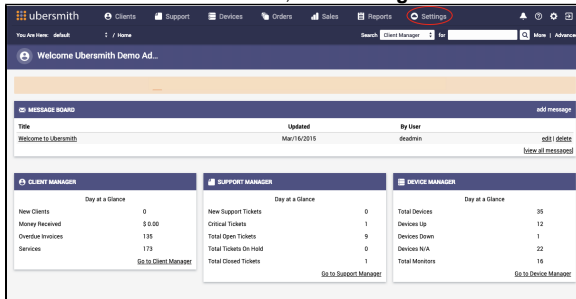


Adding Support Filters

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.

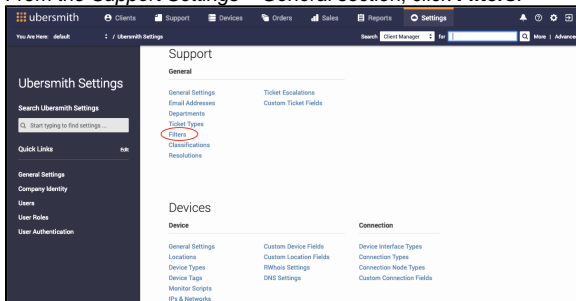
Accessing the Filters page

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



The *Ubersmith Settings* page appears.

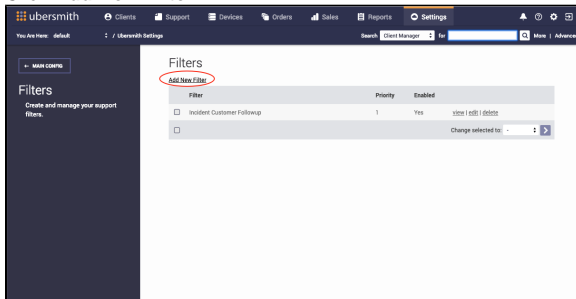
2. From the *Support Settings – General* section, click **Filters**.



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.

The screenshot shows the 'Add Filter' form in the 'Details' tab. The 'Enabled' field is set to 'Yes'. The 'Filter Name' field is labeled 'English(USA) Filter Name:' and contains the text 'billing'. There are also fields for 'Français canadien Filter Name:' and 'Português (Portugal) Filter Name:'. The 'Filter Priority' is set to '1'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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**.

The screenshot shows the 'Add Filter' form in the 'Rules' tab. The 'For messages that match' field is set to 'All'. There are two rules added: 'Subject contains billing' and 'Sender contains'. Each rule has a 'remove' button. At the bottom, there is an 'add match' button and 'Save', 'Save & New', and 'Cancel' buttons.

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](#)