Ticket Rules & Automation Guide

Automate Ticket Processing with Pattern-Based Rules

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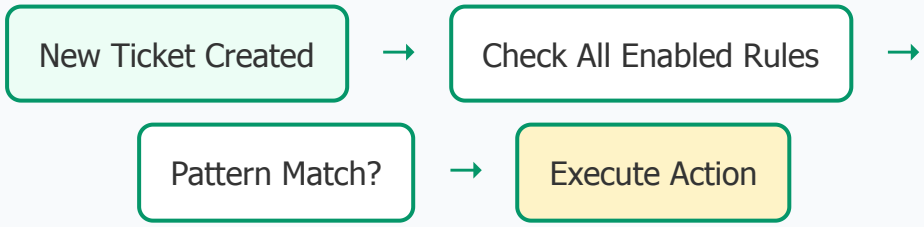
Purpose: This guide explains ServiFlow's Ticket Rules system—a powerful automation engine that processes incoming tickets based on text patterns, automatically performing actions like assignment, deletion, priority changes, and customer routing. Rules eliminate repetitive manual work and ensure consistent ticket handling.

What Are Ticket Rules?

Ticket Rules are "if-this-then-that" automations that run whenever a new ticket is created. Each rule has two parts:

1. **Search Criteria:** A text pattern to look for in the ticket title, description, or both
2. **Action:** What to do when a match is found (delete, assign, forward, etc.)



Business Benefit:

Rules run automatically in the background. Staff don't need to remember which tickets need special handling—the system handles it consistently every time.

Rule Components

Search Settings

Setting	Options	Description
Search In	Title, Body, Both	Where to look for the pattern
Search Text	Any text	The pattern to match (partial match, not exact)
Case Sensitive	Yes / No	Whether "NAGIOS" matches "nagios"

Tip:

Search uses partial matching. The pattern "backup" will match "MySQL Backup Failed", "Backup complete", and "backup-server-01".

Available Actions

Delete Ticket

Permanently removes matching tickets. Use for known spam, test messages, or alerts you don't want to track.

```
action_type: "delete"
action_params: {}
```

Assign to Expert

Automatically assigns the ticket to a specific technician and sets status to "In Progress".

```
action_type: "assign_to_expert"
action_params: { "expert_id": 40, "expert_name": "John Smith" }
```

Create for Customer

Creates a copy of the ticket assigned to a different customer. Original is prefixed with "[Forwarded]". Useful for routing monitoring alerts to the correct client.

```
action_type: "create_for_customer"
action_params: { "customer_id": 41 }
```

Set Priority

Changes the ticket priority level (low, medium, high, critical).

```
action_type: "set_priority"
action_params: { "priority": "critical" }
```

Set Status

Changes the ticket status (Open, In Progress, Pending, Resolved, Closed).

```
action_type: "set_status"
action_params: { "status": "Resolved" }
```

Add Tag

Adds a tag/label to the ticket for categorisation and filtering.

```
action_type: "add_tag"
action_params: { "tag": "monitoring" }
```

Add to Monitoring Sources

Marks the ticket as originating from a monitoring system. Affects how it appears in dashboards and reports.

```
action_type: "add_to_monitoring"
action_params: {}
```

Real-World Examples

Example 1: Delete Nagios Test Alerts

Example:

Problem: Nagios sends test/heartbeat emails that create unnecessary tickets.

Rule Configuration:

- Rule Name: "Delete Nagios Tests"
- Search In: Both
- Search Text: "Nagios"
- Action: Delete

Result: All tickets containing "Nagios" are automatically deleted before staff see them.

Example 2: Route P1 Security Issues to Specialist

Example:

Problem: Security-related tickets prefixed with "P1" need immediate attention from a security specialist.

Rule Configuration:

- Rule Name: "P1 Security Issue"
- Search In: Title
- Search Text: "P1 "
- Action: Assign to Expert
- Expert: Tharuni Reddy (ID: 40)

Result: Tickets with "P1 " in the title are auto-assigned to Tharuni and moved to "In Progress".

Example 3: Route MySQL Backups to Client

Example:

Problem: MySQL backup reports from a monitoring system need to be tracked under a specific customer account.

Rule Configuration:

- Rule Name: "MySQL Backup from Bleckmann"
- Search In: Both
- Search Text: "MySQL Backup "
- Action: Create for Customer
- Customer ID: 41

Result: A customer-facing ticket is created for tracking and billing purposes.

Example 4: Clean Up Forwarded Duplicates

Example:

Problem: The "Create for Customer" action creates copies prefixed with "[Forwarded]". These duplicates clutter the queue.

Rule Configuration:

- Rule Name: "[Forwarded] remove these"
- Search In: Both
- Search Text: "[Forwarded]"
- Action: Delete

Result: Forwarded copies are deleted, leaving only the properly-routed original.

Rule Execution

When Rules Run

- ✓ Automatically when a new ticket is created (via email, API, or manual entry)
- ✓ Manually via "Run Rule" button in the admin interface
- ✓ In batch mode for processing historical tickets

Execution Order

All enabled rules are checked against each new ticket. If multiple rules match, they all execute in sequence. This allows chaining actions (e.g., tag a ticket AND assign it).

> **Important:**
>
> Be careful with Delete rules—if a ticket matches a Delete rule, it will be removed even if other rules also matched. Consider the order of your rules carefully.

Batch Processing

When running rules against many tickets, ServiFlow processes them in batches to avoid overloading the system:

- **Batch Size:** 5 tickets at a time (configurable up to 10)
- **Delay Between Batches:** 2-3 seconds
- **Circuit Breaker:** Automatically stops if 5+ consecutive connection errors occur

Monitoring & Audit Trail

Execution History

Every rule execution is logged in the `ticket_rule_executions` table, recording:

- Which rule fired
- Which ticket was affected

- What action was taken
- Success or failure status
- Timestamp

Rule Statistics

Each rule tracks:

Metric	Description
Times Triggered	Total number of times the rule has executed
Last Triggered	Date/time of most recent execution
Enabled/Disabled	Current status

Notifications

When batch processing completes, a notification is created showing:

- Number of tickets processed successfully
- Number of failures (if any)
- Total duration
- Any error messages

Best Practices

Do:

- ✓ Test rules using "Test Rule" before enabling
- ✓ Use specific search patterns to avoid false matches
- ✓ Document why each rule exists in the description
- ✓ Review execution history regularly

Don't:

- Create overly broad Delete rules
- Use case-sensitive unless necessary
- Create conflicting rules
- Run batch jobs during peak hours
- Forget to monitor rule statistics

✓ Disable rules rather than deleting them

Database Tables

Table	Purpose
`ticket_processing_rules`	Rule definitions (name, search criteria, action type, parameters)
`ticket_rule_executions`	Audit log of every rule execution with results

Current Production Rules

As of January 2026, these rules are configured:

Rule Name	Search Text	Action	Status
MySQL Backup from Bleckmann	"MySQL Backup "	Create for Customer #41	Enabled
P1 Security Issue	"P1 " (title only)	Assign to Tharuni Reddy	Enabled
[Forwarded] remove these	"[Forwarded]"	Delete	Enabled
Cert Renewed	"Cert was renewed;"	Create for Customer #41	Enabled
Nagios	"Nagios"	Delete	Enabled
Nldtc1bopfep01	"Nldtc1bopfep01"	Add to Monitoring	Enabled
Bleckmann	"Bleckmann"	Create for Customer #10	Disabled

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For technical support, contact your system administrator.