# How to Assign Default Filters and Rule Templates to Technicians

Admins can assign filters and rules to technicians. This article shows how to do the following:

A. Assign a NextTicket Filter
How to apply a single filter or assign a new one to a technician How to apply a filter to a batch of technicians What happens when multiple filters are assigned to a technician?
B. Assign a Next Ticket Template How to apply a single template or assign a new one to a technician How to apply a template to a batch of technicians

## A. Assign a NextTicket Filter

Admins can assign single or multiple filters to technicians. This is done in the User Filter Rule settings for your PSA.

#### How to apply a single filter or assign a new one to a technician

1. Navigate to Apps on the MSPbots app and open NextTicket for your PSA



This action will open the User Filter Rule tab for your PSA.

3. On the User Filter Rule tab, go through the User Name column and find the technician's name.

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- 4. Next, go to the Default Next Ticket Filter column and click the dropdown field corresponding to the technician's name.
- 5. Select the filter you want to assign then click Apply.

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## How to apply a filter to a batch of technicians

You can use the **Batch Apply Filter** button to apply the same filter to one or more technicians in a batch.

- 1. Perform Steps 1 and 2 above.
- On the User Filter Rule tab, tick the boxes corresponding to the technicians that will work on the same filter. To select all technicians, tick the box beside the User Name column label.

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3.	Click the Batch	Apply Filter	outton, select	a filter from th	he dropdown lis	t, and click	Apply.
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### What happens when multiple filters are assigned to a technician?

You can assign multiple filters to prioritize a technician's tickets. When this happens, ticketing will do a round-robin prioritization by default. For example, when a technician types **nt**, NextTicket Manager will use Filter A to identify the next priority ticket. On the second time the **nt** command is typed, Filter B will be used, then Filter C next, and so on until all the filters are applied.

Multiple filters only work on filters and not on rule templates.

## B. Assign a Next Ticket Template

Admins can only assign one NextTicket Template per Technician.

## How to apply a single template or assign a new one to a technician

- 1. Follow Steps 1 and 2 in the previous section.
- 2. On the User Filter Rule tab, go through the User Name column and find the technician's name.

3. Next, go to the Default Next Ticket Template column and click the dropdown field corresponding to the technician's name.

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4. Select the template you want to assign then click Apply. This will apply the selected default template to the selected technician.

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## How to apply a template to a batch of technicians

You can do a batch application of a template for a group of technicians that will work on the same NextTicket Template.

- **1.** Follow Steps 1 and 2 in the previous section.
- 2. On the User Filter Rule tab, tick the boxes corresponding to the technicians that will work on the same template. To select all technicians, tick the box beside the User Name column label.

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3. Click the Batch Apply Template button, select a template from the dropdown list, and click Apply.

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This action will apply the selected default template to the selected technicians.

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