

NextTicket for ConnectWise Manage

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.

What's on this page:

1. App Link
2. How to access the app
3. Why should you care?
4. Prerequisites
5. Admin Users: Setup Procedures
 - 5.1. Set the ticket filter
 - 5.2. Delete filter conditions
 - 5.3. Accept or Reject the top-priority ticket
 - 5.4. Set up the point system for priority rules
 - 5.5. Add an advanced rule
 - 5.6. Add companies to the Watch List
 - 5.7. Customize Ticket URL
 - 5.8. Configure Accept ticket actions
6. Users or Technicians: Feature Overview and Tasks
 - 6.1. View your top-priority ticket
 - 6.2. Reject your top-priority ticket

1. App Link

<https://app.mspbots.ai/dashboard-1357516578732232706?pageid=1357516578732232706>

2. How to access the app

To access the NextTicket app for ConnectWise in MSPbots, follow these steps:

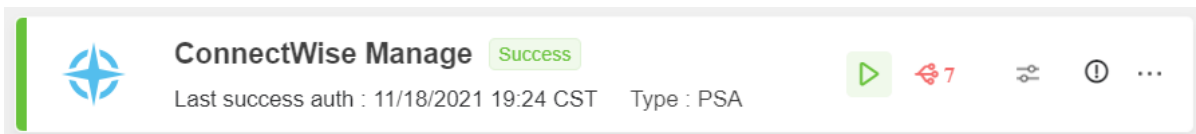
1. Go to app.mspbots.ai.
2. Click **Apps** in the left pane.
3. When the **Apps** tab opens, click **NextTicket for ConnectWise Manage**.

3. Why should you care?

- *For Owner and Service Managers:* The NextTicket 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

- ConnectWise Manage Integration



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

5. Admin Users: Setup Procedures

Only Admin users have permission to adjust the settings for the NextTicket 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 ConnectWise** 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, indicate 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. Accept or Reject the top-priority ticket

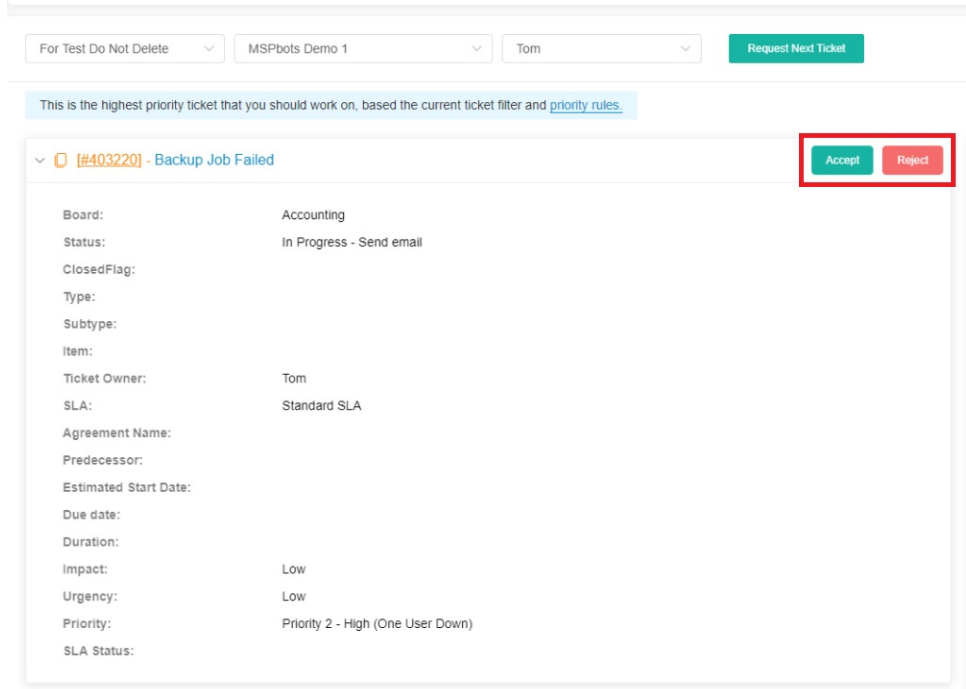
On the **NextTicket for ConnectWise** screen, after you select a filter and a user, the **Request Next Ticket** option automatically refreshes, and then the details of the user's top priority ticket appear on the screen. If you think that the ticket should not be the top priority ticket of the user,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

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

1. On the **NextTicket for ConnectWise** 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, review the details, and then click **Reject** or **Accept** the Next Ticket.
 - Reject
 - a. When the **Reject Reason** window opens, select or type the reason why you want to reject the ticket. Providing a valid rejection reason will help us to improve our rules and make the calculations more accurate.
 - b. Then click **Save**. The rejected ticket will be skipped by the Next Ticket for the next 60 minutes. We will provide you with the next ticket of highest priority.
 - Accept
 - If you have enabled the "Enable 'Accept' Button" option in [Configure Accept ticket actions](#), you can also click **Accept** to take ownership of your top-priority ticket.
 - You can only accept the next ticket for yourself. Others cannot click the Accept button for your tickets.
 - When you click **Accept**, the ticket's **Status** and **Ticket Owner** will be updated.
 - The **Status** will change to the In-Progress status you have set in [Override In-Progress Status by Board](#). If you want to learn more about setting the In-Progress status, please refer to it.
 - The **Ticket Owner** will change to you. If you have set **CW User Mapping** in User Management, the Ticket Owner will be the person you have set.

- You will receive a prompt message from the NT bot in your Teams.

Next Ticket for ConnectWise Manage



5.4. Set up the point system for priority rules

If you want to know how to set up the point system, please refer to [Setting Up the Point System for NextTicket Priority Rules](#).

5.5. Add an advanced rule

If you want to know how to add an advanced rule, please refer to [How to Create an Advanced Rule for NextTicket Manager](#).

5.6. Add companies to the Watch List

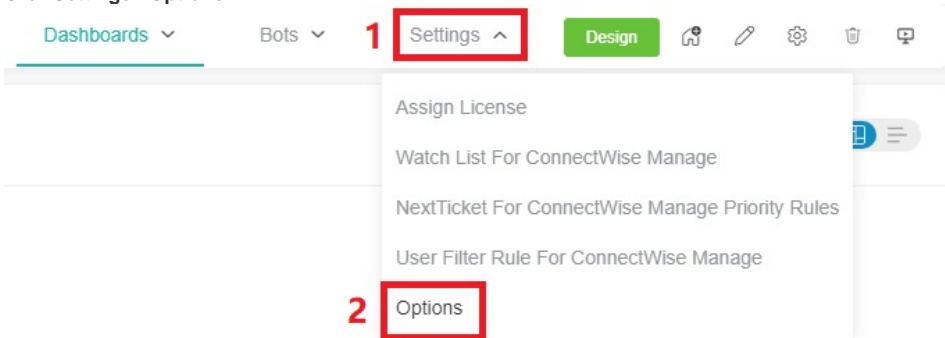
By adding companies to your watch list, you can give additional points to the tickets that they log so you can bump the priority of their tickets.

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

- On the **NextTicket for ConnectWise** screen, click **Watch List**.
- When the **Watch List** tab opens, click **Add Company**.
- In the **Add Company** window, select the checkbox 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.
- In the **Why add to the watch list?** box, enter the reason why you want to add the selected companies to the watch list.
- Once finished, click **Save**.

5.7. Customize Ticket URL

- Go to [Next Ticket for ConnectWise Manage](#) app.
- Click **Settings**> **Options**.



- 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.mspbottssample.com/v4_6_release/ConnectWise.aspx?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
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Basic
Accept Ticket Actions

Customize Ticket URL
When the switch is on, the Custom Ticket URL will take effect. This URL is shared between Next Ticket and Attendance.
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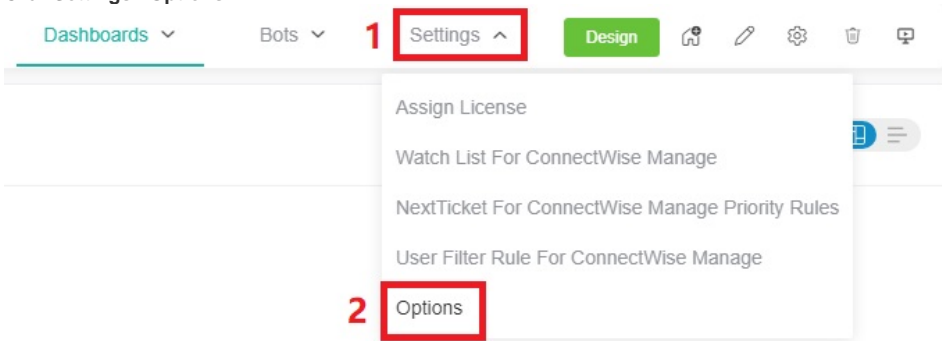
eg. <https://mspbpts.ai/{{TicketNumber}}>

Cancel
Save

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

5.8. Configure Accept ticket actions

- Go to [Next Ticket for ConnectWise Manage](#) app.
- Click **Settings**> **Options**.



- When the Options tab appears, click **Accept Ticket Actions**.
 - Enable "Accept" Button** - By turning on this switch, you will be able to accept your ConnectWise tickets in the NextTicket for ConnectWise app. The switch is closed by default. Please note that the "Accept" feature will only work properly when you have set the field in the "In-Progress Status" section.
 - In-Progress Status** - Fill in the following fields to set which ticket statuses will be displayed as "In Progress" in the personal card of the Attendance app.
 - Default In-Progress Status Name** - The name represents the status name displayed for ConnectWise tickets that are in progress on the individual card in the Attendance app. The default status name is "In-Progress".
 - Override In-Progress Status by Board** - You can set which ticket statuses will be considered as in progress when you click "Accept" for each board.
 - For example, if you set the status for tickets under the "Accounting" board as "Completed," clicking "Accept" will change those tickets to the *Completed* status. The ticket with the *Completed* status will be displayed on the Ticket

Owner's individual card in the Attendance app as "Default In-Progress Status Name - *In-Progress*."

Options✕

Basic

Accept Ticket Actions

Enable "Accept" Button

"Accept" button will be added for the next ticket result, both in teams messages and the web UI. When the button is clicked, it triggers actions configured in the bot "Next Ticket Action". By default, ticket owner and status will be updated.

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In-Progress Status

Set the in-progress status for each board, which will be used to update the ticket when users accept it in Next Ticket Manager.

Default In-Progress Status Name

We will attempt to determine the current status of this name on each board, and use the one that is found to update the ticket to in-progress.

Override In-Progress Status by Board

Board	In-progress Status	+ Add
<input type="text" value="Accounting"/>	<input type="text" value="Accounting Completed"/>	
<input type="text" value="Jexet Internal Tickets"/>	<input type="text" value="Jexet Internal Tickets open"/>	
<input type="text" value="Reactive Support1"/>	<input type="text" value="Reactive Support1 In Progres"/>	
<input type="text" value="Proactive Tasks"/>	<input type="text" value="Proactive Tasks Completed"/>	
<div><input type="button" value="Cancel"/> <input type="button" value="Save"/></div>		

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

6. Users or Technicians: Feature Overview and Tasks

This section guides users on how to navigate the NextTicket app.

6.1. View your top-priority ticket

On the **NextTicket for ConnectWise** screen, you can see the top priority ticket that you can start working on.

1. Go to the **NextTicket for ConnectWise**, and then select the applicable filter from the **Tickets filter** list.
2. 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.
3. Select either **Dashboard View** or **List View** to view the ticket details.

6.2. Reject your top-priority ticket

You can reject the ticket if you think that the ticket should not be your top-priority ticket. When rejecting the next ticket, you are required to provide the reason for the rejection. 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:

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