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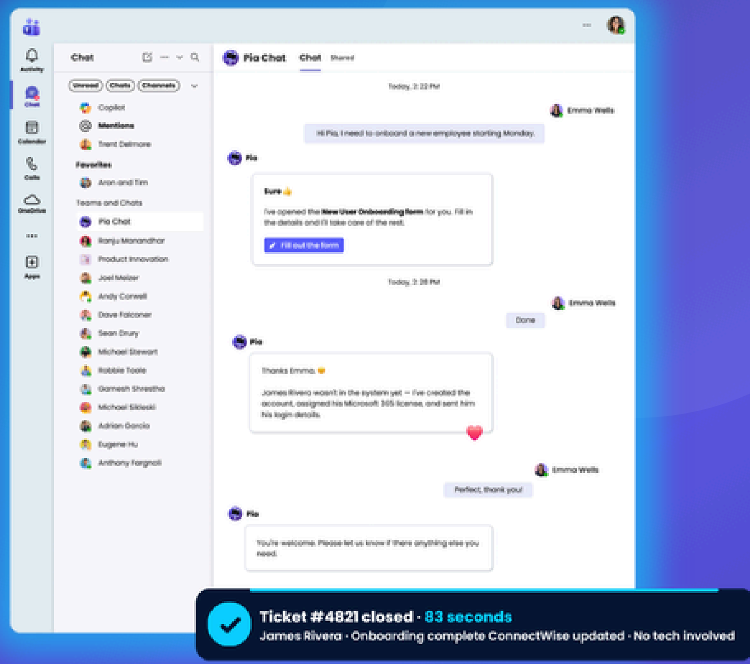
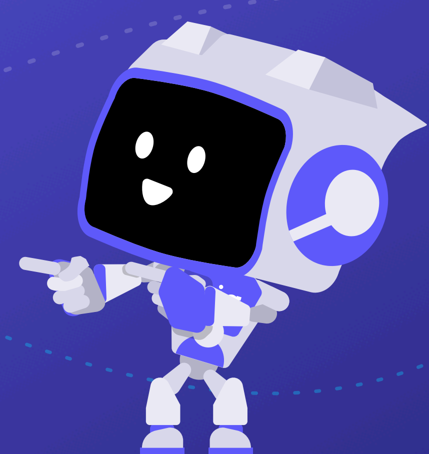


PIA | GUIDE

Automated Actions in Pia Chat

What they are, the automations worth building, and how to get them right.



BEST PRACTICES FOR AUTOMATED ACTIONS

What Automated Actions are

The building block that turns Pia Chat conversations into resolved requests.

An Automated Action is two things joined together: an intent you describe in a prompt, and the actions Pia takes when that intent matches. Your clients can trigger them simply by messaging Pia Chat in Microsoft Teams.

What you can solve with them

Each one runs the same path: a client messages, the intent matches, your actions fire.

1 Surface your documentation

CLIENT SAYS

“The wi-fi isn’t working”.

WHAT PIA DOES Serves the documented fix from your client-facing knowledge base straight into the chat, so the client can work through it before anyone picks up a ticket. Same for the KB article for MFA on a new phone.

ACTION RECIPE Send Link/Message with the article link. Add Log a Ticket and Set Value on Ticket if you want to measure how often it’s asked for.

PARTNER VALUE **Documentation you’ve already written starts deflecting tickets, and you can see which articles earn their keep.**

2 Answer the questions you keep answering

CLIENT SAYS

“What time does your help desk close?”

WHAT PIA DOES Replies with the fixed answer your service desk types five times a week. Office hours, where the modem lives, how to power cycle it.

ACTION RECIPE Send Link/Message on its own. Add Log a Ticket and Set Value on Ticket to report on how often it comes up.

PARTNER VALUE **Questions with one right answer stop reaching a technician at all**

3 VIP and ticket escalation

CLIENT SAYS

"This is urgent. Our CEO can't access email."

WHAT PIA DOES Captures the business impact, then applies your escalation policy: priority, status, board, and a named owner in one move. Build separate P1 and P2 actions to fire on the severity of the wording.

ACTION RECIPE Log a Ticket, then Set Value on Ticket for Priority, Status, Board, and Assignee. For an existing ticket, swap Log a Ticket for Add a Note.

PARTNER VALUE **Your escalation standard runs the same way every time, protecting your tickets per technician.**

4 Make tickets arrive ready to work

CLIENT SAYS

"I can't connect to the VPN from home."

WHAT PIA DOES Stamps anything mentioning VPN or Citrix as Incident, Remote Access, VPN on the way in and drops it on the board that handles it. Same for lockouts and drive mapping.

ACTION RECIPE Log a Ticket, then Set Value on Ticket for Ticket Classification, Board, and Team.

PARTNER VALUE **Nobody categorizes it later, and your reporting is right from first touch.**

5 Act on tickets that already exist

CLIENT SAYS

"Cancel the request I logged yesterday, we sorted it ourselves."

WHAT PIA DOES Adds the note to the open ticket and moves the status, with no second ticket created. Same for telling a client their ticket has been marked complete.

ACTION RECIPE Add a Note plus Set Value on Ticket for Status. Add a Note and Log a Ticket can't go in the same action.

PARTNER VALUE **Duplicates stop inflating your queue and your resolution numbers.**

6 Set expectations after hours

CLIENT SAYS

"Is anyone there? It's 9pm."

WHAT PIA DOES Replies with your after-hours process, the emergency line, and the note that after-hours rates may apply.

ACTION RECIPE Send Link/Message. Add Log a Ticket and Set Value on Ticket for Board if it still needs to reach someone.

PARTNER VALUE **After-hours contact follows your agreement every time.**

7 Actually fix the thing

CLIENT SAYS

"Nothing's printing from my machine."

WHAT PIA DOES Runs your Automation, restarts the print spooler, and returns the result in the conversation. Same for handing a user back their calendar permissions.

ACTION RECIPE Start Teams Automation to resolve it in chat. If you want it tracked, add Log a Ticket, then Set Value on Ticket to route and close it.

PARTNER VALUE **The request is closed before it reaches a queue.**

> **How it works:** *An Automated Action decides when to fire and what to set on the ticket. An Automation does the work. Add Start Teams Automation as one of the actions and, when the intent matches, Pia runs that Automation and returns the result in the chat. The Automation needs the Teams Chat condition enabled on its package.*

What you don't need to build Pia Chat already checks open tickets, serves available SmartForms, and runs your Automated Actions before it triages and logs a ticket. If a request maps to a SmartForm you've published, you don't need an Automated Action for it. Onboarding, offboarding and password resets usually fall into this bucket.

EXAMPLES

If you've got one Automated Action or none, build these three first.

01 **Your most repeated answer**
Whatever your service desk types out five times a week.

02 **Your escalation path**
VIP or P1, chained properly: log the ticket, set the status, lift the priority, assign it.

03 **“Where’s my ticket up to”**
Answer it with a portal link instead of it becoming a new ticket.

That's an afternoon and it's where the return is.

AFTER THAT, THE ONES WORTH BUILDING NEXT

- Internet down or slow, with site-specific first steps before a ticket is raised
- New hardware requests routed to your procurement or sales board
- VPN and remote access, stamped with the right classification
- Slow or crashing machine, qualifying questions up front
- Printer and scanning faults, deflected or routed
- Suspicious or phishing email, do-not-click reply first and a security board
- Speak to a human, so a ticket gets logged straight away
- A catch-all, so anything that doesn’t match still gets captured
- Email setup on mobile, steps served in the chat
- Software user creation (e.g. Adobe), routed to whoever handles licensing
- Software and application issues, app named and basics captured on the way in

Best practices

Any of the automations above is quick to set up. Whether it fires on the right messages and does the whole job comes down to how you build it.

Six things that separate a good build from a broken one

1

Write the prompt for matching, not for documenting

The prompt is what Pia matches against, so boards and priorities written into it do nothing. Include what the request looks like, what it isn't, and how people actually type it.

2

Rewrite the template before you use it

Change only the label and the action keeps matching whatever the template was written for, not what you called it. The same applies when you duplicate an action you've already built.

3

One action is rarely the whole job

Every field you set on the way in is more value. Click the plus and add more. Log a Ticket and Add a Note are mutually exclusive: one for new requests, one for something already open.

4

Set your Ticketing Defaults first

Workflow sets Board, Source and Status on every ticket Pia Chat creates, so Set Value on Ticket is only for overrides. SmartForms tickets keep their own, even in Teams.

5

Use the preview before you save

Type like a client and see what Pia sends back. Test the obvious phrasing, the sloppy phrasing, then something close that shouldn't fire. That last one catches the most problems.

6

Build globally, override per client

A client with no custom workflow inherits everything global. Build your standard set once and go client-specific only where there's a genuine site difference, like where a modem lives.

Questions or something not behaving? Talk to your PSM or drop us a line at partner-support@pia.ai