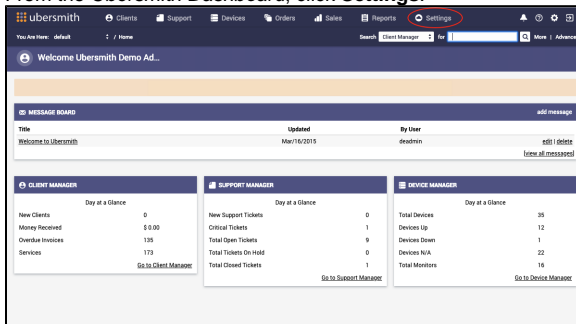


# Adding Support Ticket Escalations

Escalations are automated actions that can be taken on support tickets once a set of predefined rules are met. You can create rules to determine when an action needs to be taken, such as the amount of time that passes in order to manage client service level agreements (SLAs). Another example would be to set up an escalation that would help you identify any support tickets that were not being handled correctly.

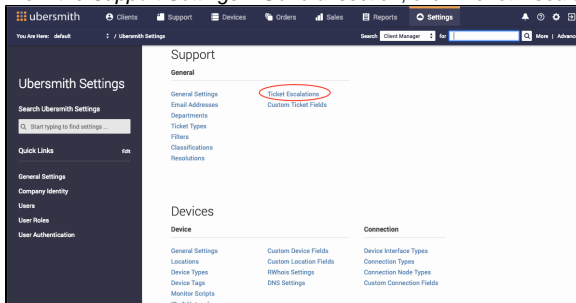
## Access the Ticket Escalations Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

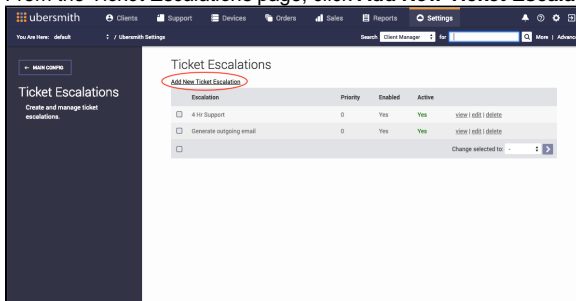
2. From the *Support Settings – General* section, click **Ticket Escalations**.



The *Ticket Escalations* page appears.

## Complete the Details Tab

1. From the *Ticket Escalations* page, click **Add New Ticket Escalation**.



The *Add New Ticket Escalation* page appears.

2. In the **Name** field, enter the name of the escalation.
3. In the **Priority** field, enter a numeric value for the priority, to determine the order tickets are run. Escalations are evaluated in ascending order of priority. If two or more share the same priority, they are ordered alphabetically.
4. In the **Interval** field, enter the time period for how often the rules are checked, then select minutes, hours, days or weeks for at least a five minute interval.

On this page:

On this page:

- [Access the Ticket Escalations Page](#)
- [Complete the Details Tab](#)
- [Complete the Times Tab](#)
- [Complete the Rules Tab](#)
- [Complete the Actions Tab](#)
- [Complete the Matching Tickets Tab](#)
- [Related Topics](#)

- In the **Enabled** field, select **Yes** to enable the ticket escalation.

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## Add New Ticket Escalation

Details Times Rules Actions Matching Tickets (9)

English(USA) Name: Accounts Receivable

Français canadien Name:

Português (Portugal) Name:

Priority: 1

Interval: 10 minute(s)

Enabled: ☒ Yes ☐ No

Save Save & New Cancel

## Complete the Times Tab

- Click the *Times* tab.
- In the **Days of the Month From** field, select the day of the month to begin polling existing tickets.
- In the **Days of the Month To** field, select the day of the month to end polling existing tickets.
- In the **Days of the Week** field, select one or more days of the week to include in the polling.
- In the **Times From** field, select the time of day to begin polling existing tickets.
- In the **Times To** field, select the time of day to end polling existing tickets.
- Click **add times** to add another polling time frame.
- Click **remove** to delete a polling time frame.

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## Add New Ticket Escalation

Details **Times** Rules Actions Matching Tickets (9)

Days of Month	Days of Week	Times
From: 1 To: 31	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	From: 00 To: 23 From: 09 To: 17

add times

Save Save & New Cancel

## Complete the Rules Tab

You can add as many rules to the escalation as needed, which is the criteria to identify when something needs to be done.

- Click the *Rules* tab.
- Select the **Department** field, then either **In** or **Not**, then select the desired department. This field will either include or not include the selected department for the escalation. See [Adding Support Departments](#) for more information.
- Select the **Classification** field, then either **In** or **Not**, then select the desired classification. This field will either include or not include the selected classification for the escalation. See [Adding Support Classifications](#) for more information.
- Select the **Type** field, then either **In** or **Not**, then select the desired ticket type. This field will either include or not include the selected type for the escalation. See [Adding Ticket Types](#) for more information.
- Select the **Priority** field, then either **In** or **Not**, then select the desired ticket priority. This field will either include or not include the selected priority for the escalation.
- Select the **Impact** field, then either **In** or **Not**, then select the desired ticket impact. This field will either include or not include the selected impact for the escalation.
- Select the **Assigned To** field, then either **In** or **Not**, then select the desired ticket assignment. This field will either include or not include the selected owner for the escalation.
- Select the **Client** field, then select the desired **Has Tag**. This field will include clients that have the selected tag on their account.
- Select the **Internal Ticket** field, then select **Yes** if the tickets you want to escalate are internal tickets. Select **No** if you want to escalate external tickets.
- Select the **Time to Resolution** field, then enter a start and end number in the **Between** fields. This field will include ticket resolution times for a specified range for escalation.
- Select the **Time to First Reply** field, then enter a start and end number in the **Between** fields. This field will include ticket first-reply times for a specified range for escalation.

12. Select the **Time to Reply** field, then enter a start and end number in the **Between** fields. This field will include general ticket reply times for a specified range for escalation.
13. Select the **Time to Last Update** field, then enter a start and end number in the **Between** fields. This field will include the last public comments or followup replies from either support or the client for the specified range for escalations.
14. Click the **add** icon to add additional rule fields.
15. Click the **trash** icon to delete rule fields.

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### Add New Ticket Escalation

Details Times **Rules** Actions Matching Tickets (0)

For tickets that match:

- ☐ Department: In Billing
- ☒ Classification: In Support
- ☒ Type: Not Closed Deleted
- ☐ Priority: In Low
- ☐ Impact: In None
- ☐ Assigned To: In (Unassigned)
- ☒ Subject: Contains billing Contains cost
- ☐ Client: Has Tag 4 hour response time
- ☐ Internal Ticket: ☐ Yes ☒ No
- ☐ Time to Resolution: Between and minutes
- ☐ Time to First Reply: Between and minutes
- ☐ Time to Reply: Between and minutes
- ☐ Time to Last Update: Between and minutes

Save Save & New Cancel

## Complete the Actions Tab

Once a rule is identified, the *Actions* tab determines the actions to take.

1. Click the *Actions* tab.
2. Select the **Change Type to** field, then select the ticket type to apply for the escalation. See [Adding Ticket Types](#) for more information.
3. Select the **Assign to** field, then select the user to assign the ticket to for the escalation.
4. Select the **Move to Department** field, then select the department for the escalation. Click **add department** to add a new department. See [Adding Support Departments](#) for more information.
5. Select the **Classify As** field, then select the ticket classification for the escalation. See [Adding Support Classifications](#) for more information.
6. Select the **Change Priority to** field, then select the ticket priority for the escalation.
7. Select the **Change Impact to** field, then select the ticket impact for the escalation.
8. Select the **Set custom fields** field, then select the appropriate custom field and its input. This field varies, based on your defined custom fields. See [Adding Custom Tickets Fields](#) for more information.
9. Select the **Send Email** field, then enter the **To**, **Subject**, **From**, and **Body** of the email. This sends an email for the escalation.
10. Select the **Set client association** field, then either select **Associate with client** and fill in the client ID or select **Remove client association**.
11. Select the **Automatically reply with** field, then select the type of reply and enter the **Subject**, **From**, and **Body** in order to send a comment that applies to the support ticket.

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### Add New Ticket Escalation

Details Times Rules **Actions** Matching Tickets (0)

Perform the following actions:

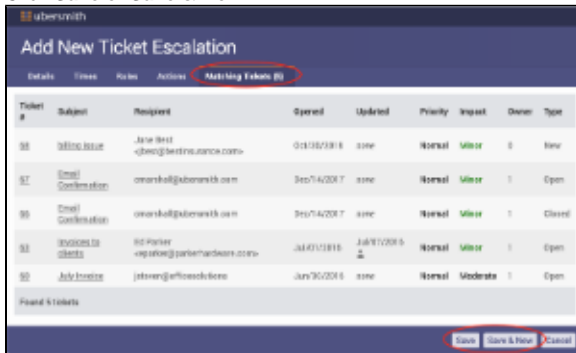
- ☐ Change Type to: New
- ☐ Assign to:
- ☒ Move to Department: Billing add department
- ☐ Classify As:
- ☐ Change Priority to: Low
- ☐ Change Impact to: None
- ☐ Set custom fields: Enable at left to specify custom fields.
- ☐ Send Email: Enable at left to specify email.
- ☐ Set client association: ☒ Associate with client ☐ Remove client association
- ☐ Automatically reply with: Enable at left to specify automatic response.

Save Save & New Cancel

## Complete the Matching Tickets Tab

The *Matching Tickets* tab displays all existing, open tickets that match your configured escalation rules. Check this page before saving to confirm the escalation will affect the desired tickets.

1. Click the *Matching Tickets* tab. A list of tickets that match the configured rules appears.
2. Select a ticket to open it in the *Support Manager*, if desired.
3. Click **Save** or **Save & New**.



Ticket #	Subject	Recipient	Opened	Updated	Priority	Impact	Owner	Type
88	billing issue	Jane Reid <jreid@bestinsurance.com>	Oct 18/2018	none	Normal	Minor	0	Open
97	Email Confirmation	osankul@ubonankb.com	Sep 7/4/2017	none	Normal	Minor	1	Open
99	Email Confirmation	osankul@ubonankb.com	Sep 7/4/2017	none	Normal	Minor	1	Closed
33	insurance clients	Jed Porter <jporter@parishadecore.com>	Jul 4/1/2018	Jul 8/1/2018	Normal	Minor	1	Open
99	July Invoice	jporter@parishadecore.com	Jun 30/2018	none	Normal	Moderate	1	Open

Found 6 tickets

[Save](#) [Save & New](#) [Cancel](#)

## Related Topics

[Managing Support Ticket Escalations](#)