

How to Assign Default Filters and Rule Templates to Technicians

Admins can assign filters and rules to technicians. This article shows how to do the following:

A. Assign a NextTicket Filter

[How to apply a single filter or assign a new one to a technician](#)

[How to apply a filter to a batch of technicians](#)

[What happens when multiple filters are assigned to a technician?](#)

B. Assign a Next Ticket Template

[How to apply a single template or assign a new one to a technician](#)

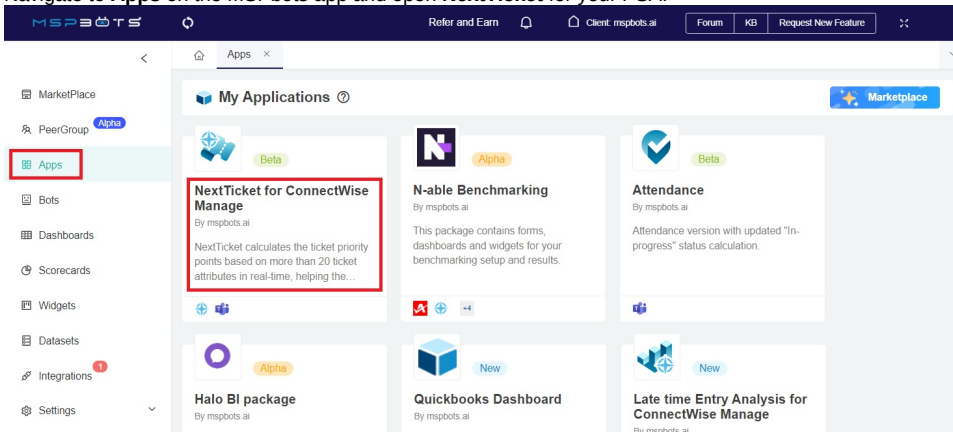
[How to apply a template to a batch of technicians](#)

A. Assign a NextTicket Filter

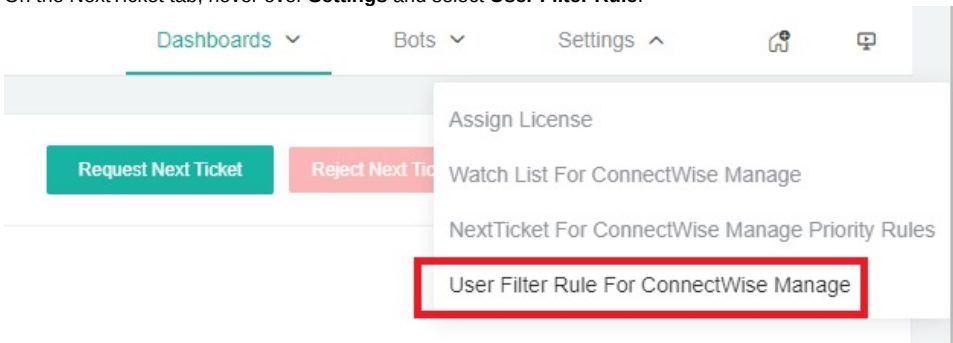
Admins can assign single or multiple filters to technicians. This is done in the User Filter Rule settings for your PSA.

How to apply a single filter or assign a new one to a technician

1. Navigate to **Apps** on the MSPbots app and open **NextTicket** for your PSA.

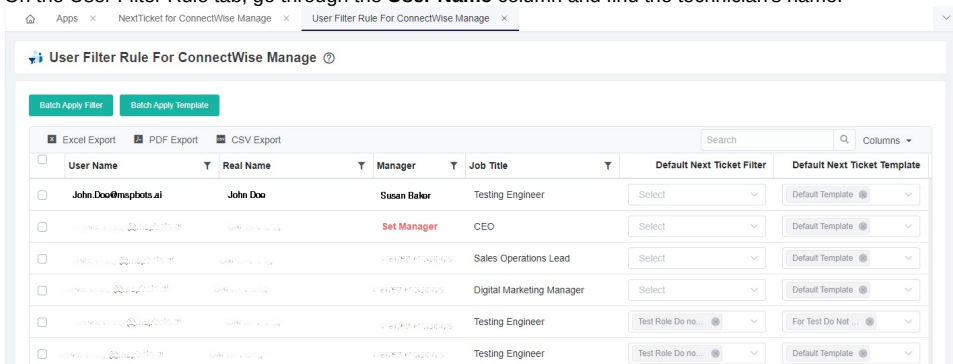


2. On the NextTicket tab, hover over **Settings** and select **User Filter Rule**.



This action will open the **User Filter Rule** tab for your PSA.

3. On the User Filter Rule tab, go through the **User Name** column and find the technician's name.



- Next, go to the **Default Next Ticket Filter** column and click the dropdown field corresponding to the technician's name.
- Select the filter you want to assign then click **Apply**.

The screenshot shows a table with columns: Job Title, Default Next Ticket Filter, and Default Next Ticket Template. A dropdown menu is open for the 'Default Next Ticket Filter' column, showing options: 'Reactive Service Open Tickets Copy' and 'Reactive Service Open Tickets' (highlighted with a red box). Below the dropdown are 'Cancel' and 'Apply' buttons, with 'Apply' also highlighted with a red box.

Job Title	Default Next Ticket Filter	Default Next Ticket Template
Testing Engineer	Select	Default Template
CEO	Reactive Service Open Tickets Copy	Default Template
Sales Operations Lead	Reactive Service Open Tickets	Default Template
Digital Marketing Manager	Default Template	Default Template
Testing Engineer	Test Role Do no...	Test Do Not ...
Testing Engineer	Test Role Do no...	Default Template

This will assign a default filter to the selected technician.

The screenshot shows a table with columns: User Name, Real Name, Manager, Job Title, Default Next Ticket Filter, and Default Next Ticket Template. The 'Default Next Ticket Filter' column is set to 'Reactive Service Open Tickets' for the first row (John Doo). The 'Manager' column is set to 'Set Manager' for the second row (Susan Baker). The 'Default Next Ticket Filter' column is set to 'Test Role Do no...' for the last two rows (Testing Engineer).

User Name	Real Name	Manager	Job Title	Default Next Ticket Filter	Default Next Ticket Template
John.Doo@mspbots.ai	John Doo	Susan Baker	Testing Engineer	Reactive Service Open Tickets	Default Template
		Set Manager	CEO	Select	Default Template
		Sales Operations Lead	Sales Operations Lead	Select	Default Template
		Digital Marketing Manager	Digital Marketing Manager	Select	Default Template
		Testing Engineer	Testing Engineer	Test Role Do no...	For Test Do Not ...
		Testing Engineer	Testing Engineer	Test Role Do no...	Default Template

How to apply a filter to a batch of technicians

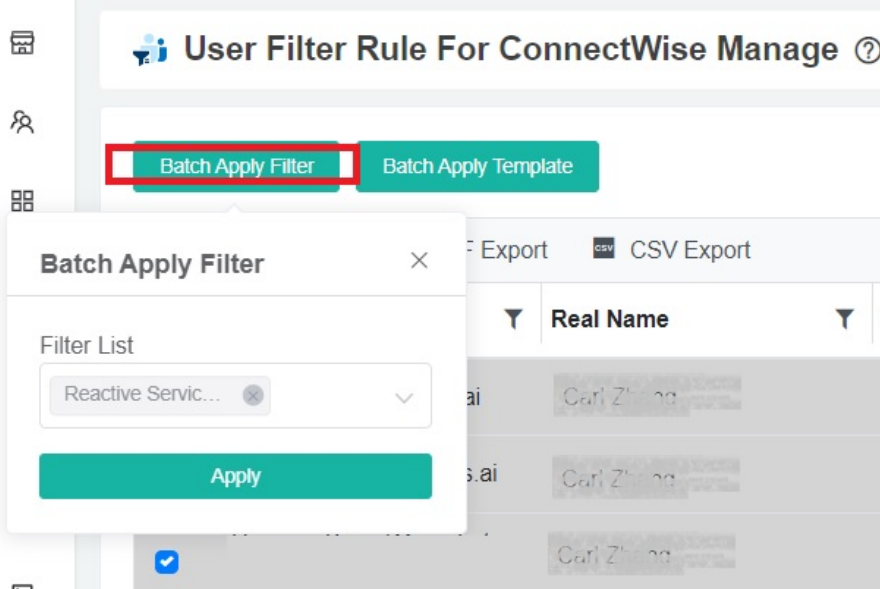
You can use the **Batch Apply Filter** button to apply the same filter to one or more technicians in a batch.

- Perform [Steps 1 and 2](#) above.
- On the User Filter Rule tab, tick the boxes corresponding to the technicians that will work on the same filter. To select all technicians, tick the box beside the **User Name** column label.

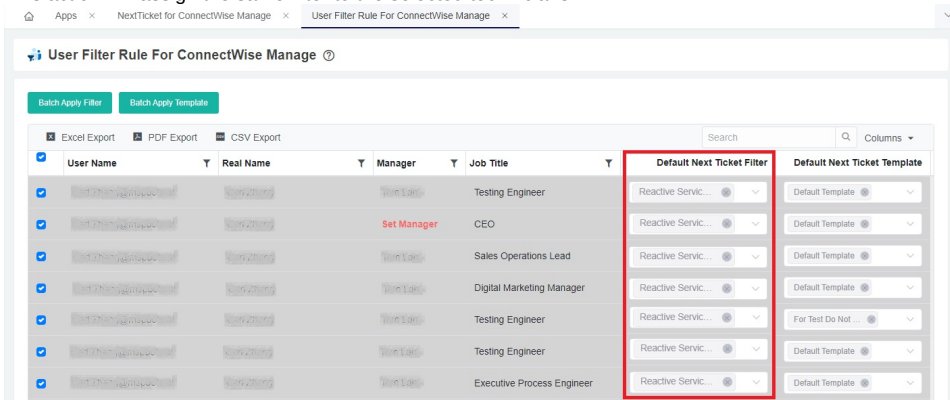
The screenshot shows a table with columns: User Name, Real Name, Manager, Job Title, Default Next Ticket Filter, and Default Next Ticket Template. The 'Batch Apply Filter' button is highlighted in green. The 'Default Next Ticket Filter' column is set to 'Reactive Service Open Tickets' for the first row (John Doo). The 'Manager' column is set to 'Set Manager' for the second row (Susan Baker). The 'Default Next Ticket Filter' column is set to 'Test Role Do no...' for the last two rows (Testing Engineer).

User Name	Real Name	Manager	Job Title	Default Next Ticket Filter	Default Next Ticket Template
John.Doo@mspbots.ai	John Doo	Susan Baker	Testing Engineer	Select	Reactive Template
		Set Manager	CEO	Select	Reactive Template
		Sales Operations Lead	Sales Operations Lead	Select	For Test Do Not ...
		Digital Marketing Manager	Digital Marketing Manager	Select	Reactive Template
		Testing Engineer	Testing Engineer	Test Role Do no...	For Test Do Not ...
		Testing Engineer	Testing Engineer	Test Role Do no...	For Test Do Not ...
		Executive Process Engineer	Executive Process Engineer	Select	Reactive Template

3. Click the **Batch Apply Filter** button, select a filter from the dropdown list, and click **Apply**.



This action will assign the same filter to the selected technicians.



What happens when multiple filters are assigned to a technician?

You can assign multiple filters to prioritize a technician's tickets. When this happens, ticketing will do a round-robin prioritization by default. For example, when a technician types **nt**, NextTicket Manager will use Filter A to identify the next priority ticket. On the second time the **nt** command is typed, Filter B will be used, then Filter C next, and so on until all the filters are applied.

Multiple filters only work on filters and not on rule templates.

B. Assign a Next Ticket Template

Admins can only assign one NextTicket Template per Technician.

How to apply a single template or assign a new one to a technician

1. Follow [Steps 1 and 2](#) in the previous section.
2. On the User Filter Rule tab, go through the **User Name** column and find the technician's name.

- Next, go to the **Default Next Ticket Template** column and click the dropdown field corresponding to the technician's name.

The screenshot shows the 'User Filter Rule For ConnectWise Manage' interface. The table has columns: User Name, Real Name, Manager, Job Title, Default Next Ticket Filter, and Default Next Ticket Template. The first row shows John Doo as a Testing Engineer, managed by Susan Baker. The 'Default Next Ticket Template' column for John Doo is highlighted with a red box, showing a dropdown menu with 'Default Template' selected. The 'Default Next Ticket Filter' column for John Doo is also highlighted with a red box, showing a dropdown menu with 'Reactive Service' selected.

- Select the template you want to assign then click **Apply**. This will apply the selected default template to the selected technician.

The screenshot shows the 'User Filter Rule For ConnectWise Manage' interface. The table has columns: User Name, Real Name, Manager, Job Title, Default Next Ticket Filter, and Default Next Ticket Template. The first row shows John Doo as a Testing Engineer, managed by Susan Baker. The 'Default Next Ticket Template' column for John Doo is highlighted with a red box, showing a dropdown menu with 'Default Template' selected. The 'Default Next Ticket Filter' column for John Doo is also highlighted with a red box, showing a dropdown menu with 'Reactive Service' selected.

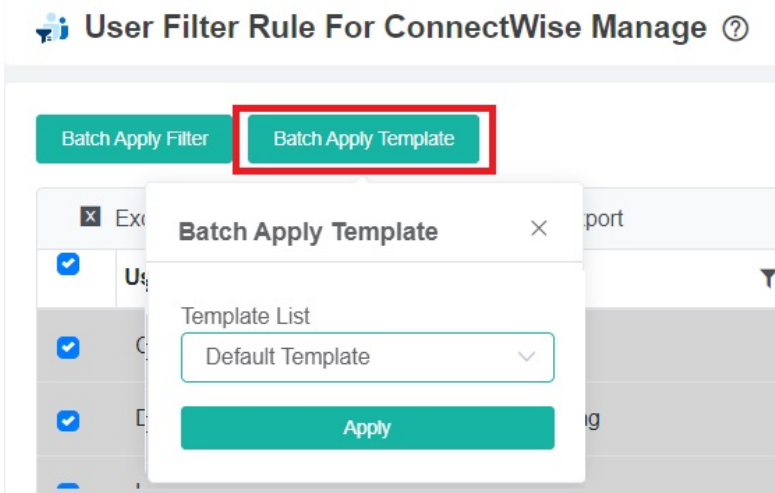
How to apply a template to a batch of technicians

You can do a batch application of a template for a group of technicians that will work on the same NextTicket Template.

- Follow [Steps 1 and 2](#) in the previous section.
- On the User Filter Rule tab, tick the boxes corresponding to the technicians that will work on the same template. To select all technicians, tick the box beside the **User Name** column label.

The screenshot shows the 'User Filter Rule For ConnectWise Manage' interface. The table has columns: User Name, Real Name, Manager, Job Title, Default Next Ticket Filter, and Default Next Ticket Template. The first row shows John Doo as a Testing Engineer, managed by Susan Baker. The 'Default Next Ticket Template' column for John Doo is highlighted with a red box, showing a dropdown menu with 'Default Template' selected. The 'Default Next Ticket Filter' column for John Doo is also highlighted with a red box, showing a dropdown menu with 'Reactive Service' selected.

3. Click the **Batch Apply Template** button, select a template from the dropdown list, and click **Apply**.



This action will apply the selected default template to the selected technicians.

