

# Setup Rules

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## Click on Settings

The screenshot shows the ONE TO ONE PLUS dashboard interface. The left sidebar contains a menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, and Settings. The Settings item is highlighted with a red box. The main dashboard area displays several charts and reports under the 'Tickets' tab, including 'Open Tickets by Assigned Technician', 'Open Tickets by Site', 'Open Tickets by Type', 'Tickets by Status', 'Tickets by Closure Type', 'Outstanding Tickets by Time', and 'Daily Ticket Status'.

## Click on System

The screenshot shows the ONE TO ONE PLUS dashboard interface. The left sidebar contains a menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, Settings, System, Assets, Users, Sites, and Parts. The System item is highlighted with a red box. The main dashboard area displays several charts and reports under the 'Tickets' tab, including 'Open Tickets by Assigned Technician', 'Open Tickets by Site', 'Open Tickets by Type', 'Tickets by Status', 'Tickets by Closure Type', 'Outstanding Tickets by Time', and 'Daily Ticket Status'.

# Click on Rules

The screenshot shows the ONE TO ONE PLUS interface. The left sidebar contains a navigation menu with items like Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Imports, Reports, and Settings. The main content area is titled 'System Properties' and contains several configuration cards: System Settings, User Logins, User Roles, User Groups, Email Groups, School Years, SMTP Configurations, Rules (highlighted with a red box), and Custom Emails. The 'Rules' card is described as 'System events and rules for tasks, email, etc.'

# Click Add New to add a new rule

The screenshot shows the ONE TO ONE PLUS interface for managing rules. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Manage Rule(s)' and features a '+ Add New' button (highlighted with a red box) in the top right corner. Below the button is a table with the following data:

Rule Name	Description	Priority	Actions
Ticket Type Default Technician Rule	This rule sets the technician on a ticket based on the default technician field on the ticket type.	99	
Site Default Technician Rule	This rule sets the technician on a ticket based on the default technician field for each individual site.	100	
Route tickets for DSD to queue	Automatically route tickets from site DSD to the DSD Queue	3	







# Click on Edit to edit an existing rule

Home > System Properties > Rules

Search

Demo School District One to One Plus

+ Add New

Rule Name	Description	Priority	Actions
Ticket Type Default Technician Rule	This rule sets the technician on a ticket based on the default technician field on the ticket type.	99	 
Site Default Technician Rule	This rule sets the technician on a ticket based on the default technician field for each individual site.	100	 
Route tickets for DSD to queue	Automatically route tickets from site DSD to the DSD Queue	3	 

# Enter a name for the rule

Home > System Properties > Rules > Edit Rule

Search

Demo School District One to One Plus

## Edit Rule

**Rule Name \***

**Description**

**Event \***

**Priority \***

**Conditions**

- and -

**OR** **AND** **FIELD**

**Field \***

**Operator \***

**Site(s) \***

# Add a description of the rule

The screenshot shows the 'Edit Rule' interface in the One to One Plus system. The page title is 'Edit Rule' and the breadcrumb is 'Home > System Properties > Rules > Edit Rule'. The user is logged in as 'Demo School District'.

The rule configuration is as follows:

- Rule Name:** Route tickets for DSD to queue
- Description:** Automatically route tickets from site DSD to the DSD Queue (highlighted with an orange box)
- Event:** Ticket is Created
- Priority:** 3

The 'Conditions' section is currently empty, showing a '- and -' separator and a 'Delete' button.

# Select an event from the list that will trigger the rule

The screenshot shows the 'Edit Rule' interface in the One to One Plus system. The page title is 'Edit Rule' and the breadcrumb is 'Home > System Properties > Rules > Edit Rule'. The user is logged in as 'Demo School District'.

The rule configuration is as follows:

- Rule Name:** Route tickets for DSD to queue
- Description:** Automatically route tickets from site DSD to the DSD Queue
- Event:** Ticket is Created (highlighted with an orange box)
- Priority:** 3

The 'Conditions' section is currently empty, showing a '- and -' separator and a 'Delete' button.

# Add a priority for the rule as they will process in priority order (#1 being the highest priority)

The screenshot shows the 'Edit Rule' page in the One to One Plus system. The page title is 'Edit Rule' and the breadcrumb is 'Home > System Properties > Rules > Edit Rule'. The page contains several form fields: 'Rule Name' (Route tickets for DSD to queue), 'Description' (Automatically route tickets from site DSD to the DSD Queue), 'Event' (Ticket is Created), and 'Priority' (3). The 'Priority' field is highlighted with a red border. Below the form fields is a 'Conditions' section with a drag-and-drop interface. On the left, there are three buttons: 'OR', 'AND', and 'FIELD'. The 'FIELD' button is highlighted with a red border. On the right, there is a 'Conditions' area with a '- and -' separator and a list of conditions. The first condition is 'Site' (One Of) with a value of 'DSD'. A 'Delete' button is located at the bottom right of the conditions area.

# Drag a field into the Conditions area

The screenshot shows the 'Edit Rule' page in the One to One Plus system. The page title is 'Edit Rule' and the breadcrumb is 'Home > System Properties > Rules > Edit Rule'. The page contains several form fields: 'Rule Name' (Route tickets for DSD to queue), 'Description' (Automatically route tickets from site DSD to the DSD Queue), 'Event' (Ticket is Created), and 'Priority' (3). The 'Priority' field is highlighted with a red border. Below the form fields is a 'Conditions' section with a drag-and-drop interface. On the left, there are three buttons: 'OR', 'AND', and 'FIELD'. The 'FIELD' button is highlighted with a red border. On the right, there is a 'Conditions' area with a '- and -' separator and a list of conditions. The first condition is 'Site' (One Of) with a value of 'DSD'. A 'Delete' button is located at the bottom right of the conditions area.

# Select a field from the list

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Demo School District One to One Plus

### Edit Rule

Rule Name \* Route tickets for DSD to queue

Description Automatically route tickets from site DSD to the DSD Queue

Event \* Ticket is Created x v

Priority \* 3

#### Conditions

OR AND FIELD

- and -

Field \* Site x v

Operator \* One Of x v

Site(s) \* X DSD

Delete

# Choose whether the field is "one of" or "not one of" from the list

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Demo School District One to One Plus

### Edit Rule

Rule Name \* Route tickets for DSD to queue

Description Automatically route tickets from site DSD to the DSD Queue

Event \* Ticket is Created x v

Priority \* 3

#### Conditions

OR AND FIELD

- and -

Field \* Site x v

Operator \* One Of x v

Site(s) \* X DSD

Delete

Select the options that you wish to include in the condition.  
You can select multiple options.

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Demo School District One to One Plus

### Edit Rule

Rule Name \* Route tickets for DSD to queue

Description Automatically route tickets from site DSD to the DSD Queue

Event \* Ticket is Created

Priority \* 3

#### Conditions

OR AND FIELD

- and -

Field \* Site

Operator \* One Of

Site(s) \* DSD

Delete

You can add multiple conditions.

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Demo School District One to One Plus

### Edit Rule

Rule Name \* Route tickets for DSD to queue

Description Automatically route tickets from site DSD to the DSD Queue

Event \* Ticket is Created

Priority \* 3

#### Conditions

OR AND FIELD

- and -

Field \* Site

Operator \* One Of

Site(s) \* DSD

Delete

# You can select whether you want multiple conditions to be meet an "and" conditions as well as "or" conditions

The screenshot shows the 'Edit Rule' configuration page. The 'Conditions' section is highlighted with an orange box. It displays a dropdown menu with 'OR' and 'AND' options. Below this, the 'FIELD' dropdown is set to 'Site', the 'Operator' is 'One Of', and the 'Site(s)' dropdown is set to 'DSD'. A 'Delete' button is visible at the bottom right of the conditions section.

# Drag the action button into the Action area

The screenshot shows the 'Edit Rule' configuration page. The 'Actions' section is highlighted with an orange box. It displays an 'ACTION' dropdown menu with the option 'Assign Ticket to Queue'. A 'Delete' button is visible at the bottom right of the actions section.



# Select an Action from the list

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Event \* Ticket is Created

Priority \* 3

Conditions

OR AND FIELD

Field \* Site

Operator \* One Of

Site(s) \* X DSD

Actions

Action \* Assign Ticket to Queue

# Select the options that meet the desired action from the list

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Event \* Ticket is Created

Priority \* 3

Conditions

OR AND FIELD

Field \* Site

Operator \* One Of

Site(s) \* X DSD

Actions

Action \* Assign Ticket to Queue

Ticket Queue \* DSD Site Queue

# You can add multiple actions to a rule

The screenshot shows the ONE TO ONE PLUS interface for editing a rule. The breadcrumb trail is "Home > System Properties > Rules > Edit Rule". The page is titled "Conditions" and "Actions".

**Conditions:** A panel on the left shows logical operators: OR, AND, and FIELD. The main area shows a condition: "Field" is "Site", "Operator" is "One Of", and "Site(s)" is "DSD". A "Delete" button is visible.

**Actions:** A panel on the left shows the ACTION operator. The main area shows two actions: "Assign Ticket to Queue" and "Ticket Queue" is "DSD Site Queue". A "Delete" button is visible.

# Drag a notification box into the Notifications area

The screenshot shows the ONE TO ONE PLUS interface for editing a rule, similar to the previous one. The breadcrumb trail is "Home > System Properties > Rules > Edit Rule". The page is titled "Conditions", "Actions", and "Notifications".

**Conditions:** A panel on the left shows logical operators: AND, OR, and FIELD. The main area shows a condition: "Field" is "Site", "Operator" is "One Of", and "Site(s)" is "DSD". A "Delete" button is visible.

**Actions:** A panel on the left shows the ACTION operator. The main area shows two actions: "Assign Ticket to Queue" and "Ticket Queue" is "DSD Site Queue". A "Delete" button is visible.

**Notifications:** A panel on the left shows the NOTIFICATION operator. The main area shows one action: "Send Update Email to Queue Technicians". A "Delete" button is visible.

# Select the type of notification and the users to receive the notification from the list.

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

AND

FIELD

Field \* Site

Operator \* One Of

Site(s) \* DSD

Delete

Actions

ACTION

Action \* Assign Ticket to Queue

Ticket Queue \* DSD Site Queue

Delete

Notifications

NOTIFICATION

Action \* Send Update Email to Queue Technicians

# Click Save

ONE TO ONE PLUS

Home > System Properties > Rules > Edit Rule

Operator \* One Of

Site(s) \* DSD

Delete

Actions

ACTION

Action \* Assign Ticket to Queue

Ticket Queue \* DSD Site Queue

Delete

Notifications

NOTIFICATION

Action \* Send Update Email to Queue Technicians

Delete

Save