

# NextTicket Manager for Halo

The **NextTicket Manager** is an automated ticket dispatch system that helps technicians and dispatchers identify the ticket that will be worked on next based on a combination of a pre-defined scoring system and rules. The **NextTicket Manager for Halo** is specifically designed for HaloPSA users who want to achieve more efficient ticket prioritization and management. For more information on NextTicket and how it works, read the article [What is NextTicket Manager?](#)

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## 1. Why should I use the NextTicket Manager for Halo?

The NextTicket Manager for Halo has the following benefits for your MSP:

- Automatic and unbiased ticket dispatching - Tickets are automatically dispatched based on a point system and priority rules. This ensures that dispatchers and technicians assign and work on tickets objectively, according to approved priority, importance, and time criticality.
- Prioritization based on company requirements - The priority rules and point system that define NextTicket prioritization are based on the priorities, importance, and criticality approved by the company. This improves the speed and accuracy of ticket assignment and prioritization remarkably. As a dispatcher, you save 80% of your time allotted for assigning tickets and see the highest ticket priority for each technician based on their skill set.
- Quick identification of next tickets - As a technician, you can quickly identify the tickets you should work on next and monitor tickets scheduled for the day on the same page. You can also reject a ticket if you cannot work on it yet as long as you provide a valid reason for rejection.

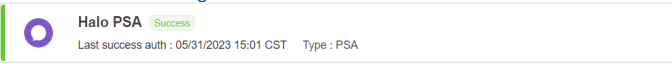
## 2. How can I access NextTicket Manager for Halo?

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

1. log in to the [MSPbots app](#).
2. Click **Apps** in the left pane.
3. When the **Apps** tab opens, click **NextTicket for Halo**.

## 3. Prerequisites

Ensure that you have the following before using the NextTicket Manager for Halo:

- A successful [Halo integration](#) with MSPbots
- 
- Your technicians and dispatchers are in the company's active directory
  - Admin permissions for setting up the filters, points system, and priority rules
  - [Priority Rules](#) are set up.
  - Optional: Companies have been added to the [Watch List](#).

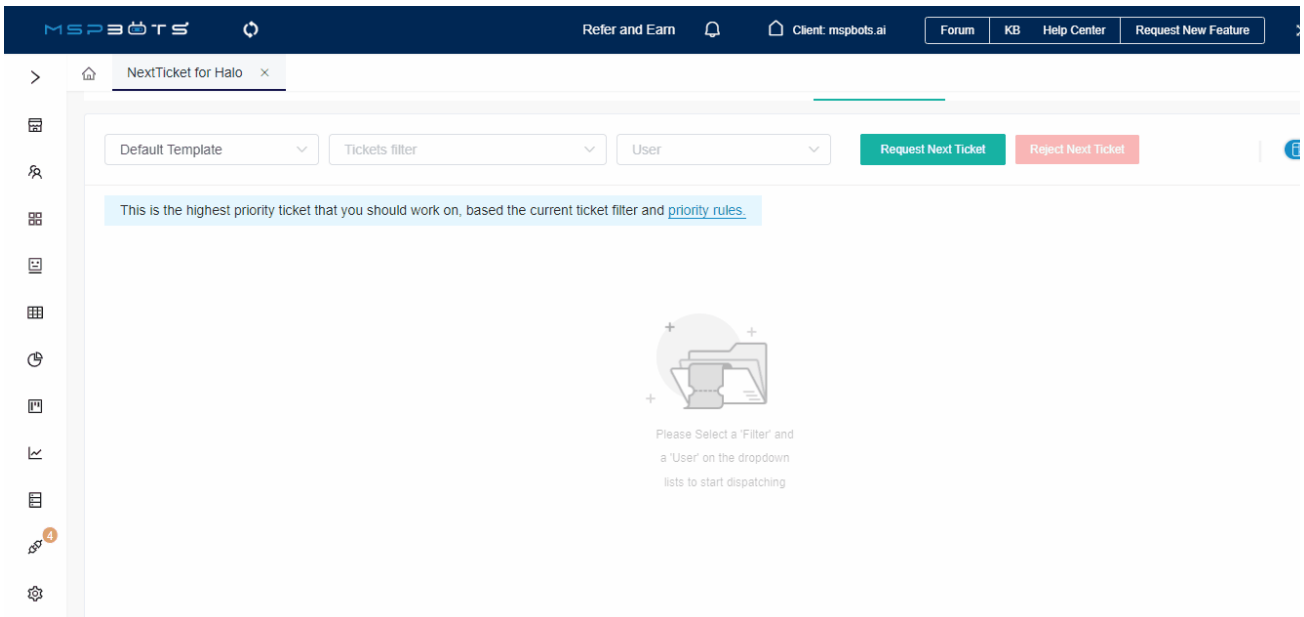
## 4. FOR ADMINS: Setup Procedure

*Only Admin users have permission to adjust the settings for the NextTicket app.*

### 4.1. Set the ticket filter

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

To set the ticket filter, follow these steps:






1. On the NextTicket for Halo screen, select the **Tickets filter** list, and then click **Add New Filter**.
2. When the Filter Settings window opens, enter a name for your filter in the **Filter Name** box.
3. Next, add a condition for your filter by selecting the appropriate filter type from the **Select Fields** list.
4. To complete your condition, enter additional details in the two new fields or lists that appear beside the **Select Fields** dropdown.
5. When you're done setting up the filter, click **Save**.

If you want to add more groups or conditions for the filter, click  and then select either **Add Group** or **Add Condition**.

Filter Settings ×

Filter Name

AND
OR



 Add Condition
=
Customer updated




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To see a preview of the new filter settings or conditions and check if these work as expected, click **Preview** before you save the changes.

Filter Settings ×

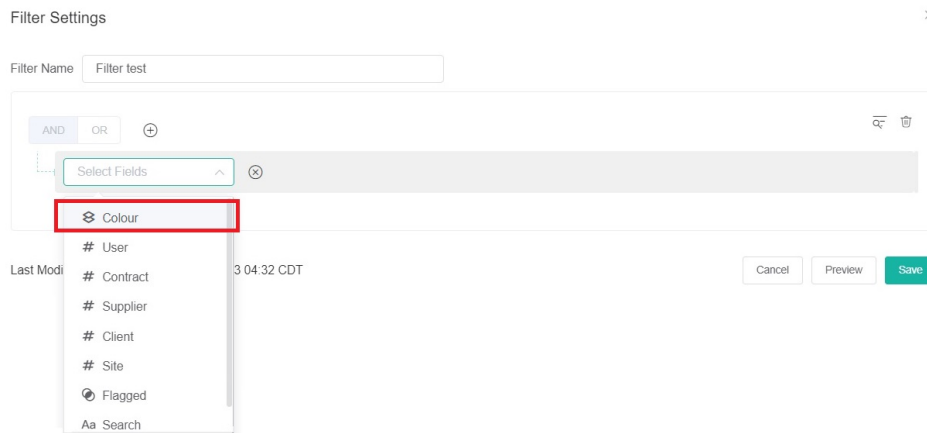
Filter Name

AND
OR


 Add Condition
=
Customer updated


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You can also set a color filter by selecting **Colour** from the filter list.

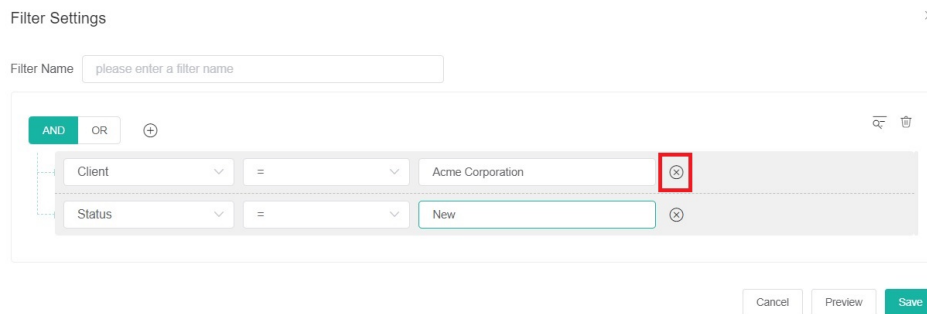



For more information on NextTicket filters, read the article [How to Setup Filters for NextTicket Manager](#).

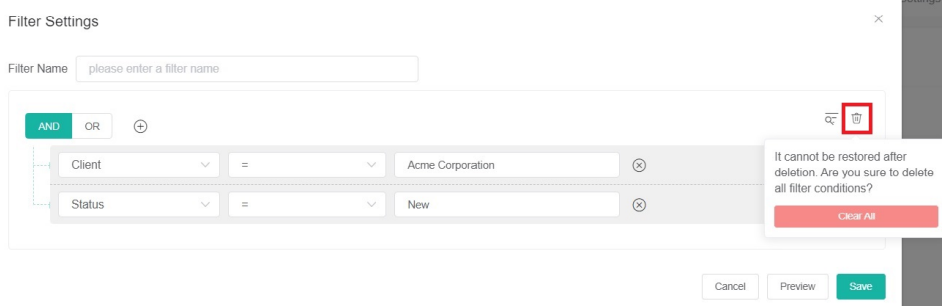
## 4.2. Delete filter conditions

Filter conditions are deleted in the Filter Settings window.

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



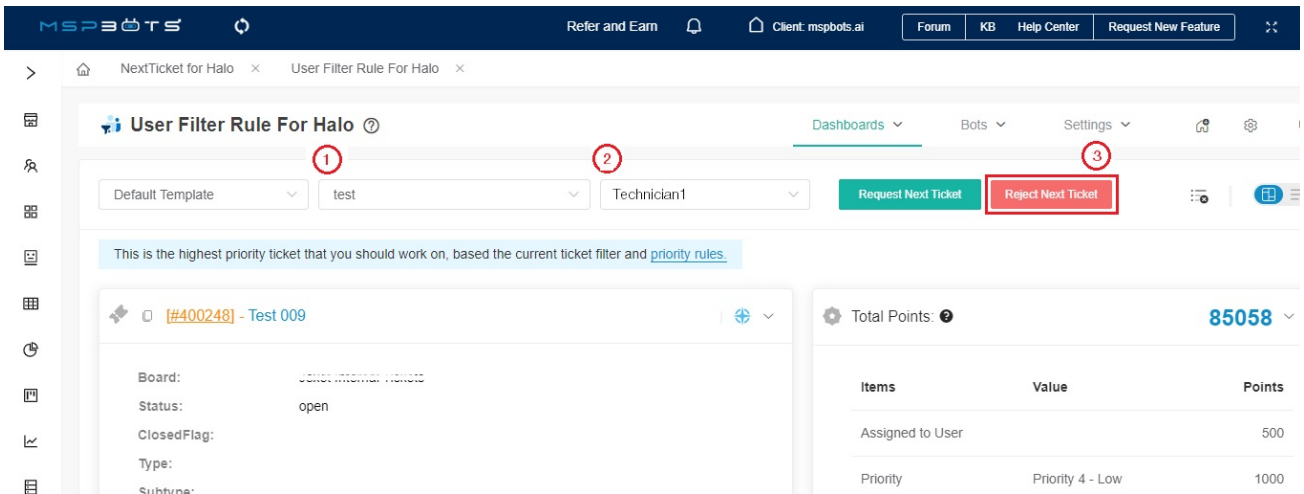
- To delete all filter conditions at once, click  and then click **Clear All**.



## 4.3. Reject the top-priority ticket of a user

The next priority ticket and its details appear after you select a filter and a user on the NextTicket for Halo 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 Halo 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 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**.

Reject Ticket
×

Why are you rejecting this ticket?

Select a reason below or input a new one

Cancel
Save

## 5. FOR ADMINS: Set up the point system for priority rules

You can define the point system for the NextTicket for Halo priority rules to calibrate the prioritization of the tickets.

### 5.1. How to set up the point system

1. Click **Settings** on the NextTicket for Halo screen, and select **NextTicket For Halo Priority Rules**.
2. Go to the **Tickets filter** and **User** fields and select the options that apply to your requirements.
3. Next, set up the priority rules.
  - a. Select a ticket priority type from the **If ticket priority =** field.
  - b. Select a ticket status from the **and ticket status in** field.
  - c. Then in the **add points** field, enter the number of points that will be given to tickets that meet the condition selected in Steps 3a and 3b.

NextTicket For Halo Priority Rules
Load Default All
Test All
Save
Request New Rule







Priority Point rules
Default Template
Filter test
User
Advanced Rule

Assigned And Status
Set how many points to be added on a ticket depending on its agent and ticket status
If ticket agents = 2nd Line Support | Patricia Jones and ticket status in Approved add 1000 points.
If ticket agents = 1st Line Support | Amir Said and ticket status Not In Closed add 1000 points.
Client in "Watch List"
Indicate the points to be added if a client is in the watch list
If the ticket is from a Client that's in your "Watch List", add 1000 points.
Priority And Status
Set how many points to be added on a ticket depending on its priority type and ticket status
If ticket priority = and ticket status in add 1000 points.
Ticket Age
Add corresponding points to a ticket for every min/hour/day elapsed from creation date
For every Day since ticket creation date, add 10 points.
Ticket Summary
Identify a keyword that might be in the ticket summary and add corresponding points if it is present

To set advanced rules, see the section on [How to add an advanced rule](#) below.

You can refer to the section on the [priority rules and functions](#) below to know which rules meet your requirements. The rows of priority rules are expanded by default. You can click the **Priority Point rules** switch to collapse all rows.

4. After setting up each priority rule, you can click do any of the following:

- Click  in front of the rule to enable the rule.
- Click  the **Load Default** button to load the default value for the rule.
- Click  the **Edit** button to configure advanced rules. Only advanced rules can be edited.
- Click  the **Save & Test** button to save the changes for the specific priority rule and to test the values of the rule.
- Click  the **Save** button to save the changes for the specific priority rule.
- Click  the **Delete** button to delete the rule.

5. After setting up all your preferred priority rules, do any of the following:

- Click **Test All** to test the calculation result for all the priority rules.
- Click **Load Default All** to load the default values for all the priority rules.
- Click **Save** and select **Save All** to save the changes for all the priority rules.
- Click **Save** and select **Save Rule as Template** to save the changes for all the priority rules as a template. In the **Save Rule as Template** window, set the **Template Name** and click **Save**.

## 5.2. Best Practices in setting the priority rules

1. Interview your dispatcher or technician to identify rules and conditions like this: If (*given scenario*), then it should be given more (or less) importance.
2. Review each of the point rules you have identified. Use the **Save & Test** function to test each rule.
3. Use the **Test all** function to balance the points between the rules and check if the prioritization brings up your expected result.
4. Ask your technicians to give the app a try and give you feedback.
5. Adjust the rules and points based on the dispatcher's or technicians' feedback.
6. Continue updating the rules and corresponding priority points for two weeks. The resulting prioritization should improve over time and you won't need to modify anymore.
7. Request and create new rules that are not similar or duplicates of existing ones.

## 5.3. What are the NextTicket priority rules and functions?

Below are the priority rules and descriptions of how each rule functions. For information on how to activate, test, save, delete, and request priority rules, read the article [NextTicket Manager Priority Rules](#).

Priority Rule	Function
Assigned And Status	Indicate the points to be added to a ticket based on its current status and the person to whom it is assigned.
Client in "Watch List"	Indicate the points to be added to a ticket if a client is on the watch list.
Priority And Status	Indicate the points to be added to a ticket based on a specific priority level.
Ticket Age	Indicate the points to be added to a ticket based on how long it has been open or unresolved.
Ticket Summary	Indicate the points to be added to a ticket if the ticket summary contains the specified keywords.  You can capture blockers that prevent your clients to continue their operations easily or sort tickets based on specific topics which may be assigned to technicians with great expertise in those areas.
Time of Last Update	Indicate the points to be added to a ticket for every hour past the time that it was last updated.

### Related Topics

- [Configuring NextTicket Priority Rules According to Requirements](#)
- [Assigned User Due Date Priority Rule for NextTicket](#)

## 5.4. How to add an advanced rule

1. Go to **Priority Rules** by clicking the [priority rules](#) link on the **NextTicket for Halo** screen.

2. Click the **Advanced Rule** button to open the Advanced Rule pop-up window.

The screenshot shows the 'NextTicket For Halo Priority Rules' interface. At the top, there are tabs for 'Priority Point rules', 'Max # of tickets:', 'Default Template', 'test2', and 'Carl Zhang'. A red box highlights the 'Advanced Rule' button in the top right corner. Below the tabs, there are several rule configurations, each with a toggle switch and a description. The first rule is 'Assigned And Status', the second is 'Client in "Watch List"', the third is 'Priority And Status', and the fourth is 'Ticket Age'. Each rule has a set of conditions and an action to add or subtract points.

3. Fill in the following fields for adding an advanced rule

The screenshot shows the 'Advanced Rule' pop-up window. It has a title bar with a close button. The 'Rule Name' field is filled with 'Test Advanced Rule'. The 'Rule Description' field is empty. The 'Rule' field contains a complex condition: 'client\_status = Allowed AND request\_user = Current User AND agent\_id != ALL | Unassigned'. The 'Add' field is filled with '1000' and 'Point'. At the bottom, there are 'Cancel' and 'Save' buttons.


- **Rule Name** - Enter a unique rule name.
- **Rule Description** - Enter a description for the rule. (Optional)
- **Rule** - Create conditions for the advanced rule. Add more groups or conditions if you need to.

4. Add positive points to increase prioritization, or give negative points to decrease the priority.

The screenshot shows the 'Advanced Rule' pop-up window. It has a title bar with a close button. The 'Rule' field contains a complex condition: 'request\_user = Current User AND agent\_id != ALL | Unassigned'. The 'Add' field is filled with '1000' and 'Point'. At the bottom, there are 'Cancel' and 'Save' buttons.

5. Click **Save** to keep the settings.

You can also do the following actions in this section:

- **Test the advanced rule** - Click the  icon to save the priority rule and test the values of the rule. Below is an example of the **Test Result** window.

Test Result:

Excel Export PDF Export CSV Export

Columns

Id	Summary	Pts	clientinfo_stopped	requestUser	agent_id	Test Adv
2213	test33333	1000	0	Sg	Aid	1000

1

100

Items per page

1 of 1 pages (1 item)

- **Delete the rule** - Click the  icon to delete the rule.

Advanced Rule

\* Rule Name:

Test Advanced Rule

Rule Description:

\* Rule:

AND OR +

client\_status

=

Allowed

×

AND OR + ×

request\_user

IN

Current User

×

agent\_id

!=

ALL | Unassigned

×

It cannot be restored after deletion. Are you sure to delete all filter conditions?

Clear All

Add

1000

Point

Cancel

Save

- **Use the Colour filter when creating an advanced rule**

You can also create an advanced rule that applies the Colour filter. For example, if companies are grouped according to color, you can add an advanced rule that will add (or deduct) priority points to companies assigned with the specified color. To do this, select **Customer** > **Colour** > **IN** and select the appropriate color.

Company Color (test)

Add points to companies with the indicated color group

AND OR +

Customer / Colour

IN

#58bxc0

+

Add

1000

Point

Cancel

Save

Ticket

Customer

Next Ticket Requestor

# Account Status

# Colour

# Customer

Is Important Contact

Is VIP

# Type

## 6. FOR ADMINS: Add companies to the watch list

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By adding companies to your watch list, you can give additional points to the tickets from specific companies to increase priority.

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

1. Go to the **NextTicket for Halo** screen, click **Settings> Watch List**.
2. When the Watch List tab opens, click **Add Company**.
3. In the Add Company window, select the check box for the companies you want to add.
4. If you want to show and select only companies with an agreement, select the checkbox for **Only show companies have an agreement**. Type the reason for adding the selected companies in the **Why add to the watch list?** field.
5. Click **Save** when done adding.

For more information on using the Watch List, read the article [How to use the Watch List in NextTicket Manager](#).

## 7. FOR TECHNICIANS: How to use the NextTicket Manager

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### 7.1. Viewing your top-priority ticket

As a technician, your next top-priority ticket is shown on the **NextTicket for Halo** screen where you can also request or reject the next ticket assigned to you.

To view your top-priority ticket:

1. Go to the **NextTicket for Halo** screen and select a filter from the **Tickets filter** list. The screen automatically refreshes and shows the details of your next top-priority ticket.
2. Select either **Dashboard View** or **List View** to view the ticket details according to your preference.

### 7.2. Rejecting your top-priority ticket

You can reject your next top-priority ticket if you think that it should not be your next ticket. It is also necessary to specify the reason why you can't work on the ticket.

To reject your top-priority ticket:

1. Go to the **NextTicket for Halo** screen and 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**.

For more information on how to use NextTicket, read the article [What is NextTicket Manager?](#)