

NextTicket Manager

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1. What is the NextTicket Manager app?

Instead of training your dispatchers or technicians how to pick the most important tickets, NextTicket auto dispatcher uses an easy-to-use priority point system to auto-calculate the priority of tickets. The NextTicket Manager app can:

- Save 80% of ticket dispatchers' time
- Eliminate cherry picking, random picking, and ticket black hole
- Save at least 10-20 minutes per technician every day
- Prioritize tickets a lot faster and more accurately than humans can
- Scalable and available 24/7

2. How to access NextTicket Manager

Navigate to **Apps** on the MSPbots menu and open the NextTicket app. Currently, NextTicket supports ConnectWise Manage, Autotask, and Syncro. More integrations are to be released every month.

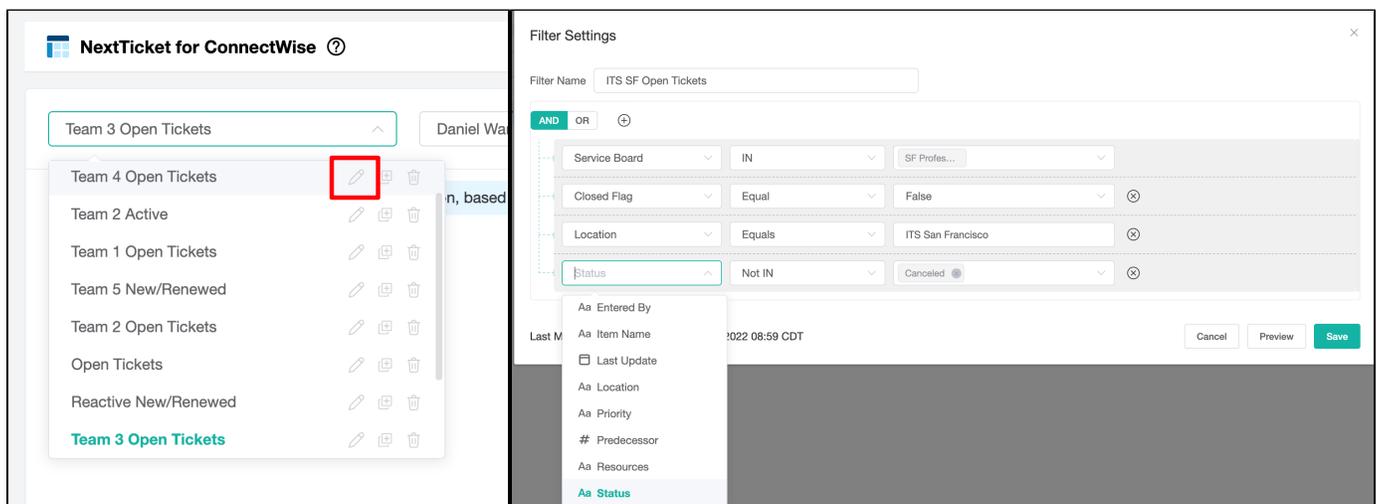
For technicians, type "NT" in MSPbots App in Teams.

3. Setting up NextTicket Manager

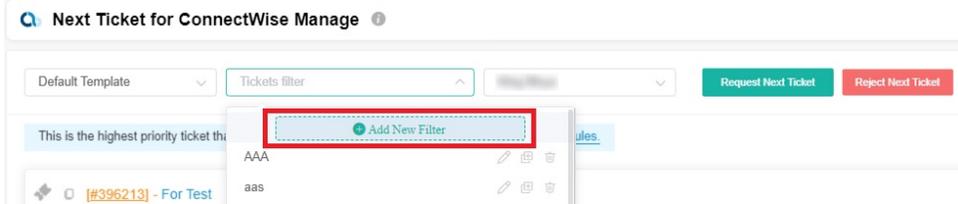
Only MSPbots admins have permission to manage the settings. Click **Settings** on the upper right corner of the screen to view the NextTicket Settings tab.

3.1. Set up ticket filters

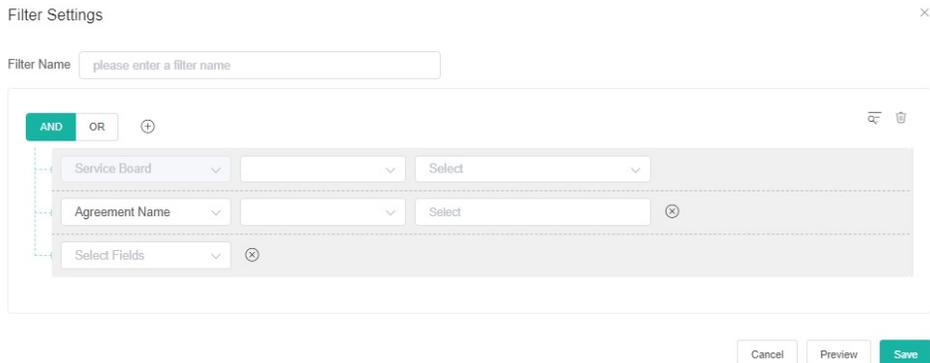
Filters are used to determine which tickets should be calculated. You can define the filter conditions using the dropdown menu and exclude the tickets that you don't want the technicians to see.



1. In the **NextTicket for ConnectWise** tab, select the **Tickets filter** list and click **Add new filter**.



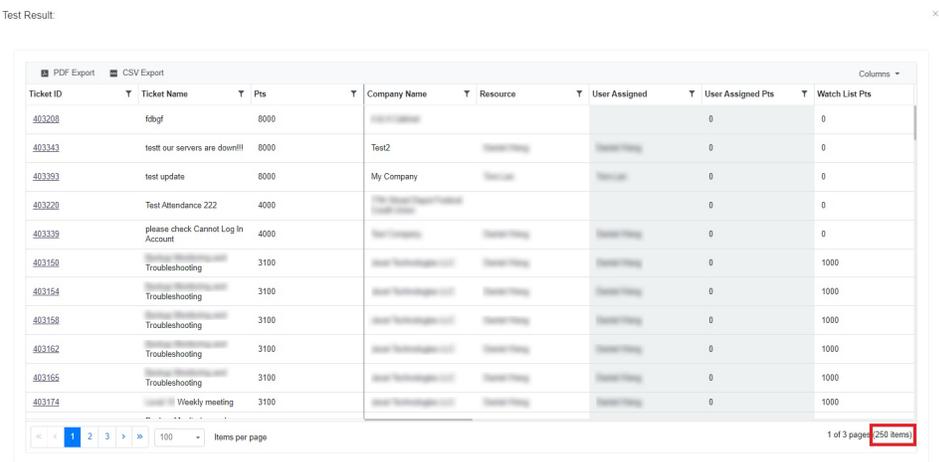
2. Please fill in the **Filter Name** field and the filter conditions. When two new boxes or lists appear beside the **Select Fields** list, specify the other specifications of the filter. You must have a service board (Or Queue) field for the NextTicket app to work.



3. You can also click **Preview** to enter the "Test Result:" pop-up window to check if your new filter settings or conditions are valid before you save the changes. 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.



4. When you're done setting up the filter, click **Save**.

3.1.1. Best Practice for setting up ticket filters:

Divide your technician into roles, the most popular way is by reactive, proactive, and project. If you have a lot of technicians, divide them into pods based on the Territory, Zipcode, industry, companies, etc.

1. If you ask a technician to handle more than 200 tickets, they will not be very familiar with the company information
2. Even if you can use some good documentation system, it is still better, easier, and faster if you can let a technician focus on the tickets generated by less than 60-100 companies.

3.2. Set up priority rules

This is the most important step in order to release the power of the NextTicket.

Priority rules are used to calculate the ticket priority. The flexible points system engine helps you digitize dispatch policy or rules.

See more info in [Setting Up the Point System for NextTicket Priority Rules](#).

3.3. Setup default filter and Priority points rules for each tech

After you hire a tech, please set up the default filter and priority rule template for each tech. These settings will be used to determine when users type "NT" in teams. For the web interface, people can select what they want.

4. NextTicket Priority Rules Sample

These are examples of how you can assign points to priority rules. New rules are being added. Please check the app for the most updated list.

The screenshot displays the 'NextTicket For ConnectWise Settings' interface, specifically the 'Priority Point rules' section. The interface includes a header with navigation options like 'Load Default All', 'Test All', and 'Save All'. Below the header, there are two dropdown menus: 'Reactive Service Open Tickets' and 'User'. The main content area lists several rules, each with a toggle switch, a description, and a configuration field for points. The rules are:

- Assigned to User:** If the ticket is assigned to the current user, indicate the points to be added. Configuration: 'If this ticket is assigned to current user, add 1000 points.'
- Company Status:** Select a company status and add indicate the points to be added. Configuration: 'If ticket company status = Credit Hold +1, add -10000 points.'
- Company Type:** Select a company type and indicate the points to be added when it is matched. Configuration: 'If ticket company type = , the add 1000 points.'
- Company in "Watch List":** Indicate the points to be added if a company is in the watch list. Configuration: 'If the ticket is from a company that's in your "Watch List", add 1000 points.'
- Company is Matched to User:** Select a ticket company where the ticket was logged from and the person they are requesting to handle it then assign corresponding points. Configuration: 'If ticket company = , and requested user to handle the ticket = , add 1000 points.'
- Contact Type:** Add corresponding points to the ticket when it matches the contact type selected.
- Contact's Job Title:** Select a Job Title of the person who logged the ticket and assign corresponding points. Configuration: 'If the contact's job title = CEO, Add 100 points.', 'If the contact's job title = president, Add 100 points.', 'If the contact's job title = manager, Add 100 points.', 'If the contact's job title = partner, Add 100 points.'
- Customer Responded:** If the "Customer Responded" field is ticked on the ticket, add corresponding points. Configuration: 'If "Customer Responded" box is checked in the ticket, add 1000 points.'
- In Progress Ticket:** Deduct Point to tickets that are currently In-Progress so it would be a lower priority to other users. Configuration: 'If ticket status = In Progress for other users, reduce 10000 points. For user who changed the status to in-progress, add 10000 points.'
- MRR:** Set how many points to be added on a ticket every \$1 of MRR. Configuration: 'Add 1 points every 1\$ of Agreement MRR.'
- Past Due Date:** Set how many points to be added on a ticket every hour past its due date.

Priority Type
Set how many points to be added on a ticket depending on its priority type

If ticket priority = Priority... , add 1000 points.

If ticket priority = Priority... , add 2000 points.

If ticket priority = Priority... , add 3000 points.

If ticket priority = Do First , add 4000 points.

SLA

If SLA resolution expiration time < 0 minutes, add 20000 points.

If SLA resolution expiration time < 60 minutes, add 10000 points.

If SLA resolution expiration time < 120 minutes, add 8000 points.

If SLA resolution expiration time < 180 minutes, add 6000 points.

If SLA resolution expiration time < 240 minutes, add 3000 points.

If SLA resolution expiration time < 480 minutes, add 1000 points.

SLA Per Minutes

For every minute of SLA resolution expiration time, add -1 points.

Scheduled Status
Select a scheduled status and add corresponding points when it is within the minimum and maximum time set before/after its start/end time.

If scheduled status = Firm @ +1 , resource include Current... and current time is 15 Mins Before the Start Time of the schedule, add -100000 points.

If scheduled status = Firm @ +1 , resource include and current time is 1 Mins After the End Time of the schedule, add 100000 points.

Ticket Owner
If the ticket owner is the current user, indicate the points to be added

If user is assigned as the ticket owner, add 1000 points.

Ticket Status VS User
Add corresponding points to a ticket if it is in the selected status with a certain requested user to handle the ticket

If ticket status = , and requested user to handle the ticket , add 0 points.

Ticket Summary
Identify a keyword that might be in the ticket summary and add corresponding points if it is present

If ticket summary includes HACK, EMERGENCY, HELP , add 1000 points.

Time In Status Based On Time Point
Add corresponding points to a ticket when it has been in a selected status for more than or less than a specified duration.

If ticket status = , and time in status , then add 1000 points.

Time In Status Per Hour
Set how many points to be added on a ticket in every hour that it is still on the same status

If ticket status = , add points in every hour that it is still on the same status.

Time In Status Per Minute
Set how many points to be added on a ticket in every minute that it is still on the same status

If ticket status = , add points in every minute that it is still on the same status.

Time from Last Update
Set how many points to be added on a ticket every hour past its last update time

If the ticket in following statuses , Add 20 points to this ticket every hour from its last update time.

User's Skills And Ticket Type Match
Add corresponding points if the user's skillset matches the selected skills for this filter.

If ticket board = , and type = , and subtype = , and item = , if user has following skills: , add 1000 points.

4.1. Request more rules and submit a bug report

Please send an email to support@mspbots.ai.