	✎ ⊘ ✗

Showing 1 to 5 of 5 entries

Previous 1 Next

The automatic escalation rules will only get executed during the escalation periods set up.

For example, if you only want tickets to escalate during working hours.

History of escalation rules

See a history of all tickets that escalation successfully using the automatic escalation rules.

Note:

A full help-desk escalation guide is being prepared and will be released soon.