

# 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:

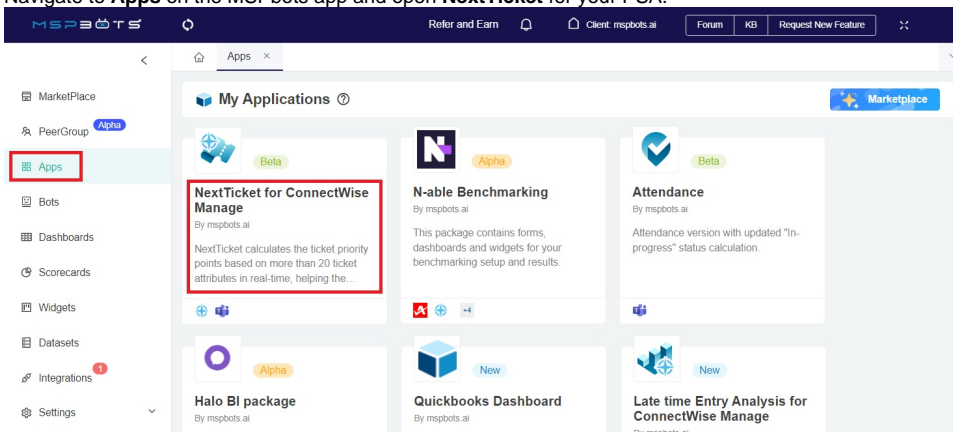
- A. Assign a NextTicket Filter
  - [How to apply a single filter or assign a new one to a technician](#)
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- B. Assign a Next Ticket Template
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  - [How to apply a template to a batch of technicians](#)

## A. Assign a NextTicket Filter

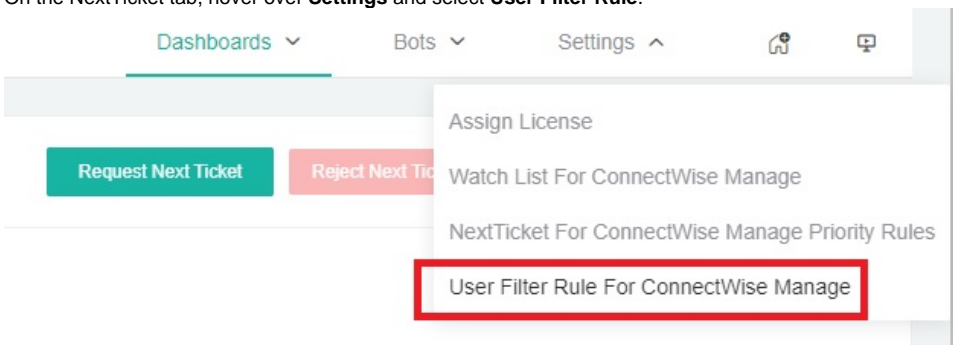
Admins can assign single or multiple filters to technicians. This is done in the User Filter Rule settings for your PSA.

### 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.

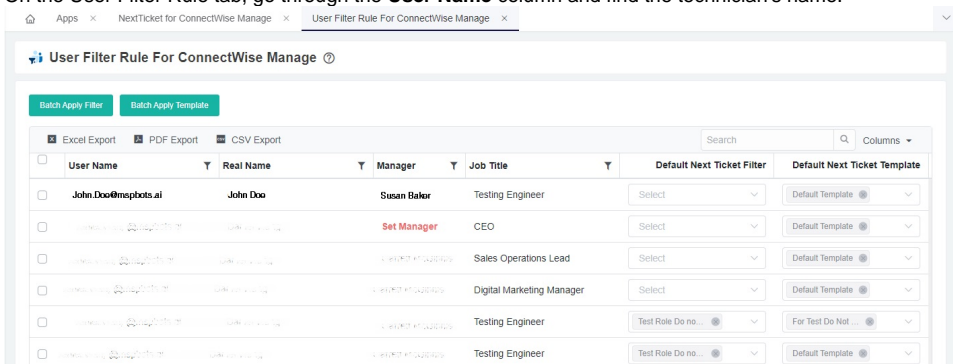


2. On the NextTicket tab, hover over **Settings** and select **User Filter Rule**.



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.



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

Job Title	Default Next Ticket Filter	Default Next Ticket Template
Testing Engineer	Select	Default Template
CEO	Reactive Service Open Tickets Copy	Default Template
Sales Operations Lead	Reactive Service Open Tickets ✓	Default Template
Digital Marketing Manager		Default Template
Testing Engineer		Test Do Not ...
Testing Engineer	Test Role Do no...	Default Template

This will assign a default filter to the selected technician.

User Name	Real Name	Manager	Job Title	Default Next Ticket Filter	Default Next Ticket Template
John.Doo@mspbots.ai	John Doo	Susan Baker	Testing Engineer	Reactive Service...	Default Template
		Set Manager	CEO	Select	Default Template
			Sales Operations Lead	Select	Default Template
			Digital Marketing Manager	Select	Default Template
			Testing Engineer	Test Role Do no...	For Test Do Not ...
			Testing Engineer	Test Role Do no...	Default Template

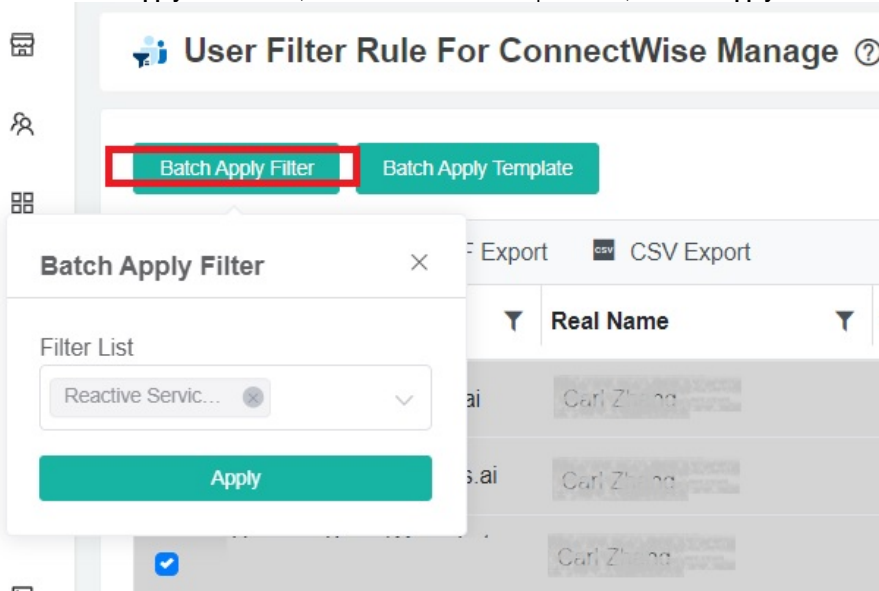
## How to apply a filter to a batch of technicians

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

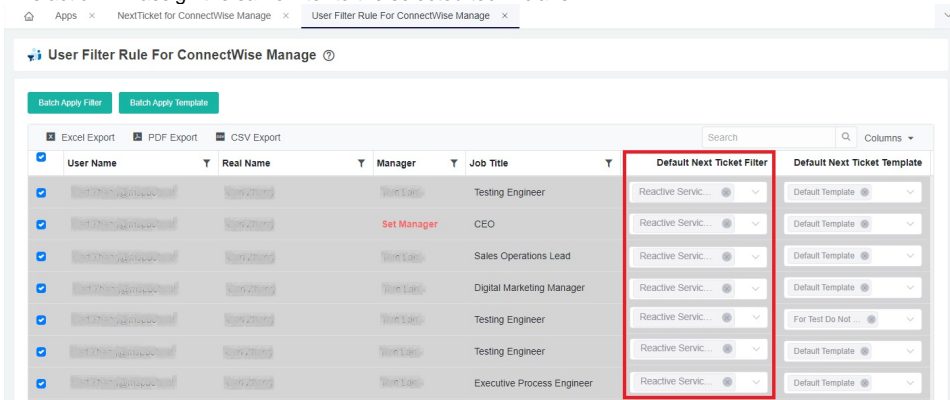
- Perform [Steps 1 and 2](#) above.
- On the User Filter Rule tab, tick the boxes corresponding to the technicians that will work on the same filter. To select all technicians, tick the box beside the **User Name** column label.

User Name	Real Name	Manager	Job Title	Default Next Ticket Filter	Default Next Ticket Template
John.Doo@mspbots.ai	John Doo	Susan Baker	Testing Engineer	Select	Reactive Template
		Set Manager	CEO	Select	Reactive Template
			Sales Operations Lead	Select	For Test Do Not ...
			Digital Marketing Manager	Select	Reactive Template
			Testing Engineer	Test Role Do no...	For Test Do Not ...
			Testing Engineer	Test Role Do no...	For Test Do Not ...
			Executive Process Engineer	Select	Reactive Template

3. Click the **Batch Apply Filter** button, select a filter from the dropdown list, and click **Apply**.



This action will assign the same filter to the selected technicians.



## 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.

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

The screenshot shows the 'User Filter Rule For ConnectWise Manage' interface. At the top, there are tabs for 'Apps', 'NextTicket for ConnectWise Manage', and 'User Filter Rule For ConnectWise Manage'. Below the tabs, there are buttons for 'Batch Apply Filter' and 'Batch Apply Template'. A table lists technicians with columns: 'User Name', 'Real Name', 'Manager', 'Job Title', 'Default Next Ticket Filter', and 'Default Next Ticket Template'. The first technician, John Doo, has 'Default Template' selected in the 'Default Next Ticket Template' column. A dropdown menu is open for this cell, showing 'Default Template' as the selected option.

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

The screenshot shows the 'User Filter Rule For ConnectWise Manage' interface. At the top, there are tabs for 'Apps', 'NextTicket for ConnectWise Manage', and 'User Filter Rule For ConnectWise Manage'. Below the tabs, there are buttons for 'Batch Apply Filter' and 'Batch Apply Template'. A table lists technicians with columns: 'User Name', 'Real Name', 'Manager', 'Job Title', 'Default Next Ticket Filter', and 'Default Next Ticket Template'. The first technician, John Doo, has 'Default Template' selected in the 'Default Next Ticket Template' column. A dropdown menu is open for this cell, showing 'Default Template' as the selected option.

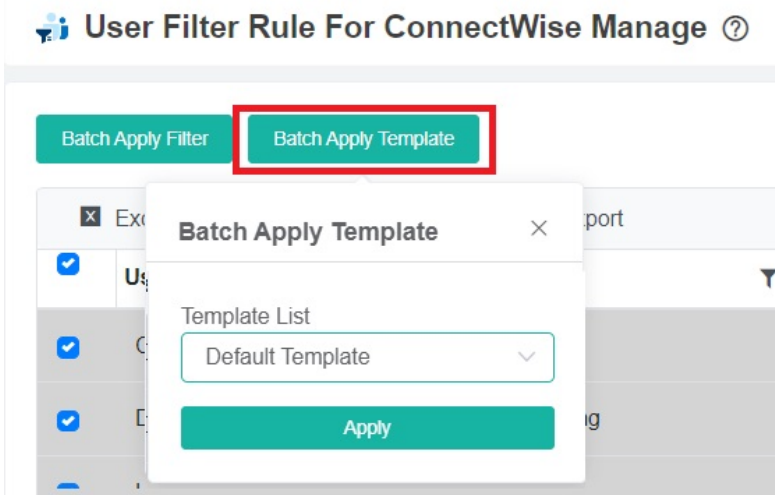
## How to apply a template to a batch of technicians

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

- Follow [Steps 1 and 2](#) in the previous section.
- 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.

The screenshot shows the 'User Filter Rule For ConnectWise Manage' interface. At the top, there are tabs for 'Apps', 'NextTicket for ConnectWise Manage', and 'User Filter Rule For ConnectWise Manage'. Below the tabs, there are buttons for 'Batch Apply Filter' and 'Batch Apply Template'. A table lists technicians with columns: 'User Name', 'Real Name', 'Manager', 'Job Title', 'Default Next Ticket Filter', and 'Default Next Ticket Template'. The first technician, John Doo, has 'Default Template' selected in the 'Default Next Ticket Template' column. A dropdown menu is open for this cell, showing 'Default Template' as the selected option.

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



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

