

How to Setup Filters for NextTicket Manager

Filters are used to narrow down the tickets that you want your technicians to work on. These are configured by defining conditions using the available fields in your PSA.

What's in this article:

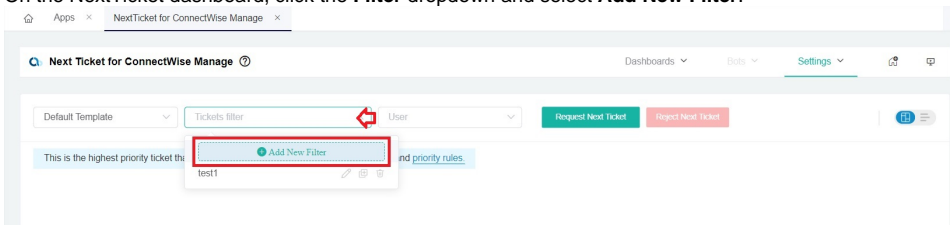
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Only admin users can create and modify filters.

How to Create a Filter



You can create a filter with the following steps:

1. Open NextTicket on the MSPbots app. Navigate to **Apps** and select **NextTicket** from the apps list.
2. On the NextTicket dashboard, click the **Filter** dropdown and select **Add New Filter**.



3. Set up conditions on the Filter Settings window that appears.

A screenshot of the 'Filter Settings' window. It has a title bar with a close button. Below the title, there's a 'Filter Name' field containing 'Test Filter'. The main area is a table-like structure with three rows of conditions. The first row has 'Service Board' selected from a dropdown, 'IN' as the operator, and 'Proactive Service...' as the value. The second row has 'Status' selected, 'Not IN' as the operator, and 'Proactive Service...' as the value. The third row has 'Closed Flag' selected, 'Equal' as the operator, and 'False' as the value. At the bottom, there are 'Cancel', 'Preview', and 'Save' buttons.

- a. Input a **Filter Name**.
- b. Click the  icon to add a condition and select the needed PSA field(s) and operator(s) to define the ticket pool. Service Boards /Queue, Ticket Status, and Closed Flag are commonly used filters. You can also use the  icon to add a group. You must have a service board (Or Queue) field for the NextTicket app to work.
- c. When done adding conditions, click the **Preview** button to test if the tickets are the ones that you want to show. *Select a user on the main dashboard before using the Preview button to ensure that the function will work successfully.* In the "Test Result" pop-up window, it can capture up to 250 items. We have set a limit to capture a maximum of 250 data items. The reason for this limit is that sometimes the data returned by the API interface is too large, which can cause errors in the interface.
 - When capturing 250 ticket items, the number of filtered tickets can be exactly 250 items or more than 250 items.
 - When there are fewer than 250 items, the number of filtered tickets will be displayed accordingly.

If you want to avoid having 250 items, please go back to the "Filter Settings" page to adjust the filter and preview again until the ticker items are less than 250 items.

PDF Export CSV Export Columns ▾

Ticket ID	Ticket Name	Pts	Company Name	Resource	User Assigned	User Assigned Pts	Watch List Pts
#03208	fdgfg	8000	Test1	Test1	Test1	0	0
#03343	testt our servers are down!!!	8000	Test2	Test2	Test2	0	0
#03392	test update	8000	My Company	Test1	Test1	0	0
#03220	Test Attendance 222	4000	Test1	Test1	Test1	0	0
#03339	please check Cannot Log In Account	4000	Test1	Test1	Test1	0	0
#03150	Troubleshooting	3100	Test1	Test1	Test1	0	1000
#03154	Troubleshooting	3100	Test1	Test1	Test1	0	1000
#03158	Troubleshooting	3100	Test1	Test1	Test1	0	1000
#03162	Troubleshooting	3100	Test1	Test1	Test1	0	1000
#03165	Troubleshooting	3100	Test1	Test1	Test1	0	1000
#03174	Weekly meeting	3100	Test1	Test1	Test1	0	1000


1 of 3 pages 250 items

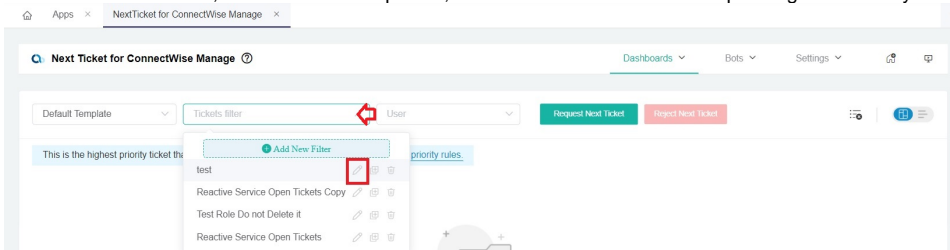
d. Once satisfied with the filter settings, click **Save**.

If a PSA field is not available from the dropdown list, please reach out to our Support Team at support@mspbots.ai.

How to Edit a Filter

You can edit an existing filter with the following steps:

1. Navigate to **Apps** on the MSPbots menu and select **NextTicket**.
2. On the main dashboard, click the **Filter** dropdown, then click the  icon corresponding to the filter you want to edit.




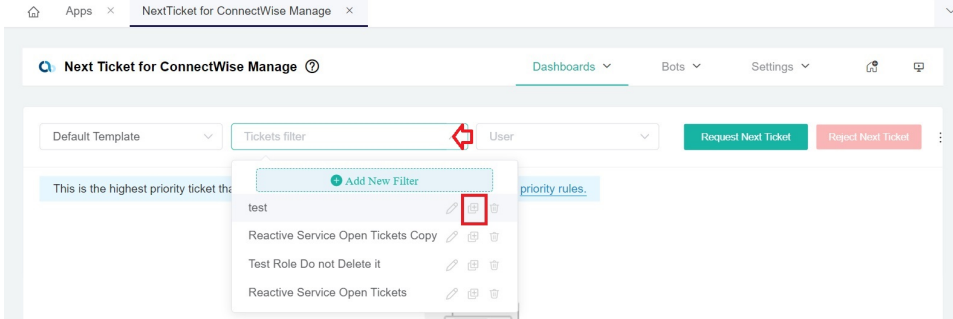
3. Click **Save** when done editing.

How to Copy a Filter

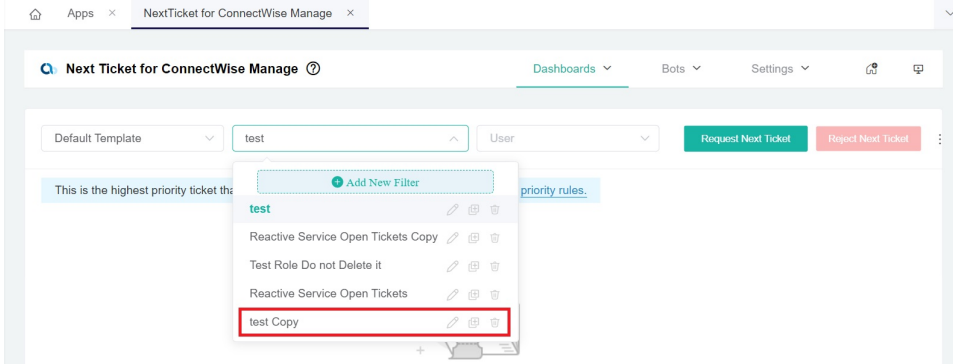
You can copy or clone an existing filter with the following steps:

1. Navigate to **Apps** on the MSPbots menu and select **NextTicket**.

2. On the main dashboard, click on the **Filter** dropdown, then click the  icon corresponding to the filter you want to copy.




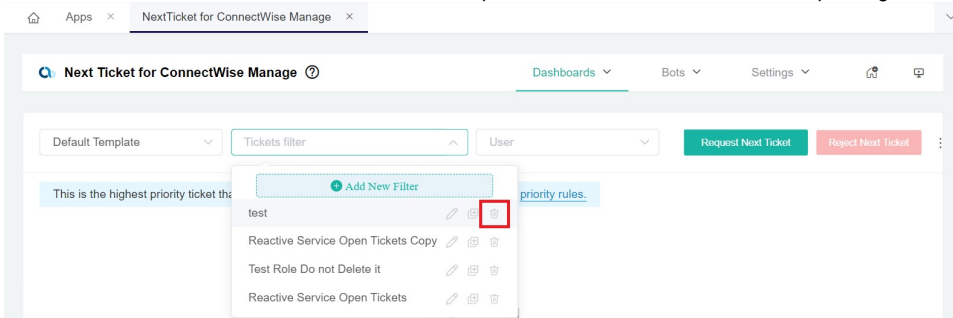
A copy of the selected filter will be added to the dropdown list.



How to Delete a Filter

You can delete a filter with the following steps:

1. Navigate to **Apps** on the MSPbots menu and select **NextTicket**.
2. On the main dashboard, click on the **Tickets filter** dropdown, then click the  icon corresponding to the filter you want to delete.



3. Click **OK** when asked if you want to delete. The screen will refresh, and the filter will be removed from the dropdown list.