

NextTicket for Autotask

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1. App Description

The NextTicket app is an automated ticket dispatch system that gives the technicians and dispatchers a portal where they can identify the next ticket that will be worked on. The dispatching is based on a scoring system identified by the organization considering predefined rules that will help deliver value to the MSP faster.

2. How to access the app

To access the Next Ticket app for Autotask in MSPbots, follow these steps:

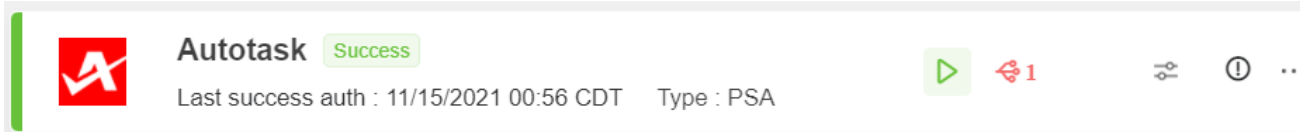
1. Go to app.mspbots.ai
2. Click **Apps** in the left pane.
3. When the **Apps** tab opens, click **NextTicket for Autotask**.

3. Why should you care?

- *For Owner and Service Managers:* The Next Ticket app is going to provide an automated way of dispatching tickets to technicians. It also helps ensure that technicians and dispatchers are more objective in catering tickets based on their priority, importance, and time criticality.
- *For Dispatchers:* This feature gives dispatchers an automated way of dispatching tickets in a few clicks. And you also have a way to see the highest ticket priority for each technician considering their skillset.
- *For Technicians:* This feature helps technicians easily identify what ticket they should work on next. If technicians can't work on the ticket, they can reject it as long as they specify the reason. Technicians can also monitor their scheduled tickets for the day on the same page.

4. Prerequisites

- Autotask Integration



- Set Up Priority Rules (only Admin users can modify these on the **Settings** tab).
- Optional: Add Companies to **Watch List**.

5. Admin Users: Setup Procedures

Only Admin users have permission to adjust the settings for the Next Ticket app.

5.1. Set the ticket filter

You can set filters that can help you narrow down the tickets applicable to each technician.

To set the ticket filter, follow these steps:

1. On the **NextTicket for Autotask** screen, select the **Tickets filter** list, and then click **Add New Filter**.
2. When the **Filter Settings** window opens, enter the name of the filter in the **Filter Name** box.
3. In the center pane, select the applicable filter type from the **Select Fields** list.
4. When two new boxes or lists appear beside the **Select Fields** list, specify the other specifications of the filter.
 - If you want to add more groups or conditions for the filter, click the plus symbol below **Filter Name**, and then select either **Add Group** or **Add Condition**.
 - You can also click **Preview** to check if your new filter settings or conditions are valid before you save the changes.
5. When you're done setting up the filter, click **Save**.

5.2. Delete filter conditions

In the **Filter Settings** window, you can either delete filter conditions individually or delete them all at once.

To delete filter conditions individually, click the  icon corresponding to the condition that you want to delete.

To delete all filter conditions at once, click the  icon, and then click **Clear All**.

5.3. Reject the top-priority ticket of a user

On the **NextTicket for AutoTask** screen, after you select a filter and a user, the **Request Next Ticket** option automatically refreshes, and then the details of the user's top priority ticket appear on the screen. If you think that the ticket should not be the top priority ticket of the user, you can reject the ticket. It is also necessary to specify the reason why the user can't work on the ticket.

To reject the top priority ticket of a user, follow these steps:


1. On the **NextTicket for AutoTask** screen, select the applicable filter from the **Tickets filter** list.
2. From the **User** list, select the applicable user to see his or her top priority ticket.
3. Once the details of the user's top priority ticket appear on the screen, click **Reject Next Ticket**.
4. When the **Reject Reason** window opens, select or type the reason why you want to reject the ticket, and then click **Save**.

5.4. Set up the point system for priority rules

You can define the point system for the priority rules of the Next Ticket app. This point system affects the prioritization of the tickets for the users.

To set up the point system, follow these steps:

1. On the **NextTicket for AutoTask** screen, click **Settings**.
2. When the **NextTicket For AutoTask Settings** screen opens, select the applicable options in the **Tickets filter** and **User** lists.
3. Set up the priority rules. You can refer to the *Priority Rules and Functions* table for reference.

By default, the rows of priority rules are expanded. You can click the **Click to Collapse All** symbol  beside **Priority Point rules** to collapse all rows of priority rules.

4. After setting up each priority rule, you can do any of the following:
 - Click **Load Default** to load the default value for the rule.
 - Click **Save Default** to save the new priority rule value as the default value.
 - Click **Save & Test** to save the changes for the specific priority rule and to test the values of the rule.
 - Click **Save** to save the changes for the specific priority rule.
5. After setting up all your preferred priority rules, do any of the following:
 - Click **Test All** to verify if the resulting prioritization is according to your needs.
 - Click **Load Default All** to load the default values for all the priority rules.
 - Click **Save All** to save the changes for all the priority rules.

Priority Rules and Functions

Priority Rule	Function
Assigned to User	Indicate the points to be added to a ticket if it is assigned to the selected user.
Company Classification	
Company Type	Select a company type of a company from where the ticket was logged, and then indicate the corresponding points to be added to a ticket if the criterion is met.
Company in "Watch List"	Indicate the points to be added to a ticket if a company is on the watch list.

Company is Matched to User	Select a company from where the ticket was logged, and then select the technician requested to handle the ticket. Lastly, indicate the corresponding points to be added to a ticket if the criteria are met.
Contact's Job Title	Select the job title of the person who logged the ticket, and then indicate the corresponding points for the criteria.
In Progress Ticket	Indicate the points to be deducted from the ticket if it is in progress for other users or points to be added to the ticket if the user changed the ticket status to In Progress. If somebody else is already working on a ticket, dispatching it to another user might cause an overlap. However, when a ticket has been in progress for too long that the original user assigned to it may have forgotten to continue working on it, 'Time In Certain Status' and 'Time from Last Update' priority rules can be adjusted to ensure these tickets won't be buried in the pool.
Past Due Date	Indicate the points to be added to a ticket for every hour past its due date.
Priority Type	Indicate the points to be added to a ticket based on a specific priority level.
Selected Assigned	Indicate the points to be added to a ticket based on a specific status and requested user.
Ticket Status to User	Indicate the points to be added to a ticket based on a specific status and requested user.
Ticket Title	For this priority rule, specify a keyword, and then add corresponding points if the ticket has the keyword in the title.
Time In Status Based On Time Point	Indicate the points to be added to a ticket if it has been in the specified status for more than or less than the specified duration.
Time In Status Per Hour	Indicate the points to be added to a ticket for every hour that it has been in the specified status.
Time from Last Update	Indicate the points to be added to a ticket for every minute that it has been in the specified status.

5.5. Add companies to the watch list

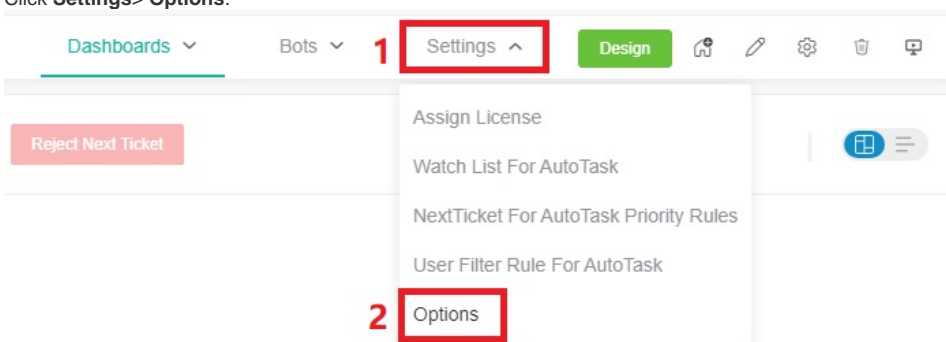
By adding companies to your watch list, you can give additional points to the tickets that they log so you can bump the priority of their tickets.

To add companies to the watch list, follow these steps:

1. On the **NextTicket for AutoTask** screen, click **Watch List**.
2. When the **Watch List** tab opens, click **Add Company**.
3. In the **Add Company** window, select the check box for the applicable companies.
You can also select the **Only show companies have agreement** check box if you want only the companies with agreements to appear on the list of companies.
4. In the **Why add to the watch list?** box, enter the reason why you want to add the selected companies to the watch list.
5. Once finished, click **Save**.

5.6. Customize Ticket URL

1. Go to **NextTicket for Autotask** app.
2. Click **Settings** > **Options**.



3. When the Options tab appears, toggle the **Customize Ticket URL** switch and enter your custom ticket URL, replacing the actual ticket number with the `{{TicketNumber}}` token.

- For example, if the original ticket URL is https://manage.mspbotssample.com/v4_6_release/ConnectWise?locale=en_US&routeTo=ServiceFV&recid=5027470, and you want to customize the ticket URL to <https://mtx.link/5027470>, you need to enter <https://mtx.link/{{TicketNumber}}> in the "Customize Ticket URL" option. So, when you click on the ticket number, the link will point to <https://mtx.link/5027470>.

The "Customize Ticket URL" feature is universal in the Attendance Manage and all NextTicket apps:



- If you toggle on the "Customize Ticket URL" switch in any one of the attendance management or all the NextTicket apps, the switch for this feature in the remaining apps will also be turned on. If you turn off the switch in any of these apps, the switch for this feature in the remaining apps will also be turned off.
- When you configured the "Customize Ticket URL" in any of these apps, it will be applied to all the remaining apps.
- If the "Customize Ticket URL" switch is turned off, the ticket links will remain as the originally generated links.

Options ✕

Basic

Customize Ticket URL

When the switch is on, the Custom Ticket URL will take effect. This URL is shared between Next Ticket and Attendance.

☒

eg. <https://mspbpts.ai/{{TicketNumber}}>

Cancel

Save

- Click **Save** to keep your settings.

6. Users or Technicians: Feature Overview and Tasks

This section guides users on how to navigate the Next Ticket app.

6.1. View your top-priority ticket

- On the **NextTicket for AutoTask** screen, you can see the top priority ticket that you can start working on.
- To view your top priority ticket, go to the **NextTicket for AutoTask** screen, and then select the applicable filter from the **Tickets filter** list.
- After you select a filter, the **Request Next Ticket** option automatically refreshes, and then the details of your next top-priority ticket appear on the screen.
- Select either **Dashboard View** or **List View** to view the ticket details.

6.2. Reject your top-priority ticket

If you think that the ticket should not be your top priority ticket, you can reject the ticket. It is also necessary to specify the reason why you can't work on the ticket.

To reject your top-priority ticket, follow these steps:

- On the **NextTicket for AutoTask** screen, select the applicable filter from the **Tickets filter** list.
- Once the details of the user's top priority ticket appear on the screen, click **Reject Next Ticket**.
- When the **Reject Reason** window opens, select or type the reason why you want to reject the ticket, and then click **Save**.

7. Viewing the dashboards

The NextTicket for AutoTask has dashboards that display NextTicket usage data like the count of NextTicket users and the number of tickets dispatched, updated, and rejected. It also has a rule report that shows the enabled rules. For more information on the NextTicket AutoTask dashboards and how to access them, read the article [NextTicket Manager for AutoTask Dashboards](#).