Macros

Macros let you run multiple actions on a ticket with a single click manually or automatically, through the cron job or hook points. Macros are useful for common updates made on tickets.

The macros are divided into three sections by their type: manual, automatic and hook.

Ordering Macros

Manual macros are ordered as shown in the grid, whereas automatic and hook macros 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 Macros
Table sorting

By default the table is sorted alphabetically by the name. Once the table has loaded you're able to change the sort column by clicking the up/down arrows:

- Down arrow: descending order
- Up arrow: ascending order

Filtering the table

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

1. Visit **Settings -> Tickets -> Macros** and click "Filter Results".
2. Search terms:
   1. **Name** - It is possible to search for partial names. For example, you could find "Working On" by searching for "worki" or "ng on".
   2. **Description** - The macro description.

3. **Enabled** - If the macro is enabled in the system.
3. The table will be filtered automatically as you enter search terms.

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

1. Visit **Settings -> Tickets -> Macros**. If you're creating a new macro click "Add Macro", or if you're updating an existing macro, search for it and click the edit (pencil) icon on the right side of the table row.
   Manual macros that are private cannot be edited by other operators.

2. Complete the input fields:
   1. **Name** - A unique name used to identify the macro.
   2. **Description** - A description of the macro.
   3. **Enabled** - Disabling the macro will make it not visible in the interface and prevent it from being ran automatically.
   4. **Type** - How the macro will be ran.

      - **Manual** - Manual macros require clicking in the ticket view to run, and can be run multiple times.
      - **Automatic** - Automatic macros will run on the cron job on matching non-resolved tickets at most once an hour.
      - **Hook** - Hook macros run on specified ticket events, such as on a user ticket reply.
   5. **Public** - Only applies to manual macros, if the macro can be used by other operators.
   6. **Operator Groups** - Only applies to manual macros, you can limit the macro to only selected operator groups. Only applies if the public field is set to Yes, leaving this

field blank will mean the macro is available to all operators.

7. **Run At Most** - Only applies to automatic macros, can set a limit to the number of times a macro will run on a given ticket. Leave blank to let it run an unlimited number of times.

8. **Events** - Only applies to hook macros, set the ticket events on which the macro will run. It will check the below conditions before applying the actions on the ticket.

9. **Schedules** - Only applies to automatic and hook macros, set help desk schedules if you wish for the macro to only run during certain periods of the week. Leave blank to allow the macro to run 24/7.

10. **Macro 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 a macro which targets all tickets that were opened in the last 24 hours and still haven't been resolved:

1. Click "Add Condition Group".
2. Select "Hours since Created" from the first drop-down menu, followed by "Less than" and input "24" in the final input box.
3. Click "Add Condition".
4. Select "Ticket Status", followed by "Is", followed by "Open".
5. Select "All conditions in group must be true", roughly translated to English: "The ticket must have been created less than 24 hours ago and have its status set to Open".

11. **Macro Actions** - Used to define what actions should take place when the macro is run.
    For example, you may wish to create a macro which adds a note and assigns an operator to a ticket.
    1. Click "Add Action".
    2. Enter the text for the note in the textarea that appears.
    3. Click "Add Action".
    4. Select "Assign operator to ticket" in the drop-down menu that appears under "Action".
    5. Select the operator you wish to assign the ticket to in the following drop-down that appears under "Value".

3. Click the "Submit" button.

For automatic and hook macros, the 'Add ticket note', 'Add ticket reply' and 'Forward ticket' actions will use the operator who created or last updated the macro as the author of the message.

Manual macros that are private cannot be deleted by other operators.

If you wish to stop a macro running temporarily, consider disabling the

macro first instead of deleting it.

To delete a macro, follow the below steps:

1. Visit **Settings -> Tickets -> Macros**
2. Search for the macro you wish to delete (see).
3. Click the delete (cross) icon located on the right of the table.
4. Click on the left button, "Yes, Delete Macro", that pops up confirming you would like to delete this macro and it will then be deleted.