

Bots

Bots increase productivity beyond human work capacity by automating daily mundane and repetitive tasks. These bots are micro-trained to cut manual computing time and eliminate the risk of inaccuracies brought by human errors.

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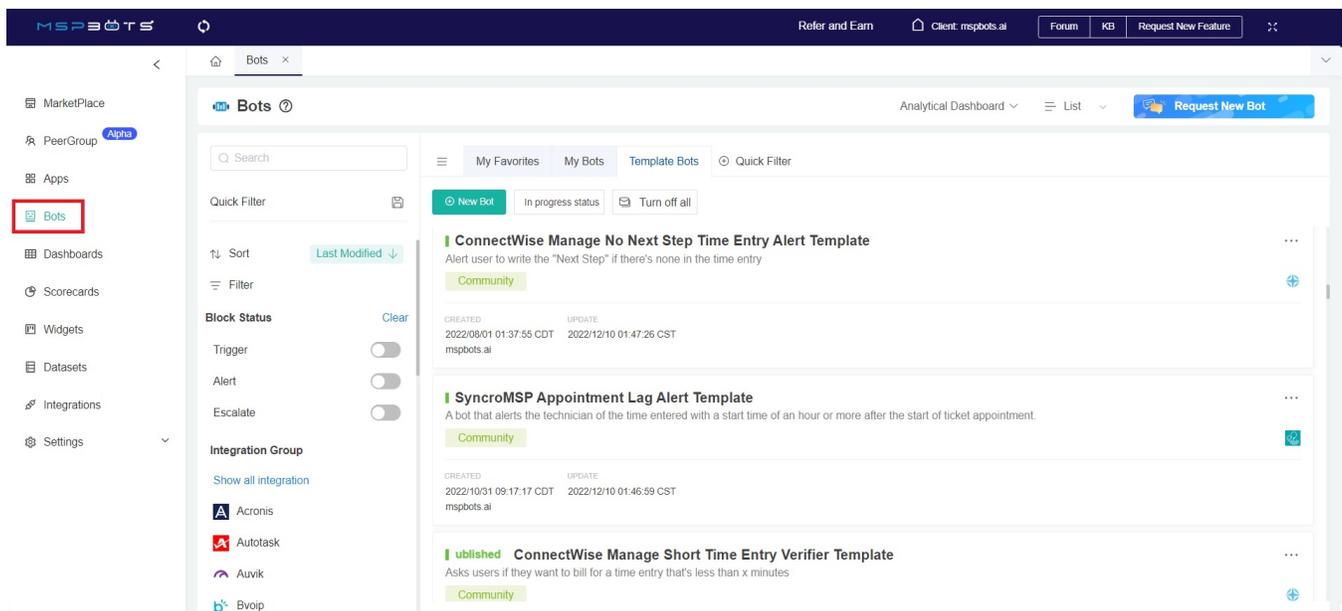
1. What is the Bots section in the MSPbots app?

The **Bots** section lists all the bots that are available for you. You can use this page to review the template bots and see which ones will be useful for your business needs.

This page is also where you can:

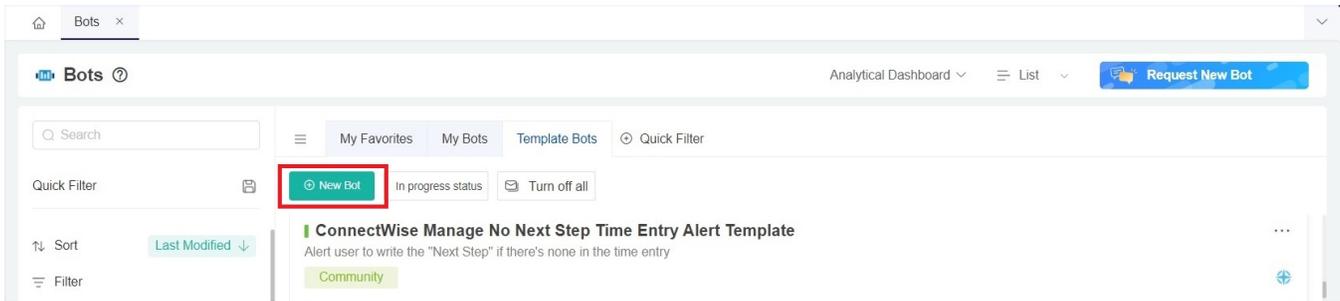
- Create new bots
- Clone template bots and customize the settings
- Edit your created bots
- Turn bots on and off

You can access the Bots tab by clicking **Bots** on the MSPbots app side menu.



2. New Bot Button

You can create your own bot by clicking the **New Bot** button.



To set up a new bot, read [How to Create a Bot](#). Currently, only the Quality Assurance Bot is available.

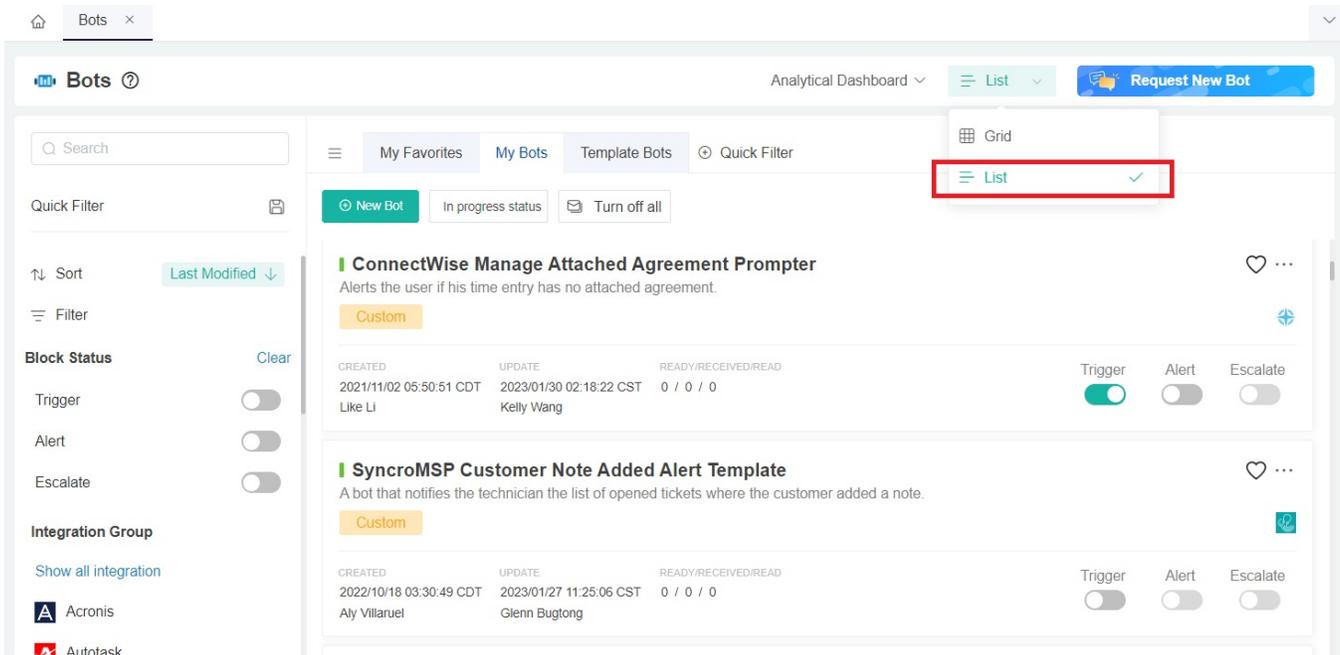
3. Analytical Dashboard

You can view and assess the performance of your bots in the Analytical Dashboards section. Here are the dashboards available:

- **Message Dashboard:** This report displays all the messages generated by bots. You can use this to review the bot messages and decide which should be adjusted.
- **Trigger Dashboard:** This report displays the message counts and gives an overview of which bots are generating the messages.
- **Usage Dashboard:** This report shows how many people are using the bots in your own company.

4. List view vs. Grid view

You can use a list or grid view to show the list of bots. The **List** view is more visually appealing and gives a quick overview of the bots.



On the other hand, the **Grid** view shows more data on the page, including buttons for the Message Report, Trigger Report, and Usage Report.

The screenshot shows the 'Bots' management page. At the top right, there is a 'Request New Bot' button. Below it, a dropdown menu is open, showing 'Grid' selected and 'List' as an alternative. The main content is a table with columns: Name, Integration, Type, Description, Trigger, and Alert. The table contains three rows of bot configurations.

Name	Integration	Type	Description	Trigger	Alert
Alert Admin When User Rejected Next Ticket	No integration	Quality Assurance Bot	This bot is generated for monitoring [Next Ticket for ConnectWise - Rejected Tickets Summary] for the reject ticket. Send the detailed information to the admin so the admin can review the reason, educate the users or modify the priority point rules to reduce the number of rejected tickets.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bot Count of Tickets (In Progress)	ConnectWise Manage	Quality Assurance Bot	This bot will alert/trigger if the count is > 5	<input type="checkbox"/>	<input type="checkbox"/>
ConnectWise All Scheduled	ConnectWise Manage	Quality Assurance Bot	Bot that alerts user(s) when there are existing tickets with status set as scheduled, but have no set scheduled date or no	<input type="checkbox"/>	<input type="checkbox"/>

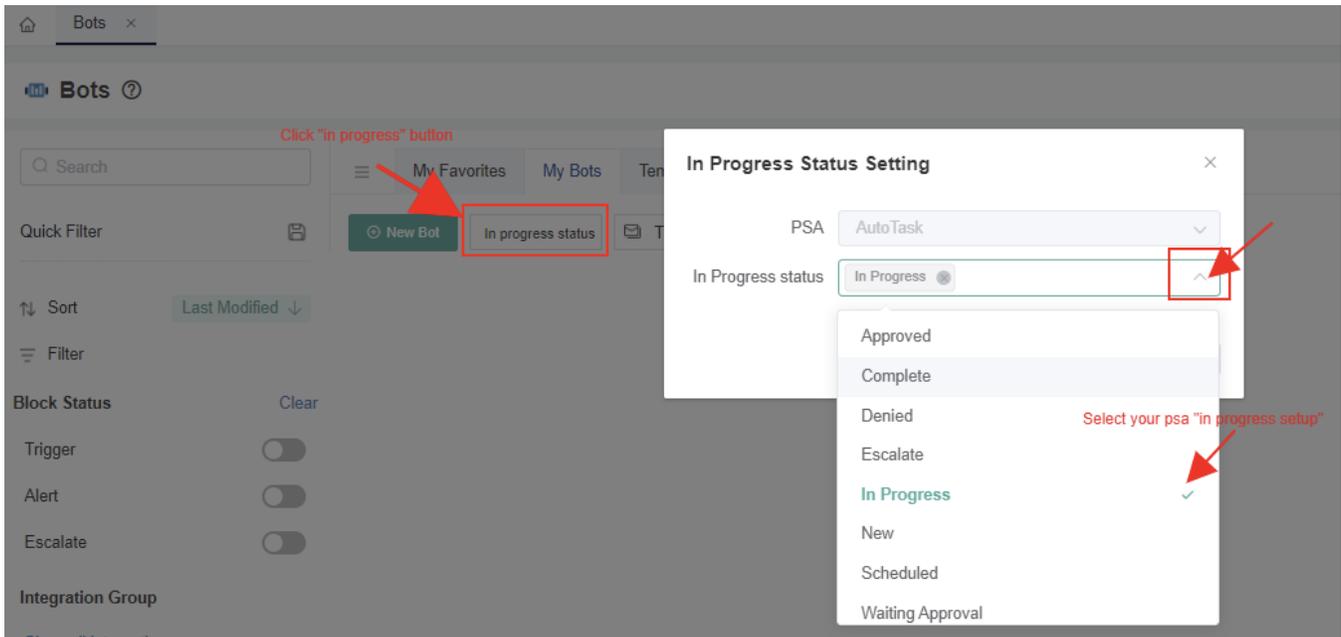
5. Request New Bot

If you have new ideas for bots you want us to develop, submit a request by clicking the **Request New Bot** button.

The screenshot shows a dark blue navigation bar with several buttons: 'Refer and Earn', 'Client: mspbots.ai', 'Forum', 'KB', and 'Request New Feature'. Below the navigation bar, there is a light blue bar with 'Analytical Dashboard' and 'List' buttons. A 'Request New Bot' button is highlighted with a red box.

6. In Progress Status (PSA Status)

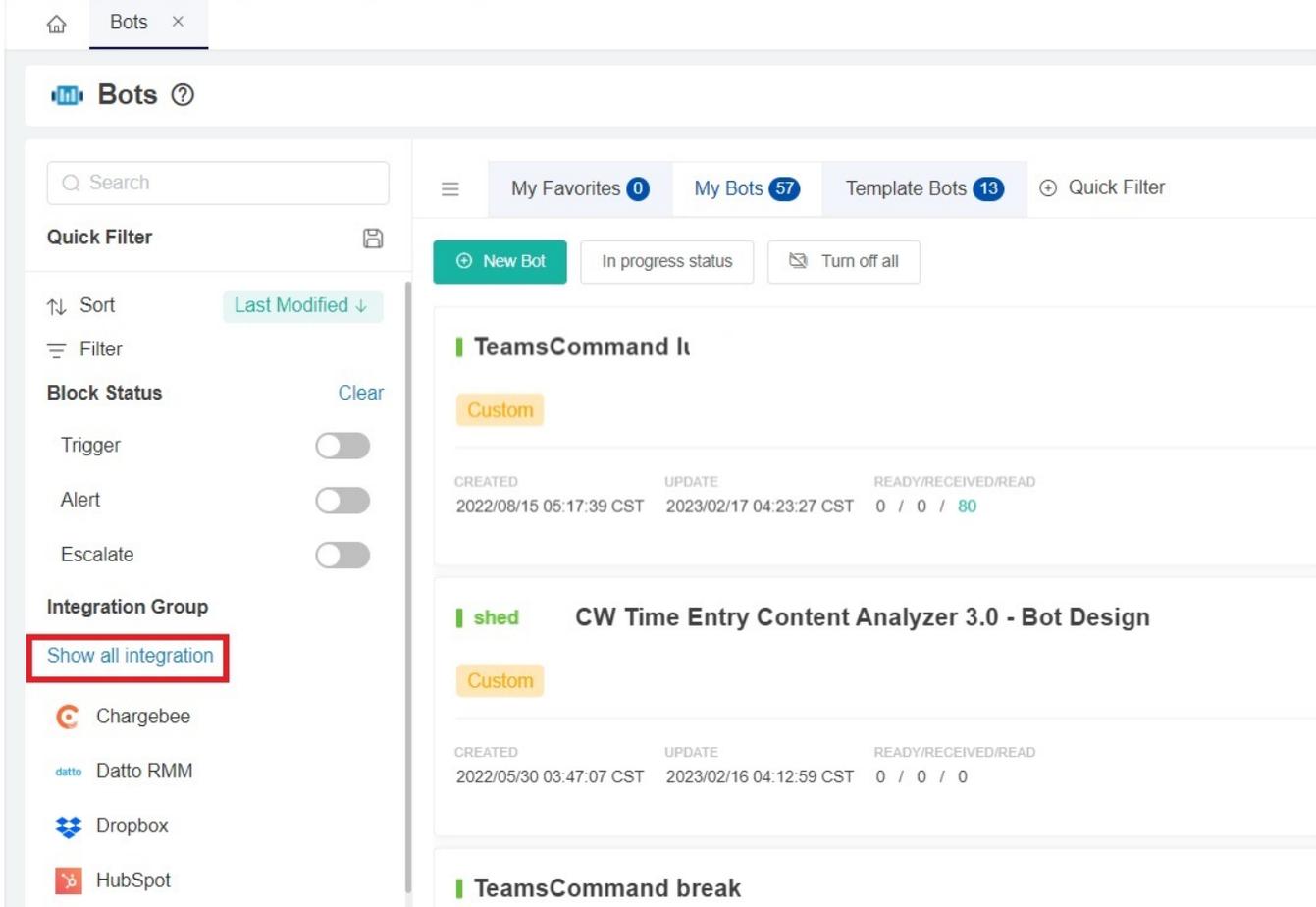
Many processes or bots related to tickets use the "In progress" status for the trigger. If your PSA uses a different name for this status, modify it by clicking the **In Progress** button and selecting a new status from the **In Progress status** list.



Note: Your selected status will be used by all the bots that use the "In progress" status like the Too Many Tickets In Progress Alert, Ticket In Progress too long, and Too Many In progress Alerts.

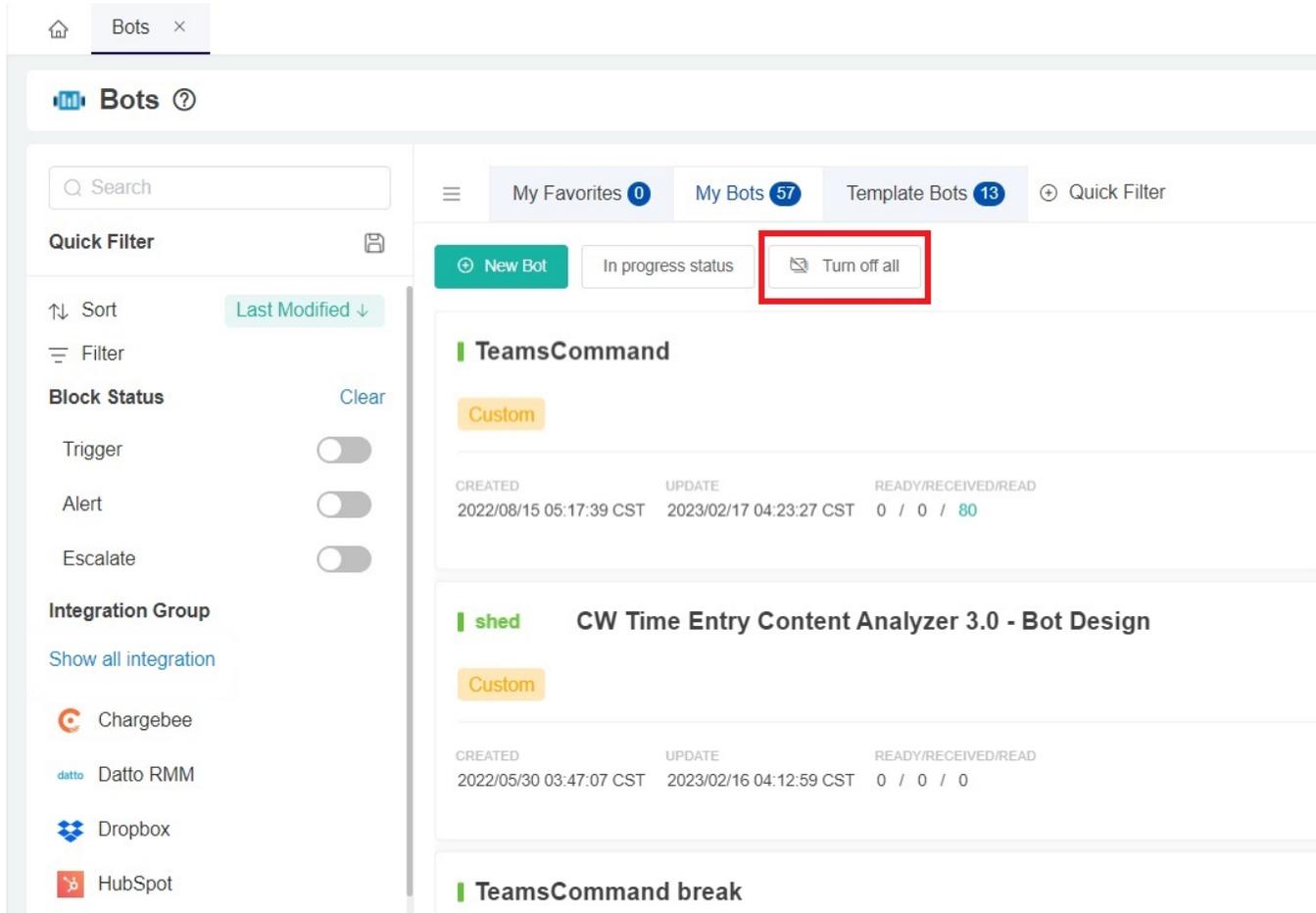
7. Show All Integration Link

By default, only the bots for your connected integrations are shown on the Bots tab. Clicking the **Show All Integration** link displays all the bots available for all integrations, including those for integrations that you are not connected to.



8. Master Message Switch (Turn Off All)

Some special or urgent cases may require you to disable all bot messages. The **Turn off all** button stops all the bots from sending messages to the end-user.



The screenshot shows the 'Bots' management interface. On the left, there is a sidebar with a search bar, a 'Quick Filter' button, and a 'Block Status' section with three toggle switches for 'Trigger', 'Alert', and 'Escalate'. Below that is an 'Integration Group' section with links to 'Show all integration' and icons for Chargebee, Datto RMM, Dropbox, and HubSpot. The main content area has a top navigation bar with 'My Favorites 0', 'My Bots 57', and 'Template Bots 13', along with a 'Quick Filter' button. Below this is a row of buttons: 'New Bot', 'In progress status', and 'Turn off all' (highlighted with a red box). The main content area displays a list of bots. The first bot is 'TeamsCommand' with a 'Custom' tag. Below it is a table with columns 'CREATED', 'UPDATE', and 'READY/RECEIVED/READ'. The second row of the table shows '2022/08/15 05:17:39 CST', '2023/02/17 04:23:27 CST', and '0 / 0 / 80'. The second bot is 'shed CW Time Entry Content Analyzer 3.0 - Bot Design' with a 'Custom' tag. Below it is another table with the same columns. The third row of the table shows '2022/05/30 03:47:07 CST', '2023/02/16 04:12:59 CST', and '0 / 0 / 0'. The third bot is 'TeamsCommand break'.

8.1. Related Topics

- [How to Create or Modify Halo Tickets using a Rest API-based Bot](#)
- [Bots: Types, Functions, and FAQs](#)
- [MSPbots 3.0 Bots for ConnectWise Manage](#)
- [Bots: How-to Guides](#)
- [Activating a Bot on the MSPbots App](#)