

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

Add a new Escalation Rule

Escalation Rule Details

Title

Account Enquiries

Comment

Account inquiries should not be left unattended for longer than 6 working hours, then it needs to escalate to the accounts manager.

Department

Accounts

This rule will be limited to this department

Helpdesk Categories

× General Enquiry

Limit the Rule to certain Helpdesk Categories

Priorities

× Low

× Normal

Limit the Rule to certain Helpdesk Priorities

Execution Delay

6 Hours

This is the delay before this rule to be applied to tickets.

Escalate

Yes

Escalate Department

Accounts

Escalate Category

Accounts Management

Escalate User

Jennifer

Notify User

Vanessa Timothy Verschuilen

Cancel

Add Helpdesk Escalation

**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

# Helpdesk Escalation Rules

Show100Rows

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	Bryan Ruyter	Gyton Ruyter	<div><div></div><div></div><div></div></div>
6	Tescalationns	Sales	Sales Enquiry	Sky High	00:05:00	Yes	Sales	Sales Enquiry	Jessica Dond (Test)	Jessica Dond	<div><div></div><div></div><div></div></div>
5	Jana Escalation Test	Sales		Normal	00:30:00					Jana Louer	<div><div></div><div></div><div></div></div>

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

Show100Rows

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 Dond (Test)	Jessica Dond	<div><div>↑</div><div>↓</div><div>✎</div><div>✓</div><div>✕</div></div>
5	Jana Escalation Test	Sales		Normal	00:30:00					Jana Louer	<div><div>↑</div><div>↓</div><div>✎</div><div>✓</div><div>✕</div></div>

Showing 1 to 2 of 2 entries

Previous

1

Next

## Set up working hours

Go to Workflow, Helpdesk, Setup, Escalation Periods

Escalation Periods

Show100Rows

All DaysAllNormal+ Add Escalation PeriodsRefresh

Search:

Copy ColumnsClipboardExport ColumnsCSVExport ColumnsExcelShow / Hide Columns

ID	Title	Day	Start	End	
5	Friday	Friday	08:00:00	17:00:00	<div><div></div><div></div><div></div></div>
4	Thursday	Thursday	08:00:00	17:00:00	<div><div></div><div></div><div></div></div>
3	Wednesday	Wednesday	08:00:00	17:00:00	<div><div></div><div></div><div></div></div>
2	Tuesday	Tuesday	08:00:00	17:00:00	<div><div></div><div></div><div></div></div>
1	Monday	Monday	08:00:00	19:00:00	<div><div></div><div></div><div></div></div>

Showing 1 to 5 of 5 entries

Previous1Next

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.

Helpdesk Escalation History

Show

100

Rows

Search:

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Export ColumnsCSV

Export ColumnsExcel

Show / Hide Columns

Refresh

ID	Ticket ID	Escalation ID	Title	Date	Department	Category	User	Notify user
313	1151	6	Test escalations	2018-02-20 10:06:29	Sales	Sales Enquiry	Jessica Clowd (Test)	
312	1149	6	Test escalations	2018-02-20 10:06:27	Sales	Sales Enquiry	Jessica Clowd (Test)	
311	1148	6	Test escalations	2018-02-20 10:06:26	Sales	Sales Enquiry	Jessica Clowd (Test)	
310	1145	6	Test escalations	2018-02-20 10:06:25	Sales	Sales Enquiry	Jessica Clowd (Test)	
309	1151	6	Test escalations	2018-02-20 10:01:05	Sales	Sales Enquiry	Jessica Clowd (Test)	
308	1149	6	Test escalations	2018-02-20 10:01:03	Sales	Sales Enquiry	Jessica Clowd (Test)	
307	1148	6	Test escalations	2018-02-20 10:01:02	Sales	Sales Enquiry	Jessica Clowd (Test)	

### Note:

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