

Streamline Ticket Handling by Leveraging Ticketing Rules: Best Practice Guide

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Introduction

Description	This guide provides recommended examples for implementation of Ticketing Custom Variables in Ticketing Rules
Scope	The examples presented in this guide discuss Ticketing Rules that affect internal ticketing workflows
Applicable products	All LivePerson products which include the Ticketing System
Who should use this guide?	This guide is targeted towards system administrators tasked with creating and maintaining LivePerson's Ticketing Rules
Duration	Approximately 60 minutes
Prerequisites	<ul style="list-style-type: none">- Familiarity with LivePerson's Rule Engine- Familiarity with your website's existing Custom Variables

Steps to Success

This guide provides a list of recommended best practices for creating and using Ticketing Rules with Ticketing Custom Variables. Ticketing Rules can help streamline your processes by automatically evaluating tickets and emails that go through your system. You can improve and shorten ticket handling times by implementing these tried-and-true best practices. Allow yourself approximately 60 minutes to learn the recommended best practices presented in this guide. Follow the step-by-step description to implement these best practices on your account.

Overview

The following table summarizes the best practices covered in this guide:

Goal	Best Practice	Page
Ensuring timely customer assistance	Show Last Action status for a ticket Identify customers waiting for reply	5
Adjusting level of service according to customer information	Identify "Unhappy" customers Transfer VIP tickets to Experts Track communications with VIP customers Identify High-Risk VIP customers Prioritize customer inquiries	13
Ensuring ticket data retention	Maintain VIP tickets in database	33

Each best practice is a standalone procedure that includes the following components:

- What will you learn?
- What will you need?
- How to do it?

Note: Each procedure also indicates who should carry it out - an Administrator or a Manager.

Unit 1: Ensuring Timely Customer Assistance

The best practices presented in this unit are designed to assist managers in ensuring agents handle tickets in a timely fashion. After the administrator implements these best practices, the manager could perform a daily search for tickets of customers who are waiting for reply, and ensure agents are working toward a fast resolution of the customers' inquiries.

Show Last Action Status for a Ticket

A ticket status can be set to indicate the last interaction performed on the ticket (incoming message/outgoing message). The manager can then perform daily searches to follow up on all tickets in which the ticket status is Incoming (i.e. the customer has not received a reply).

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the email correspondence. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and used for reporting purposes.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will set the ticket's Last Action Status to Incoming when the last email interaction performed on the ticket is a message received from the customer (Administrator Procedure)

Note: *The ticket's Last Action Status will be indicated by the value of a new Ticket Scope Custom Variable named **lastaction**. You will create the **lastaction** Custom Variable in one of the steps of creating the rule.*

- Create the rule that will set the ticket's Last Action Status to Outgoing when the last email interaction performed on the ticket is a message sent to the customer (Administrator Procedure)
- Perform the daily ticket search to find all tickets in which the Ticket Scope Custom Variable named **lastaction** is set to Incoming (Manager procedure)

What do you need?

- Access to your account's Admin Console (Click [here](#))
- Access to your account's Agent Console

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition - To trigger the rule for all messages and tickets, leave the condition of the new rule unspecified. The rule will **always** fire.
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Custom Variables**
 - In the Variable Name text field, enter **lastaction**
 - In the Variable Value text field, enter **Incoming**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Set Ticket Status to Incoming

Description: Set the Ticket Status to Incoming when the last email on the ticket is an incoming email from the customer.

Rule Type: When a message is received

Status: Enabled

If All of the following conditions are true:

[Add Condition](#)

Then perform these actions:

set ticket variable 'lastaction' = 'Incoming'	Edit	
---	----------------------	--

[Add Action](#)

Stop processing after this rule

[Update All](#) [Cancel](#)

Figure 1: Set Ticket Status to Incoming

2. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When sending an email**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition - To trigger the rule for all messages and tickets, leave the condition of the new rule unspecified. The rule will always fire.
 - e. Set the rule action:
 - o Click **Add Action**
 - o From the Choose Type drop-down list, select **Variables**
 - o From the Action drop-down list, select **Set Ticket Custom Variables** In the Variable Name text field, enter **lastaction**
 - o In the Variable Value text field, enter **Outgoing**
 - o Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Set Ticket Status to Outgoing

Description: Set the Ticket Status to Outgoing when the last email on the ticket is an outgoing email to the customer.

Rule Type: When sending an email

Status: Enabled

If **All** of the following conditions are true:

[Add Condition](#)

Then perform these actions:

set ticket variable 'lastaction' = 'Outgoing'	Edit	
---	----------------------	--

[Add Action](#)

Stop processing after this rule

Figure 2: Set Ticket Status to Outgoing

Manager Procedure:

The following procedure discusses how to search for tickets for which the Custom Variable named lastaction is set to Incoming.

1. **Log into** the Agent Console.
2. Click **Search**. The **Search** panel is displayed.
3. Click the **Advanced Search** link.
4. In the Advanced Ticket Settings window, perform the search as presented in the figure below.

The screenshot shows the 'Advanced Search Settings' dialog box. The 'Status' dropdown menu is open, showing options: Not Started, Pending Customer, Pending Internal, and Resolved. The 'Custom Variable' section is highlighted with an orange border, showing 'Name: lastaction' and 'Value: Incoming'. The 'Date Modified' is set to 'Last 12 months'. At the bottom, there are buttons for 'Help', 'Search', 'Cancel', and 'Reset'.

Figure 3: Advanced Search Settings window - Search for tickets by value of Custom Variable

What can you do next?

Once the manager has found all tickets in which customers are waiting for reply, he can:

- Ensure the ticket is handled by the assigned agent and that a reply is sent to the customer in a timely fashion
- Transfer the ticket to another agent or skill, best equipped to handle the inquiry

Identify Customers Waiting for Reply

When a customer sends two consecutive email messages, it is a good indication that agents have not responded to the first email the customer has sent. You can identify such tickets and automatically transfer them to the manager to ensure timely ticket handling and replies to inquiries.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the email correspondence. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and used for reporting purposes.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will set the ticket's Last Action Status to Incoming when the last email interaction performed on the ticket is a message received from the customer (Administrator Procedure)

Note: *The ticket's Last Action Status will be indicated by the value of a new Ticket Scope Custom Variable named lastaction. You will create the lastaction Custom Variable in one of the steps of creating the rule.*

- Create the rule that will set the ticket's Last Action Status to Outgoing when the last email interaction performed on the ticket is a message sent to the customer (Administrator Procedure)
- Create the rule that will automatically assign tickets in which the customer has sent two consecutive email messages to the Managers skill (Administrator Procedure)

What do you need?

- Access to your account's Admin Console (Click [here](#))
- Access to your account's Agent Console

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition - To trigger the rule for all messages and

- tickets, leave the condition of the new rule unspecified. The rule will **always** fire.
- e. Set the rule action:
 - Click Add Action
 - From the Choose Type drop-down list, select Variables
 - From the Action drop-down list, select Set Ticket Custom Variables
 - In the Variable Name text field, enter lastaction
 - In the Variable Value text field, enter Incoming
 - Click the green checkmark to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Set Ticket Status to Incoming

Description: Set the Ticket Status to Incoming when the last email on the ticket is an incoming email from the customer.

Rule Type: When a message is received

Status: Enabled

If **All** of the following conditions are true:

[Add Condition](#)

Then perform these actions:

set ticket variable 'lastaction' = 'Incoming' [Edit](#) [Delete](#)

[Add Action](#)

Stop processing after this rule

[Update All](#) [Cancel](#)

Figure 4: Set Ticket Status to Incoming

2. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When sending an email**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition - To trigger the rule for all messages and tickets, leave the condition of the new rule unspecified. The rule will **always** fire.
 - e. Set the rule action:
 - Click **Add Action**

- o From the Choose Type drop-down list, select **Variables**
 - o From the Action drop-down list, select **Set Ticket Custom Variables**
 - o In the Variable Name text field, enter **lastaction**
 - o In the Variable Value text field, enter **Outgoing**
 - o Click the **green checkmark** to finalize the action
- f. Click **Update All** to add the new rule.
- g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Set Ticket Status to Outgoing

Description: Set the Ticket Status to Outgoing when the last email on the ticket is an outgoing email to the customer.

Rule Type: When sending an email

Status: Enabled

If **All** of the following conditions are true:

[Add Condition](#)

Then perform these actions:

set ticket variable 'lastaction' = 'Outgoing' [Edit](#) [Delete](#)

[Add Action](#)

Stop processing after this rule

[Update All](#) [Cancel](#)

Figure 5: Set Ticket Status to Outgoing

3. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - o Click **Add Condition**
 - o From the Choose Type drop-down list, select **Variables - Ticket Custom Variables**
 - o In the Variable Name text field, enter **lastaction**
 - o From the operator drop-down list, select **equal to**
 - o In the Variable Value text field, enter **Incoming**
 - o Click the **green checkmark** to finalize the condition
 - e. Set the rule action:

- Click **Add Action**
- From the Choose Type drop-down list, select **Tickets**
- From the Action drop-down list, select **Assign to Skill**
- From the Assign to Skill drop-down list, select **Managers**
- Click the **green checkmark** to finalize the action
- f. Click **Update All** to add the new rule.
- g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Assign tickets with two consecutive incoming emails to

Description: Assign tickets in which two emails have been sent by the customer without receiving a reply to the managers skill.

Rule Type: When a message is received

Status: Enabled

If All of the following conditions are true:

the value of ticket custom variable 'lastaction' is equal to 'Incoming'	Edit	🗑️
Add Condition		

Then perform these actions:

assign to skill 'Managers'	Edit	🗑️
Add Action		

Stop processing after this rule

Figure 6: Assign tickets with two consecutive incoming emails to the Managers skill

What can you do next?

Once the ticket has been assigned to the managers, they can:

- Continue handling the ticket themselves, ensuring a fast resolution of the inquiry and a reply to the customer
- Transfer the ticket to another agent or skill, best equipped to handle the inquiry and a reply to the customer

Unit 2: Adjusting Level of Service According to Customer Information

The best practices presented in this unit are designed to assist managers in ensuring customer satisfaction and proper handling of tickets of VIP customers. The following actions could be taken after the administrator implements these best practices:

- The manager could be automatically informed of tickets of customers who display dissatisfaction and perform a daily search for tickets of VIP customers. He could then make sure that the appropriate agents adjust their approach when communicating with these customers, both to improve satisfaction and to maintain a good relationship with these valued customers.
- The manager could be automatically informed of VIP tickets that are flagged as High-Risk due to the content of new email correspondence. He could then make sure that the VIP customer is receiving the appropriate assistance to ensure customer satisfaction and retention.
- Tickets with different levels of urgency could be automatically routed to different skills, and handled according to the appropriate service level. The manager could search for tickets that have been routed according to their level of urgency, but have exceeded their expected time for handling.

Identify Unsatisfied Customers

Unsatisfied customers can be identified by the content of their email correspondence with your agents. Check incoming emails for words which indicate displeasure, such as Cancel, Unsubscribe or Terminate, and automatically send an email to the manager, informing of the unsatisfied customer. The manager could assign an agent to follow up on the customer's inquiry and adjust the service approach to win the customer back.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the email correspondence. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and trigger specific actions to streamline workflows.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will both flag a ticket of an unsatisfied customer when the content of incoming email messages has specific "Unhappy" keywords and notify the manager by email of tickets with "Unhappy" keywords in its correspondences (Administrator Procedure)

Note: A new Ticket Scope Custom Variable, named *unsatisfied*, will be used to indicate whether the ticket has email correspondence with the mention keywords. You will create the *unsatisfied* Custom Variable in one of the steps of creating the rule.

What do you need?

Access to your account's Admin Console (Click [here](#))

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Messages Incoming - Any Type - Subject or Body**
 - From the Subject or body of last incoming message contains drop-down list, select **the regular expression**
 - In the text field, enter the expression **(?)cancel|unsatisfied|unsubscribe|terminate**

Notes:

- I. The **|** used in regular expressions stand for 'or'. For example, using the regular expression **"a|b"** is equivalent to using **"a or b"**.
 - II. The **'(?)'** used in regular expressions allows for case-insensitive character strings. For example, using the regular expression **"(?)cancel"** will check for both **"cancel"** and **"Cancel"**.
 - II. You can enter any keyword your organization associates with **unsatisfied** customers. Separate the keyword with the **|** symbol to search for any of the keywords.
-

- Click the **green checkmark** to finalize the condition
- e. Set the rule actions:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Flag Variable**
 - In the Flag Name text field, enter **unsatisfied**
 - In the State drop-down list, select **On**

- Click the **green checkmark** to finalize the action
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Email**
 - From the Action drop-down list, select **Forward Message by Mail**
 - In the Forward Incoming Email To text field, enter the **manager's email address** (for example, manager@finerwine.com)
 - In the From text field, enter the **administrator's email address** (for example, admin@finerwine.com)
 - From the drop-down list, select Include. The ticket itself will be attached to the email to the administrator.
 - Click the green checkmark to finalize the action
- f. Click **Update All** to add the new rule.
- g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Identify "Unhappy" customers and notify manager

Description: Identify "unhappy" customers according to keywords in email correspondence and notify manager by email

Rule Type: When a message is received

Status: Disabled

If All of the following conditions are true:

subject or body of last incoming message contains the regular expression '(?) cancel unsatisfied unsubscribe terminate'	Edit	🗑️
Add Condition		

Then perform these actions:

set 'unsatisfied' ticket flag On	Edit	🗑️
Forward incoming email to 'manager@finerwine.com' from 'admin@finerwine.com'. Include a copy of the ticket.	Edit	🗑️
Add Action		

Stop processing after this rule

Update All Cancel Reorder Actions

Figure 7: Flag tickets in which Email correspondence has "Unhappy" keywords and notify the manager

What can you do next?

Once the manager has been notified of the unsatisfied customer, he can:

- Ensure the agent assigned to ticket adjusts his approach when communicating with the customer
- Transfer the ticket to another agent or skill, best equipped to handle the inquiry and a reply to the customer

Transfer VIP Tickets to Experts

Customers can be segmented according to their answers to questions on surveys and webforms. You can then offer different levels of service to different segments of your customer base. For example - have your more experienced agents handle tickets of VIP customers.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the content of surveys attributed with the ticket. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and trigger specific actions to streamline workflows.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will flag a ticket of a VIP when the customer's answer to a question on a webform - "What is your estimated budget?" is \$5000 (Administrator Procedure)

Note: *A new Ticket Scope Custom Variable, named VIPLevel, will be used to indicate whether the ticket has email correspondence with the mention keywords. You will create the VIPLevel Custom Variable in one of the steps of creating the rule.*

- Create the rule that will automatically transfer tickets from VIP customers to a specific skill (Administrator Procedure)

Notes:

- I. *Custom Variables which derive their values from webforms and surveys are Message Scope Custom Variables.*
- II. *For the purpose of this example, we assume that the Message Scope Custom Variable assigned to the question "What is your estimated budget?" on the webform is named survey1234*

What do you need?

Access to your account's Admin Console (Click [here](#))

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - In the Value of the message variable text field, enter **survey1234**
 - From the assigned to drop-down list, select any incoming
 - From the operator drop-down list, select **equal to**
 - In the Variable Value text field, enter **5000**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Flag Variable**
 - In the Flag Name text field, enter **VIPLevel**
 - In the State drop-down list, select **On**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Flag VIP Tickets

Description: When a customer's answer to "What is your estimated budget?" is "5000", flag the ticket as VIP

Rule Type: When a message is received

Status: Enabled

If **All** of the following conditions are true:

the value of message variable 'survey1234' assigned to 'any incoming' message on this ticket is equal to '5000'	Edit	🗑️
Add Condition		

Then perform these actions:

set 'VIPLevel' ticket flag On	Edit	🗑️
Add Action		

Stop processing after this rule

Update All Cancel

Figure 8: Flag VIP tickets

2. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When ticket enters any skill queue**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variables - Ticket Flag Variable**
 - In the Ticket Flag Name text field, enter **VIPLevel**
 - From the drop-down list, select **On**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Tickets**
 - From the Action drop-down list, select **Assign to Skill**
 - From the assign to skill drop-down list, select the **name of the skill** who should handle VIP customers. For example, VIP Sales.
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name:

Description:

Rule Type:

Status:

If **of the following conditions are true:**

the ticket flag variable 'VIPLevel' is On	Edit	
Add Condition		

Then perform these actions:

assign to skill 'VIP Sales'	Edit	
Add Action		

Stop processing after this rule

Figure 9: Assign VIP tickets to the VIP Sales skill

What can you do next?

Once the ticket is assigned to the appropriate skill, the agent can adjust his approach when communicating with the customer to ensure the high-value sale is complete.

Track Communications with VIP Customers

Customers can be segmented according to their answers to questions on surveys and webforms. You could allow the manager to keep a closer eye on outgoing emails sent to these customers, to ensure they are provided with a high level of service.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the content of surveys attributed with the ticket. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and trigger specific actions to streamline workflows.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will flag a ticket of a VIP when the customer's answer to a question on a webform - "What is your estimated budget?" is \$5000 (Administrator Procedure)

Note: *A new Ticket Scope Custom Variable, named VIPLevel, will be used to indicate whether the ticket has email correspondence with the mention keywords. You will create the VIPLevel Custom Variable in one of the steps of creating the rule.*

- Create the rule that will automatically add the manager as BCC on outgoing emails sent to VIP customers (Administrator Procedure)

Notes:

- I. *Custom Variables which derive their values from webforms and surveys are Message Scope Custom Variables.*
 - II. *For the purpose of this example, we assume that the Message Scope Custom Variable assigned to the question "What is your estimated budget?" on the webform is named survey1234.*
-

What do you need?

Access to your account's Admin Console (Click [here](#))

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - In the Value of the message variable text field, enter **survey1234**
 - From the assigned to drop-down list, select **any incoming**
 - From the operator drop-down list, select **equal to**
 - In the Variable Value text field, enter **5000**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Flag Variable**
 - In the Flag Name text field, enter **VIPLevel**
 - In the State drop-down list, select **On**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Flag VIP Tickets

Description: When a customer's answer to "What is your estimated budget?" is "5000", flag the ticket as VIP

Rule Type: When a message is received

Status: Enabled

If All of the following conditions are true:

the value of message variable 'survey1234' assigned to 'any incoming' message on this ticket is equal to '5000'	Edit	🗑️
Add Condition		

Then perform these actions:

set 'VIPLevel' ticket flag On	Edit	🗑️
Add Action		

Stop processing after this rule

Update All Cancel

Figure 10: Flag VIP tickets

2. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When sending an email**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variables - Ticket Flag Variable**
 - In the Ticket Flag Name text field, enter **VIPLevel**
 - From the drop-down list, select **On**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Email**
 - From the Action drop-down list, select **Add Recipient to Outgoing Email**
 - In the Recipient email address text field, enter the **manager's email address**. For example, manager@finerwine.com
 - From the drop-down list, select **BCC**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.

g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Add manager as BCC on outgoing email to VIPs

Description: Add the manager to correspondences with VIP customers.

Rule Type: When sending an email

Status: Enabled

If All of the following conditions are true:

the ticket flag variable 'VIPLevel' is On	--	🗑️
Add Condition		

Then perform these actions:

Add recipient email address 'manager@finerwine.com' to outgoing email as BCC	Edit	🗑️
Add Action		

Stop processing after this rule

[Update All](#) [Cancel](#)

Figure 11: Add manager as BCC on outgoing emails to VIP customers

What can you do next?

Once the manager is added as BCC on communications with VIP customers, he can:

- Review the correspondence to ensure agents provide VIP customers with a high level of service
- If required, inform the assigned agent that an improvement in the service he provides is called for

Identify High-Risk VIP Customers

VIP customers can be identified according to their answers to question on surveys and webforms. You can further identify those tickets that are both from VIP customers and have content indicating customer dissatisfaction or an inclination to leave your service. The manager could assign an agent to follow up on the customer's inquiry and adjust the service approach to ensure customer satisfaction and retention.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the content of surveys and email correspondence attributed with the ticket. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and trigger specific actions to streamline workflows.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will flag a ticket of a VIP when the customer's answer to a question on a webform - "What is your estimated budget?" is \$5000 (Administrator Procedure)

Notes:

- I. *Custom Variables which derive their values from webforms and surveys are Message Scope Custom Variables.*
- II. *For the purpose of this example, we assume that the Message Scope Custom Variable assigned to the question "What is your estimated budget?" on the webform is named survey1234.*
- II. *A new Ticket Scope Custom Variable, named VIPLevel, will be used to indicate whether the ticket has email correspondence with the mention keywords. You will create the VIPLevel Custom Variable in one of the steps of creating the rule.*

-
- Create the rule that will notify the manager of VIP tickets in which "Unhappy" keywords appear in the content of incoming email messages (Administrator Procedure)

What do you need?

Access to your account's Admin Console (Click [here](#))

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.

- b. From the Rule Type drop-down list, select **When a message is received**.
- c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
- d. Set the rule condition:
 - o Click **Add Condition**
 - o From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - o In the Value of the message variable text field, enter **survey1234**
 - o From the assigned to drop-down list, select **any incoming**
 - o From the operator drop-down list, select **equal to**
 - o In the Variable Value text field, enter **5000**
 - o Click the **green checkmark** to finalize the condition
- e. Set the rule action:
 - o Click **Add Action**
 - o From the Choose Type drop-down list, select **Variables**
 - o From the Action drop-down list, select **Set Ticket Flag Variable**
 - o In the Flag Name text field, enter **VIPLevel**
 - o In the State drop-down list, select **On**
 - o Click the **green checkmark** to finalize the action
- f. Click **Update All** to add the new rule.
- g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Flag VIP Tickets

Description: When a customer's answer to "What is your estimated budget?" is "5000", flag the ticket as VIP

Rule Type: When a message is received

Status: Enabled

If All of the following conditions are true:

the value of message variable 'survey1234' assigned to 'any incoming' message on this ticket is equal to '5000'	Edit	🗑️
Add Condition		

Then perform these actions:

set 'VIPLevel' ticket flag On	Edit	🗑️
Add Action		

Stop processing after this rule

Figure 12: Flag VIP tickets

2. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule conditions:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variables - Ticket Flag Variable**
 - In the Ticket Flag Name text field, enter **VIPLevel**
 - From the drop-down list, select **On**
 - Click the **green checkmark** to finalize the first condition
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Messages Incoming - Any Type - Subject or Body**
 - From the Subject or body of last incoming message contains drop-down list, select **the regular expression**
 - In the text field, enter the expression **(?i)cancel|unsatisfied|unsubscribe|terminate**

Notes:

- I. *The '|' used in regular expressions stand for 'or'. For example, using the regular expression "a|b" is equivalent to using "a or b". To set the spacing, select Paragraph Settings and then set Spacing Before and After to 6 pt.*
- II. *The '(?i)' used in regular expressions allows for case-insensitive character strings. For example, using the regular expression "(?i)cancel" will check for both "cancel" and "Cancel".*
- III. *You can enter any keyword your organization associates with unsatisfied customers. Separate the keyword with the | symbol to search for any of the keywords.*

- Click the **green checkmark** to finalize the second condition
- e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Email**
 - From the Action drop-down list, select **Forward Message by Mail**
 - In the Forward Incoming Email To text field, enter the **manager's email address** (for example, manager@finerwine.com)
 - In the From text field, enter the **administrator's email address**

- (for example, admin@finerwine.com)
- From the drop-down list, select **Include**. The ticket itself will be attached to the email to the administrator.
- Click the **green checkmark** to finalize the action
- f. Click **Update All** to add the new rule.
- g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name:

Description:

Rule Type:

Status:

If **of the following conditions are true:**

the ticket flag variable 'VIPLevel' is On	--	🗑️
subject or body of last incoming message contains the regular expression '(?) cancel unsatisfied unsubscribe terminate'	--	🗑️

[Add Condition](#)

Then perform these actions:

Forward incoming email to manager@finerwine.com from admin@finerwine.com. Include a copy of the ticket.	--	🗑️
---	----	----

[Add Action](#)

Stop processing after this rule

Figure 13: Notify the manager of VIP tickets in which emails have "Unhappy" keywords

What can you do next?

Once the manager has been notified of the unsatisfied VIP customer, he can:

- Ensure the agent assigned to ticket adjusts his approach when communicating with the customer
- Transfer the ticket to another agent or skill, best equipped to handle the inquiry and a reply to the customer

Prioritize Customer Inquiries

Customers inquiries can be prioritized according to customers' answers to questions on surveys and webforms. Tickets can then be automatically routed to the appropriate skill to be handled according to the urgency of the inquiry.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the content of surveys and email correspondence attributed with the ticket. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and trigger specific actions to streamline workflows.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will set the priority of the ticket according to the customer's answer to a question on a webform - "Please rate the urgency of your inquiry" (Administrator Procedure)

Notes:

- I. *Custom Variables which derive their values from webforms and surveys are Message Scope Custom Variables.*
- II. *For the purpose of this example, we assume that the Message Scope Custom Variable assigned to the question "Please rate the urgency of your inquiry" on the webform is named survey5678.*
- III. *A new Ticket Scope Custom Variable, named Urgency, will be used to indicate the level of urgency attributed with the ticket. You will create the Urgency Custom Variable in one of the steps of creating the rule.*

-
- Create the rule that will route the ticket to the appropriate skill according to the level of urgency (Administrator Procedure)

Note: *For the purpose of this example, we assume that your account already has the following skills set up - Support Priority 1, Support Priority 2 and Support Priority 3 - which handle support inquiries of different urgencies.*

What do you need?

Access to your account's Admin Console (Click [here](#))

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here

- you can enter the name of the new rule, its description and enable or disable it.
- d. Set the rule conditions:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - In the Value of the message variable text field, enter **survey5678**
 - From the assigned to drop-down list, select **any incoming**
 - From the operator drop-down list, select **equal to**
 - In the Variable Value text field, enter **Low**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Custom Variable**
 - In the Variable Name text field, enter **Urgency**
 - In the Variable Value text field, enter **Low**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.
2. Create a new rule in the Rule Engine:
- a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule conditions:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - In the Value of the message variable text field, enter **survey5678**
 - From the assigned to drop-down list, select **any incoming**
 - From the operator drop-down list, select **equal to**
 - In the Variable Value text field, enter **Medium**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Custom Variable**
 - In the Variable Name text field, enter **Urgency**
 - In the Variable Value text field, enter **Medium**

- Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.
 - 3. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule conditions:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - In the Value of the message variable text field, enter **survey5678**
 - From the assigned to drop-down list, select **any incoming**
 - From the operator drop-down list, select **equal to**
 - In the Variable Value text field, enter **High**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Custom Variable**
 - In the Variable Name text field, enter **Urgency**
 - In the Variable Value text field, enter **High**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name: Set ticket urgency to High

Description: Set the ticket urgency to high when the customer's answer to the question "Please rate the urgency of your inquiry" is "High"

Rule Type: When a message is received

Status: Enabled

If All of the following conditions are true:

the value of message variable 'survey5678' assigned to 'any' message on this ticket is equal to 'High'	--	🗑️
Add Condition		

Then perform these actions:

set ticket variable Urgency = High	--	🗑️
Add Action		

Stop processing after this rule

Figure 14: Set ticket urgency to High

4. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When ticket enters any skill queue**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule conditions:
 - o Click **Add Condition**
 - o From the Choose Type drop-down list, select **Variable - Ticket Custom Variable**
 - o In the Value of the ticket custom variable text field, enter **Urgency**
 - o From the operator drop-down list, select **equal to**
 - o In the Variable Value text field, enter **High**
 - o Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - o Click **Add Action**
 - o From the Choose Type drop-down list, select **Tickets**
 - o From the Action drop-down list, select **Assign to Skill**
 - o From the Skill drop-down list, select **Support Urgency 1**
 - o Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name:

Description:

Rule Type:

Status:

If **of the following conditions are true:**

the value of ticket custom variable 'Urgency' is equal to 'High'	Edit	
Add Condition		

Then perform these actions:

assign to skill 'Support Urgency 1'	Edit	
Add Action		

Stop processing after this rule

Figure 15: Route urgent tickets to the Support Urgency 1 skill

5. Repeat the steps in section 4 to route tickets marked as Urgency=Medium to the Support Urgency 2 skill, and tickets marked as Urgency=Low to the Support Urgency 3 skill.

What can you do next?

Once tickets are routed to the Support skills according to their urgency, the manager can search for all tickets that have been routed to a specific skill but have not been handled within the timeframe this skill is committed to. The manager can then ensure that the assigned agent handles the ticket and assists the customer.

Unit 3: Ensuring Ticket Data Retention

The best practice presented in this unit is designed to automate ticket maintenance in the database. After the administrator implements this best practice, attempts to trash tickets from VIP customers will be automatically overturned by the system.

Maintain VIP Tickets in Database

Tickets from a specific contact or with specific content can be set to remain in the system's database, even when attempting to send them to the trash (agents could decide to trash old tickets or tickets from customers who have cancelled your service, even though they may return). For example, you can keep your correspondences with VIP customers and not rely on agent's discretion for discarding of this important communication history.

Note: *Ticketing Custom Variables draw their values from ticket-related information, such as the content of surveys attributed with the ticket. The information stored in the Ticketing Custom Variables can then be evaluated by the Rules Engine and trigger specific actions to streamline workflows.*

What will you learn?

In this best practice procedure you will learn how to:

- Create the rule that will flag a ticket of a VIP when the customer's answer to a question on a webform - "What is your estimated budget?" is \$5000 (Administrator Procedure)

Note: *A new Ticket Scope Custom Variable, named VIPLevel, will be used to indicate whether the ticket has email correspondence with the mention keywords. You will create the VIPLevel Custom Variable in one of the steps of creating the rule.*

- Create the rule that will automatically prevent the ticket flagged as VIP tickets from being trashed (Administrator Procedure)

Notes:

- I. *Custom Variables which derive their values from webforms and surveys are Message Scope Custom Variables.*
 - II. *For the purpose of this example, we assume that the Message Scope Custom Variable assigned to the question "What is your estimated budget?" on the webform is named survey1234.*
-

What do you need?

Access to your account's Admin Console (Click [here](#))

How to do it?

Administrator Procedures:

1. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **When a message is received**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - Click **Add Condition**
 - From the Choose Type drop-down list, select **Variable - Message Custom Variable**
 - In the Value of the message variable text field, enter **survey1234**
 - From the assigned to drop-down list, select **any incoming**
 - From the operator drop-down list, select **equal to**
 - In the Variable Value text field, enter **5000**
 - Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - Click **Add Action**
 - From the Choose Type drop-down list, select **Variables**
 - From the Action drop-down list, select **Set Ticket Flag Variable**
 - In the Flag Name text field, enter **VIPLevel**
 - In the State drop-down list, select **On**
 - Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

TICKETING RULES

Name:

Description:

Rule Type:

Status:

If **of the following conditions are true:**

the value of message variable 'survey1234' assigned to 'any incoming' message on this ticket is equal to '5000'	Edit	
Add Condition		

Then perform these actions:

set 'VIPLevel' ticket flag On	Edit	
Add Action		

Stop processing after this rule

Figure 16: Flag VIP tickets

2. Create a new rule in the Rule Engine:
 - a. In the Admin Console, navigate to **Rules > Ticketing Rules**.
 - b. From the Rule Type drop-down list, select **After trashing a ticket**.
 - c. Click **Add Rule**. The new Ticketing Rules page is displayed. Here you can enter the name of the new rule, its description and enable or disable it.
 - d. Set the rule condition:
 - o Click **Add Condition**
 - o From the Choose Type drop-down list, select **Variables - Ticket Flag Variable**
 - o In the Ticket Flag Name text field, enter **VIPLevel**
 - o From the drop-down list, select **On**
 - o Click the **green checkmark** to finalize the condition
 - e. Set the rule action:
 - o Click **Add Action**
 - o From the Choose Type drop-down list, select **Ticket**
 - o From the Action drop-down list, select **Untrash Ticket and Requeue**
 - o Click the **green checkmark** to finalize the action
 - f. Click **Update All** to add the new rule.
 - g. Click **Submit All Changes** to save the new rule to the system.

The screenshot shows the 'TICKETING RULES' configuration page. The rule is named 'Untrash VIP tickets' with the description 'Revert attempts to trash tickets from VIPs.' The rule type is 'After trashing a ticket' and the status is 'Enabled'. The condition is 'If All of the following conditions are true: the ticket flag variable 'VIPLevel' is On'. The action is 'Then perform these actions: remove this ticket from trash and requeue'. There are 'Update All' and 'Cancel' buttons at the bottom.

Figure 17: Untrash VIP tickets

Appendix A: Glossary

Term	Description
Rule	A set of conditions and actions which are evaluated in a Rule Type. A rule may contain multiple conditions and multiple actions, or no conditions or no actions at all.
Rule Type	An evaluation point at which all rules assigned to that type are evaluated or tested.
Rule Condition	Defines the criteria and circumstances under which a specific rule will apply. If any (or all - depending on the settings in the rule) of the conditions are true, the actions for the rule will triggered. A rule can also have no conditions, in which case the rule's actions will be taken whenever the rule is evaluated.
Rule Action	The action that will be taken once the conditions defined for the rule are met.
Rule Outcome	The action or set of actions associated with a rule that will occur if a rule's condition(s) is evaluated as 'True'.
Custom Variable	Customized HTML code which stores a wide variety of data points the administrator wishes to track. For example, the username, account number, phone number or address of a customer.
Variable Value	The data element assigned to the Custom Variable. For example, the value "Fred" can be assigned to the Custom Variable Identifier.
Scope	The object (or channel) to which the Custom Variable is assigned.
Message Scope Custom Variables	Custom Variables that are assigned to a particular message in a ticket. Each Custom Variable can have at most one value per message. Message Custom Variables store data posted from message forms or surveys (name, email, subject, message etc.).
Ticket Scope Custom Variables	Custom Variables that can have one value per ticket (new values overwrite previous value). This is the default scope for Custom Variables set by the rule engine or from the Ticket Release survey.

Appendix B: Custom Variables in this Guide

Custom Variable	Variable Type	Value	Usage Description
lastaction	Ticket Custom Variable	Incoming/ Outgoing	Set the ticket status according to the last email interaction on the ticket - incoming email from the customer or outgoing email to the customer.
unsatisfied	Ticket Flag	On/Off	Flag tickets in which the content of incoming emails has "Unhappy" keywords.
VIPLevel	Ticket Flag	On/Off	Flag tickets in which the customer is identified as a VIP customer according to budget question in webform.
Urgency	Ticket Custom Variable	Low/Medium/High	Set the inquiry urgency according to urgency question in webform.

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