SLA Plans

SLA plans are a way of guaranteeing a level of service you will provide to customers and providing targets to staff by defining times that a ticket must be answered and resolved by. SLA plans can incorporate schedules to ensure due times only factor working hours (excluding defined holidays).

Setting SLA Plan Priority

SLA plans are processed in order of priority (from first to last), this can be changed by dragging and dropping rows on the grid to the order you prefer.

Searching for SLA Plans

Filtering the table

It's possible to search for filters based on their name and description:

1. Visit **Settings -> Tickets -> SLA Plans** and click "Filter Results".
2. Search terms:
    1. **Name** - It is possible to search for partial names. For example, you could find "Local Clients" by searching for "loca" or "lient".
    2. **Description** - The SLA plan description.
3. The table will be filtered automatically as you enter search terms.

Creating or Updating an SLA plan

To create a new SLA plan, or update an existing one, please follow the following steps.

1. Visit **Settings -> Tickets -> SLA Plans**. If you're creating a new plan click "Add SLA Plan", or if you're updating an existing

   SLA plan, search for it and click the edit (pencil) icon on the right side of the table row.
2. Complete the input fields:

   1. **Name** - A unique name used to identify the SLA plan.
   2. **Description** - A description of the SLA plan.
   3. **Schedules** - If the SLA plan covers calendar hours (24 hours a day) or uses work schedules (See [redacted]) when calculating the due time of a ticket. If choose schedules, start to type the schedule name in the input box that appears and select the schedule, multiple schedules can be used.
   4. **SLA Targets** - Allow you to set a target time for different actions on the ticket per priority. The possible targets are:
      1. **First Reply Time** - The time it takes for an operator to respond to the ticket since it was opened. For internal tickets, this is a reply by an operator other than the creator of the ticket.
      2. **Next Reply Time** - The time it takes for an operator to respond after the user's last unanswered reply (but after an operator has responded on the ticket at least once). For internal tickets, this is a reply by an operator other than the creator of the ticket.
      3. **Resolution Time** - The time it takes to close the

      Times can be left blank to not set a due time for that target/priority. Ensure the targets set for "First Reply Time" or "Next Reply Time" are sufficiently lower than the targets set for "Resolution Time".
   5. **SLA Conditions** - Used to limit the scope of the search criteria.
      1. **Condition Groups** - Condition groups are sets of search criteria. They can be combined using the

adjacent drop-down menu using "All groups can be true" or "Any group can be true". A simple example of this roughly translated to English might be: "The ticket must be Open and have Critical priority" (group 1) OR "The ticket must be In Progress and have Critical priority" (group 2). This would match tickets that are either Open or In Progress and have Critical priority.

2. **Conditions** - Conditions belong to condition groups and define the search criteria. You can select the condition item (for example "Ticket Status"), followed by the condition operator (for example "Equals"), followed by the condition

For example, you may wish to create an SLA plan which targets all tickets that are opened in the Support department and the user is part of the Important user group:

1. Click "Add Condition Group".
2. Select "Ticket department" from the first drop-down menu, followed by "Is" and input "Support" in the final input box.
3. Click "Add Condition".
4. Select "User Group", followed by "Is", followed by "Important".
5. Select "All conditions in group must be true", roughly translated to English: "The ticket must be in the Support department and the user must be part of the Important user group".

6. **Escalation Rules** - Used to define what actions should take place when a ticket becomes or is about to become overdue. It can specifically target the reply (first reply/next reply) due time or the resolution due time. For example, you may wish to email operators an hour before becoming overdue and then add a reply to the

ticket when it becomes overdue.

    1. Click "Add Rule".
    2. Select "Hours before overdue" in the drop-down menu that appears under "When", and enter 1 in the textbox that appears to the left of the drop-down menu.
    3. Select the email template you wish to send, this requires setting up a custom email template (See Email Templates).
    4. Select "Send email to operators" in the drop-down menu that appears under "Action".
    5. Click "Add Rule".
    6. Select "Add ticket reply" in the drop-down menu that appears under "Action".
    7. Enter the text that you wish to send to the user in the textarea.

3. Click the "Submit" button.

The 'Add Ticket Note' and 'Add Ticket Reply' actions will use the operator who created or last updated the SLA plan as the author of the message.

Deleting a SLA Plan

Deleting SLA plans is an irreversible action. Tickets that currently fall under that SLA plan will no longer have any plan but may still have a due time, the due time will only be cleared once the ticket has been resolved. We recommend to ensure no tickets fall under the SLA plan before considering deleting it.

To delete an SLA plan, follow the below steps:

1. Visit **Settings -> Tickets -> SLA Plans**
2. Search for the plan you wish to delete (see [redacted]).

3. Click the delete (cross) icon located on the right of the table.
4. Click on the left button, "Yes, Delete SLA Plan", that pops up confirming you would like to delete this SLA plan, and it will then be deleted.