

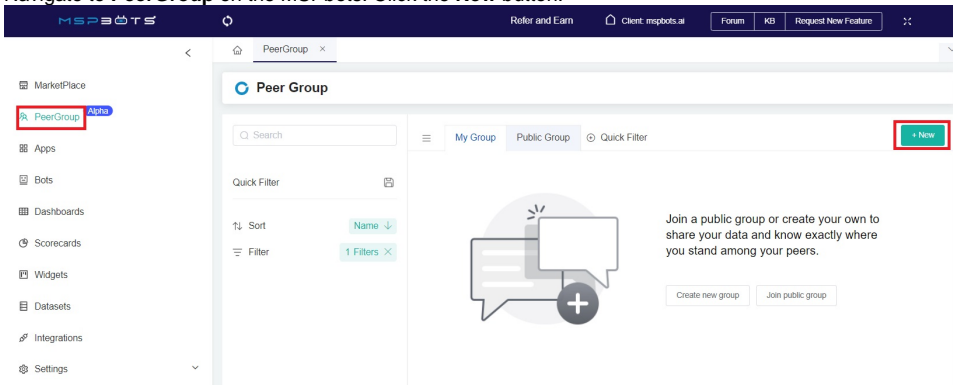
# What is PeerGroup in the MSPbots app

The PeerGroup section in the MSPbots app lists the groups where you can share data with peers and understand how you compare with them. These groups, except private ones, are accessible to MSPbots clients and users. You can apply to join any of these groups or create one for your team or company. This KB article discusses the following about PeerGroup:

- [How to create your own group](#)
- [How to invite people to join a group](#)
- [How to join a peer group](#)
- [How to set roles in a group](#)
- [How to remove group members](#)
- [How to Add a KPI for Your Peer Group \(For Captains\)](#)
- [Adding a new KPI template to your peer group KPIs](#)
- [Reviewing your KPIs and adjusting KPI settings](#)

## How to create your own group

1. Navigate to **PeerGroup** on the MSPbots. Click the **New** button.



2. On the Create New Group pop-up, provide the following under **Basic Info** then click **Next**.
  - Group name
  - Properties
    - Private - A private peer group is viewable only by group members. The group captain can invite anyone to join the group, but others cannot apply to join because the group is not visible to non-members.
    - Public - A public peer group is visible to all MSPbots users and clients., Anyone can apply to join a public group.
  - Affiliation
  - Description

- Group Meets - Create a schedule of meets and set recurring meets if needed.

Create New Group ×

✔ Basic Info > ○ Introduction > ○ Invite Members

+

Upload

\* Group Name

\* Properties

Please Select ▾

\* Affiliation

Please Select ▾

☐ Public group members

\* Description

\* Group Meets

🕒 Please Select

Asia/Manila

No Repeats ▾

Next

3. Under **Introduction**, you have the option to give users an idea of your group by providing more information like Mission and Rules. Click **Next** when done.

Create New Group ×

✔ Basic Info > ✔ Introduction > ✔ Invite Members

For easy signup, please provide the Microsoft 365 email address(es) of the invitee(s).

Email

Multiple email entries should be separated by commas, e.g., email@example.com, email2@example.com.

Description

Please enter

Previous

Create

4. In the last step, enter the Office 365 emails of the people you want to invite to the group.

Create New Group ×

✔ Basic Info

>

✔ Introduction

>

○ Invite Members

**Who Is A Good Fit For This Group?**  

Please enter

**Mission**  

Please enter

**Rules**  

Please enter

Previous

Next

5. Click the **Create** button when done. The peer group you created should now appear under the **My Group** list. If it is a public group, it will also appear under the **Public Group** list.

## How to invite people to join a group

Captains can invite anyone to join a peer group. This is done on the Members settings screen in PeerGroups of the MSPbots app.

1. Navigate to **PeerGroup**, select your peer group, and go to the **Members** tab.
2. Click the Add member icon.

MSPbots Public Testing Group

Detail

Members

Members List

Group Captains

3. Enter the Office 365 emails of the people you are inviting. Click Send Email to send your invitations. Accepting the invitation will automatically add a person to the group.

## Invite Member



Please fill in the invitee's office365 email address, so that the invitee can sign in/up MSPbots and join the group easily.

### Email

The emails are separated by commas, eg.  
email@example.com, email2@example.com

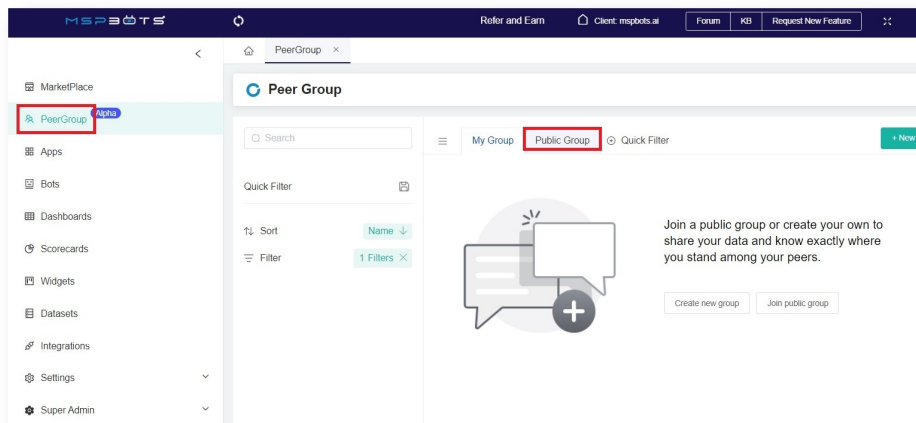
### Description

Please enter invitation description

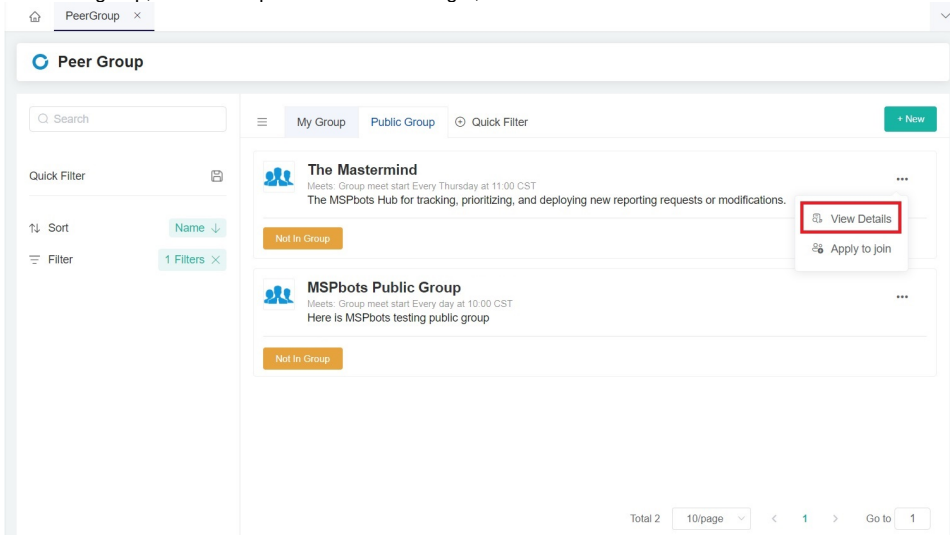
Sent Email

## How to join a peer group

1. Navigate to **PeerGroup** on the MSPbots and click the **Public Group** tab.



2. Choose a group, click the ellipsis  on the right, then select **View Details**.



Peer Group

Search

Quick Filter

Sort: Name ↓

Filter: 1 Filters ×

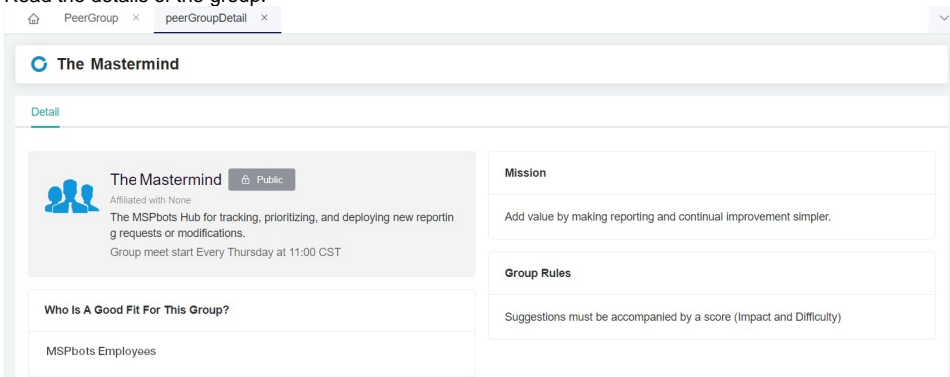
My Group Public Group Quick Filter + New

**The Mastermind**  
Meets: Group meet start Every Thursday at 11:00 CST  
The MSPbots Hub for tracking, prioritizing, and deploying new reporting requests or modifications.  
Not In Group View Details Apply to join

**MSPbots Public Group**  
Meets: Group meet start Every day at 10:00 CST  
Here is MSPbots testing public group  
Not In Group

Total 2 10/page < 1 > Go to 1

3. Read the details of the group.



The Mastermind


Detail

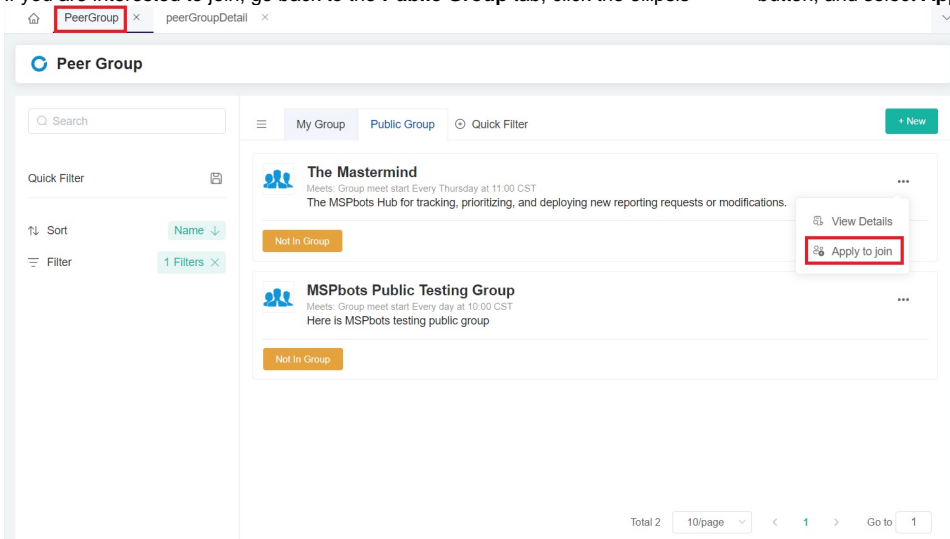
**The Mastermind** Public  
Affiliated with None  
The MSPbots Hub for tracking, prioritizing, and deploying new reporting requests or modifications.  
Group meet start Every Thursday at 11:00 CST

**Who Is A Good Fit For This Group?**  
MSPbots Employees

**Mission**  
Add value by making reporting and continual improvement simpler.

**Group Rules**  
Suggestions must be accompanied by a score (Impact and Difficulty)

4. If you are interested to join, go back to the **Public Group** tab, click the ellipsis  button, and select **Apply to join**.



Peer Group

Search

Quick Filter

Sort: Name ↓

Filter: 1 Filters ×

My Group Public Group Quick Filter + New

**The Mastermind**  
Meets: Group meet start Every Thursday at 11:00 CST  
The MSPbots Hub for tracking, prioritizing, and deploying new reporting requests or modifications.  
Not In Group View Details Apply to join

**MSPbots Public Testing Group**  
Meets: Group meet start Every day at 10:00 CST  
Here is MSPbots testing public group  
Not In Group

Total 2 10/page < 1 > Go to 1

- When the Apply pop-up appears, click **Submit** to send your application.

Apply

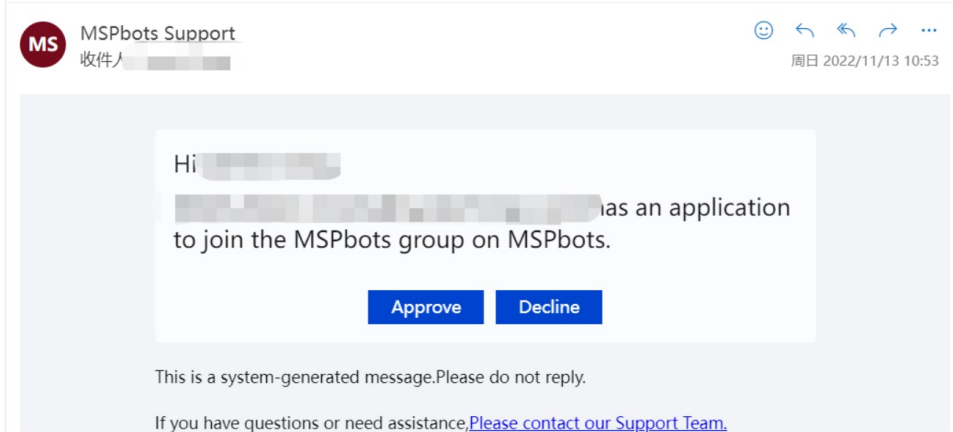
You will receive an email after your application is reviewed by the captain.

Description

Description

Submit

The group captain will receive a notification to approve or decline your application. Below is an example.

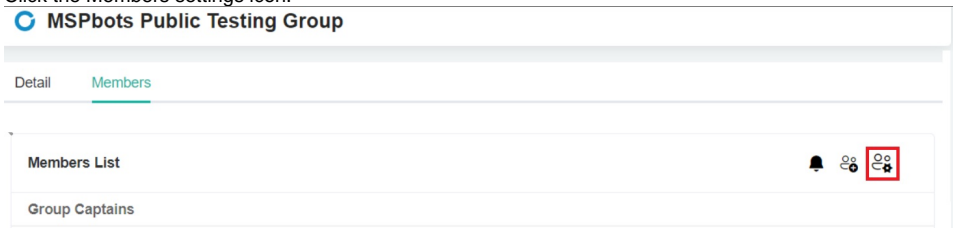


- You will receive an email notification once your application is approved. Your group will also appear under the **My Group** tab.

## How to set roles in a group

Assigning roles to group members is also done Members settings screen in PeerGroups of the MSPbots app.

- Navigate to **PeerGroup**, select your peer group, and go to the **Members** tab.
- Click the Members settings icon.



- Select the role for a given member. These are the available roles.
  - Captain - The captain role gives a member the ability to manage groups, invite people, delete members, and edit groups.

- Member - Members can view group information only.

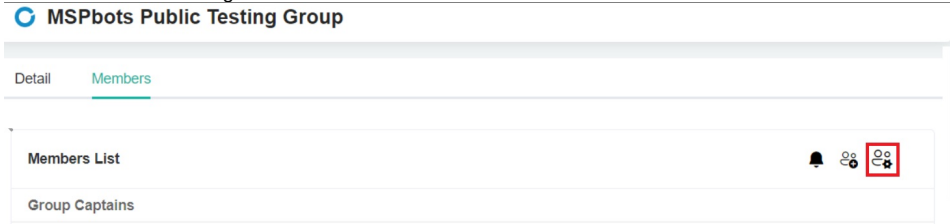
Member	×
Captain	×
Member	×
Member	×

4. Click **Save** when done.

## How to remove group members

You can delete a member from the group by clicking the **x** button that corresponds to the member.

1. Navigate to **PeerGroup**, select your peer group, and go to the **Members** tab.
2. Click the Members settings icon.



3. Click the **x** button that corresponds to the member to be removed and click **Save**.

Member	×
Captain	×
Member	×
Member	×

## How to Add a KPI for Your Peer Group (For Captains)

Group captains can add key performance indicators (KPIs) for their peer groups by selecting a KPI from the KPI Templates and adding it to My KPIs. A group's KPIs and the resulting data are viewed from the Benchmark tab and can be adjusted in the KPI Settings.

What's in this article:

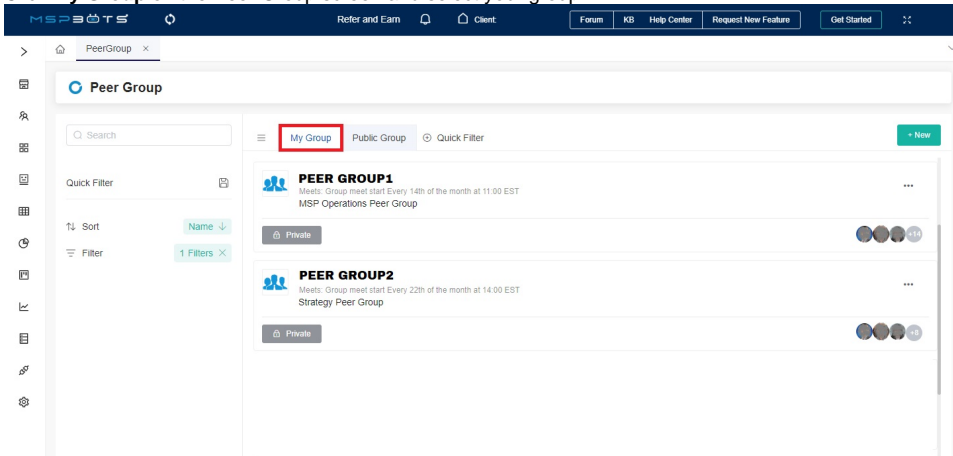
- [Adding a new KPI template to your peer group KPIs](#)
- [Reviewing your KPIs and adjusting KPI settings](#)

## Adding a new KPI template to your peer group KPIs

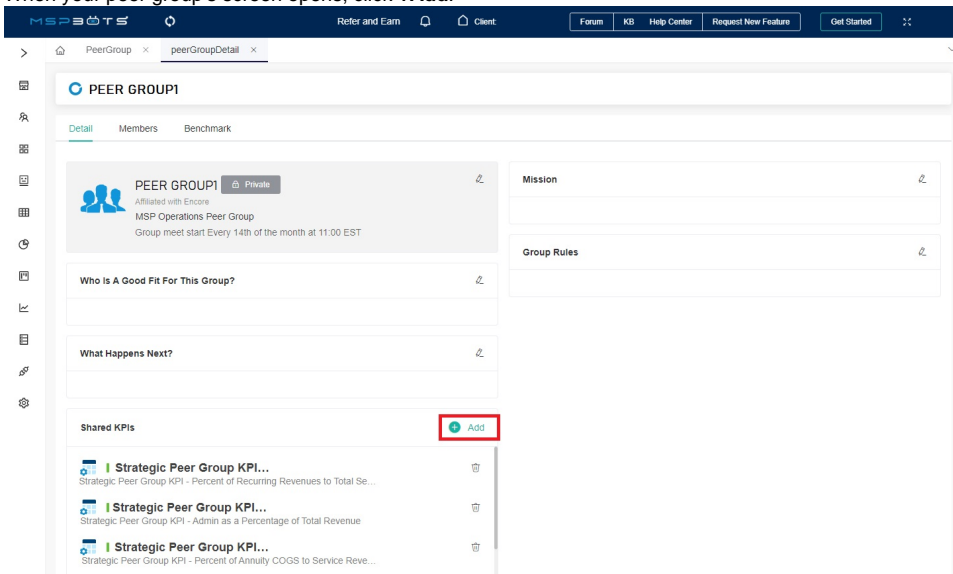
To add a KPI:

Adding KPI template widgets is restricted to group captains only. Group members have view-only access to the benchmarks.

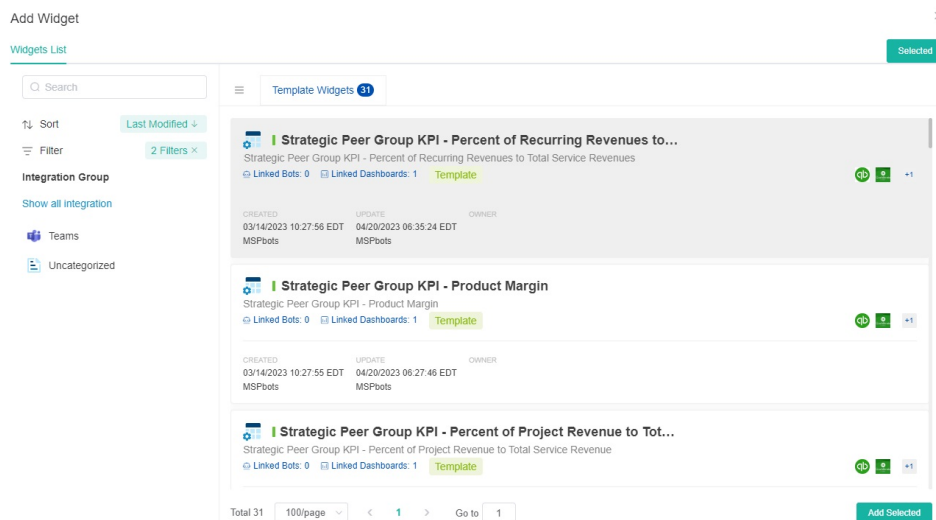
1. Go to **PeerGroup** on the MSPbots app.
2. Click **My Group** on the Peer Group screen and select your group.



3. When your peer group's screen opens, click **+Add**.



4. Go through the list of Template Widgets and select the KPI widget for adding.



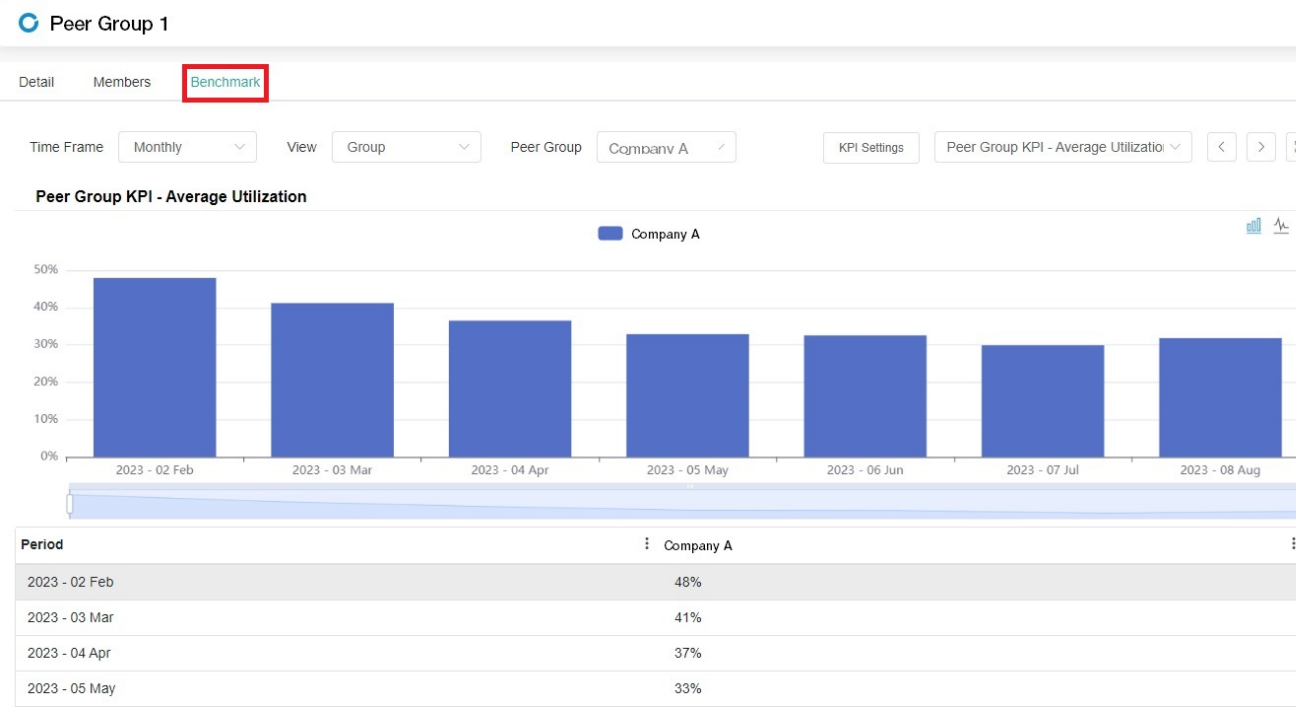
5. Click **Add Selected**. The KPI is added to the group's Shared KPI list and the KPI dropdown list on the Benchmark tab.

Remember to select a KPI widget with "Peer Group" in the widget name to ensure you are adding a peer group KPI widget.

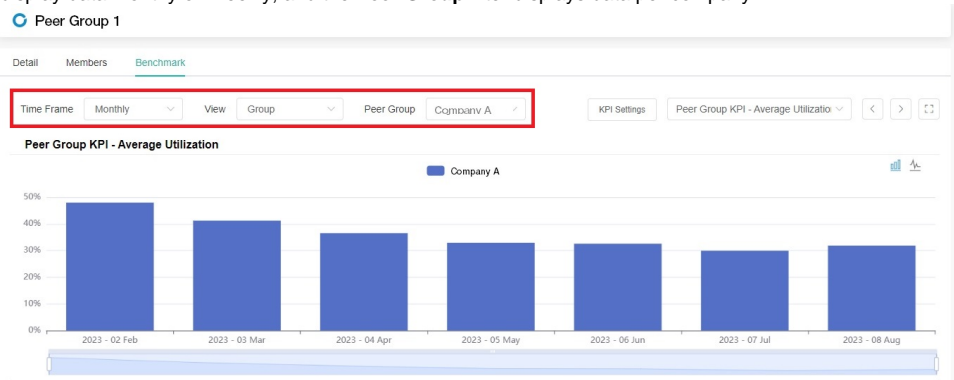


# Reviewing your KPIs and adjusting KPI settings

To view the KPIs, open your peer group and go to **Benchmark** where you compare data among your tenants or peers. Below are the features and functions in the Benchmark tab:



- **Dashboard filters** - This section displays the filters set in the widget settings. In the image below, the **Time Frame** filter gives the option to display data Monthly or Weekly, and the **Peer Group** filter displays data per company.



- **KPI Settings** - When clicked, this button opens the KPI window where you view and adjust the KPIs displayed in the widgets. These settings are applied to all Peer Groups with the same KPI widget settings but will not affect the KPI settings of other tenants.

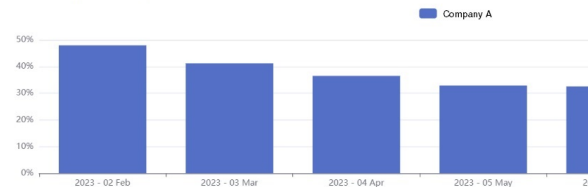
Peer Group 1

Detail Members Benchmark

Time Frame Monthly View Group Peer Group Company A

KPI Settings Peer Group KPI - Average Utilization

Peer Group KPI - Average Utilization



Period	Company A
2023 - 02 Feb	48%
2023 - 03 Mar	41%
2023 - 04 Apr	37%
2023 - 05 May	33%

KPI Settings

Active and MMR Clients

Company Type / Classification

Block Hour Client @ Blue @ Client @ Delinquent @ Competitor @ Former Client @ Ignored Company

Agreement Type / Contract Category

Cloud Services @ Backup @

Excluded Company

Updated Client Groupings @ Blocked Company @ Ignored Company

Cancel Save

- **KPI widget dropdown** - Select a KPI widget from the dropdown list to view data for each KPI.

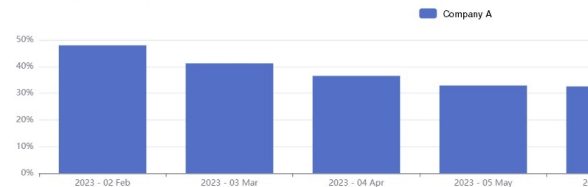
Peer Group 1

Detail Members Benchmark

Time Frame Monthly View Group Peer Group Company A

KPI Settings Peer Group KPI - Average Utilization

Peer Group KPI - Average Utilization



Period	Company A
2023 - 02 Feb	48%
2023 - 03 Mar	41%
2023 - 04 Apr	37%
2023 - 05 May	33%

- **KPI Widget switcher** - Click these buttons to switch your view from left to right, from one KPI to the next.

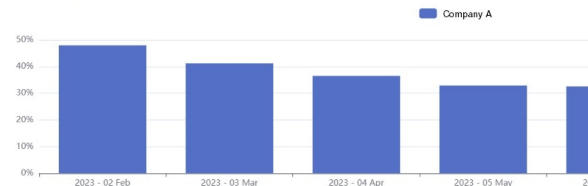
Peer Group 1

Detail Members Benchmark

Time Frame Monthly View Group Peer Group Company A

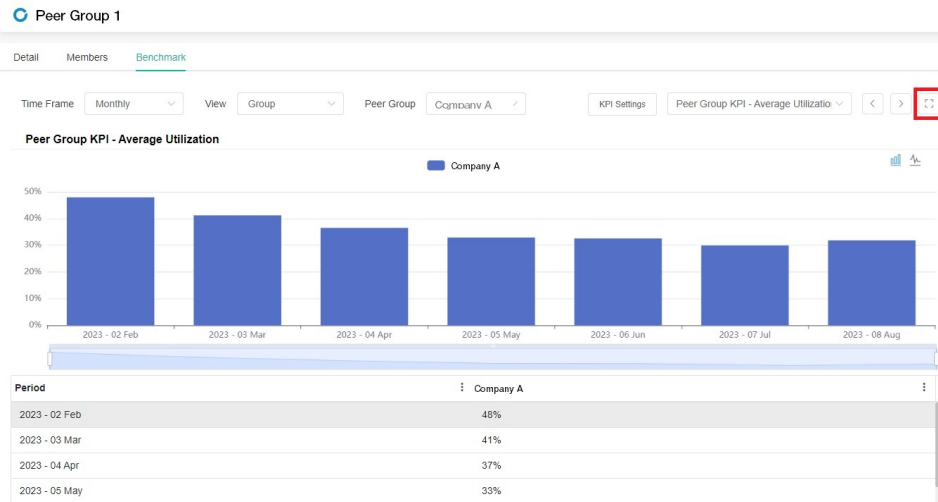
KPI Settings Peer Group KPI - Average Utilization

Peer Group KPI - Average Utilization

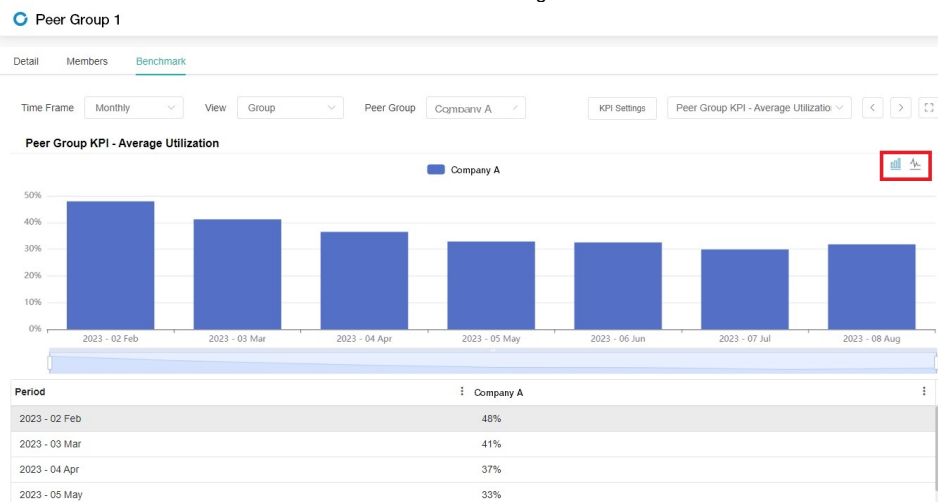


Period	Company A
2023 - 02 Feb	48%
2023 - 03 Mar	41%
2023 - 04 Apr	37%
2023 - 05 May	33%

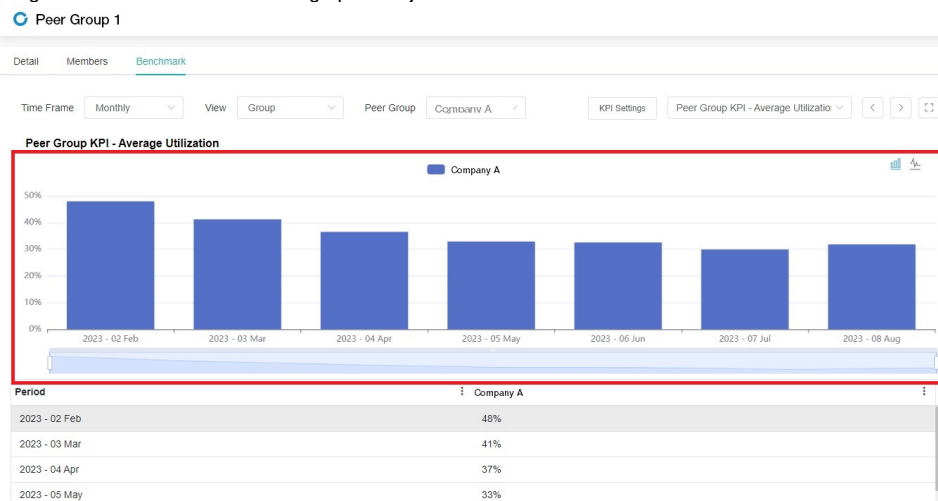
- **Full-Screen viewer** - Select the **full-screen** button to view the KPI widgets in full-screen mode.



- **Chart switch** - Click the **bar chart** icon to view the data using a bar chart or click the **line chart** icon to view data using a line chart.



- **Customize the x-axis data** - Hover over the graph and scroll the mouse wheel to adjust the data displayed on the x-axis. Alternatively, you can drag the ends of the bar below the graph to adjust the data.



## Related Topics

- [How to Sign Up with Encore GAIN Peer Group Benchmarking](#)
- [How to Add a KPI for Your Peer Group](#)

