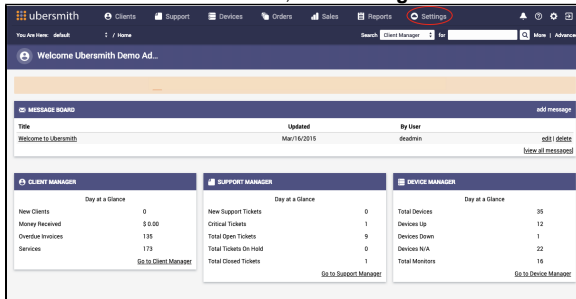


# Adding Support Filters

Ticket filters allow you to direct and modify incoming requests to the *Support Manager* based on a variety of criteria. For example you can delete spam email or move billing questions to a billing department.

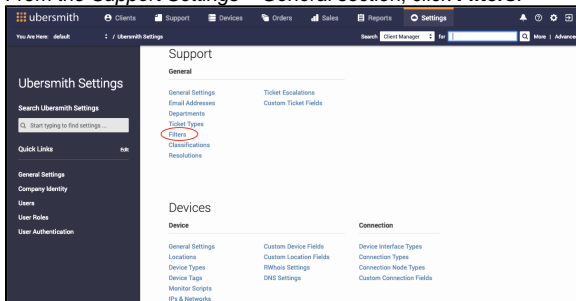
## Accessing the Filters page

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



The *Ubersmith Settings* page appears.

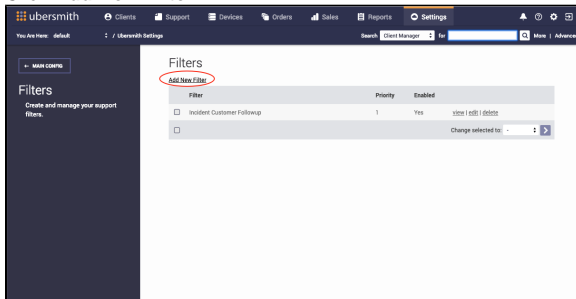
2. From the *Support Settings – General* section, click **Filters**.



The *Filters* page appears.

## Complete the Details Tab

1. Click **Add New Filter**.



The *Add Filter* page appears.

2. In the **Filter Name** field, enter the name of the filter.
3. In the **Filter Priority** field, enter the priority number to define what order the filter will be used. Filters with a lower priority, such as 1, will run first.

### On this page:

On this page:

- [Accessing the Filters page](#)
- [Complete the Details Tab](#)
- [Complete the Rules Tab](#)
- [Complete the Actions Tab](#)
- [Related Topics](#)

4. In the **Enabled** field, select **Yes** to enable the filter.

## Complete the Rules Tab

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

1. Click the **Rules** tab.
2. In the **For messages that match** field, select **All** if you want filtering to happen when all the defined rules have been met or select **Any of the following** if you want filtering to happen when one or more of the rules have been met.
3. In the **first** field, select the part of the email you want to look at, either **Sender**, **Subject**, **Body**, **To**, or **CC**. Click **edit** to select a specific part.
4. In the **middle** field select the matching criteria, either **Contains**, **Does Not Contain**, **Is**, **Is Not** or **Regex** (regular expression).
5. In the **last** field, enter the specific criteria to look for to complete the total filter identification.
6. Click **add match**.

## Complete the Actions Tab

Once an email is identified, the *Actions* tab determines the actions to take.

1. Click the **Actions** tab.
2. Select **Change Status** to then select the status. See [Adding Ticket Types](#).
3. Select **Assign to** and then select the user.
4. Select **Move to Department** and then select the department or click add department. See [Adding Support Departments](#).
5. Select **Classify As** and then select the support classification. See [Adding Support Classifications](#).
6. Select **Change Priority to** then select the appropriate ticket priority, either Low, Normal, High, or 911 (emergency).
7. Select **Change Impact to** then select the appropriate impact, either None, Minor, Moderate, Significant, or Extensive.
8. Select **Set custom field** and then select the appropriate custom field. See [Adding Support Custom Fields](#).
9. Select **Email a copy to** then enter the email address.
10. Select **Set client association** and then select either Associate to client [client name] or Remove client associate.
11. Select **Automatically reply with** and then enter the text to return to the sender.

12. Click **Save** or **Save & New**.

ubersmith

## Add Filter

Details Rules **Actions**

Perform the following actions:

- ☐ Change Status to: New
- ☐ Assign to:
- ☒ Move to Department: Billing [add department](#)
- ☐ Classify As:
- ☒ Change Priority to: Normal
- ☐ Change Impact to: None
- ☐ Set custom field: Enable at left to specify custom field.
- ☐ Email a copy to:
- ☐ Set client association:
  - ☒ Associate with client:
  - ☐ Remove client association
- ☒ Automatically reply with:

This is an automatic confirmation. We have received your request for billing information.

[View Variables](#)

☐ Stop processing filters

**Save** **Save & New** Cancel

## Related Topics

[Managing Support Filters](#)