## How to Clone a Scorecard

The Scorecard Dashboards section of the MSPbots app is where you can identify targets for individuals or teams and see how they score against these targets. To ensure that your scorecards are consistent among team members and to save time in recreating the same scorecard for multiple members or teams, you can clone a scorecard and modify the user for each widget.

Here's how you can clone a scorecard:

1. Log in to the MSPbots app, and go to Scorecards. мараюта φ Refer and Earn Client: mspbots.ai Forum KB Help Center Request New Feature 奋 > Daily Total Escalation R 0 88 Weekly 0 :: 7 days generated messages by bots (Bots with escalation) ▦ C Scorecards [" ~ 2. When the Scorecard Dashboards tab opens, search for the dashboard that you want to clone. ∍⇔т≤ Refer and Earn Q Client: mspbots.ai Forum KB Help Center Request New Feature Φ

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3. Click the ellipsis \*\*\* button on the right side then click Clone.

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- 4. When the Clone pop-up appears, tick the checkbox for Clone the Associated Widgets. You can also review and modify the following as needed:

  - Name Give the scorecard a new name.
    Role Make sure the roles that need access to the scorecard are selected.
    Description Enter your scorecard's description here.

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5. Click Continue. This will open the cloned scorecard.

6.	When the tab of the	cloned s	scorecard opens, g	jo to	the right side of	the so	ree	n and c	lick the Show	Scorecar	d icon.
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7. Hover over the upper-right corner of the scorecard, click the ellipsis ···· button, and select Edit.

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8. Next, go to Dataset on the Widget Builder window, click on the ellipsis \*\*\* button, and select Edit.



<b>(i)</b> 1	Data Source	2	Preview	
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If you have more layers of data, repeat this and the next steps for all the layers.

9. On the Dataset window that opens, find the real\_name filter and type or select the name of the team member.

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## 10. Click Save.

11. Next, go to **Config** and select a **User**.

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12. Then select a Refresh Cron option to set how often you want the scorecard to generate a snapshot.



- Click Save and click Apply.
   Repeat Steps 7 and onward for every widget that needs to be modified.