

# How to Create an Advanced Rule for NextTicket Manager

This article introduces how to configure the **Advanced Rule** function of NextTicket Manager, including operations such as adding rules and cloning conditions.

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## Background Information

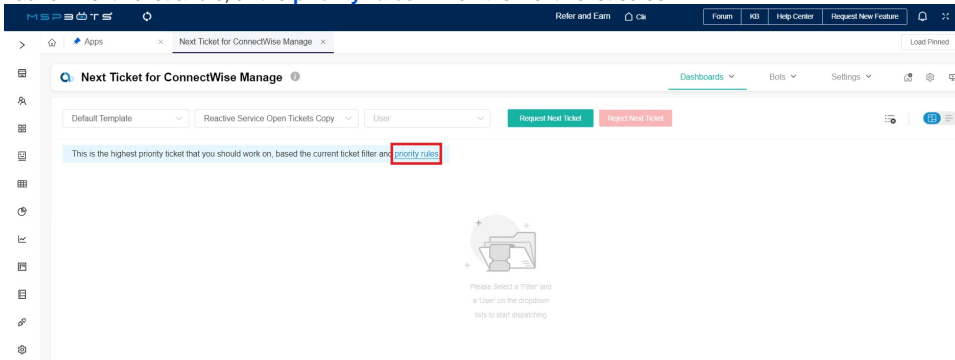
The Advanced Rule feature enables the creation of custom rules when the pre-set priority rules do not meet business requirements. Use this feature when you want to create and add a new priority rule on your own.

## Prerequisites

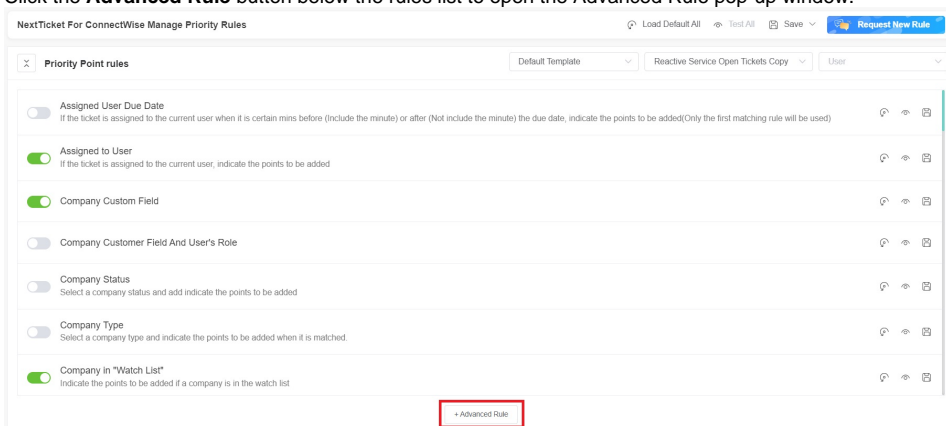
This feature is available to NextTicket Manager for integrations with ConnectWise Manage, Autotask, or Halo integration. Only users with the admin role can create advanced rules.

## How to Add an Advanced Rule

1. Launch NextTicket and click the [priority rules](#) link on the NextTicket screen.



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

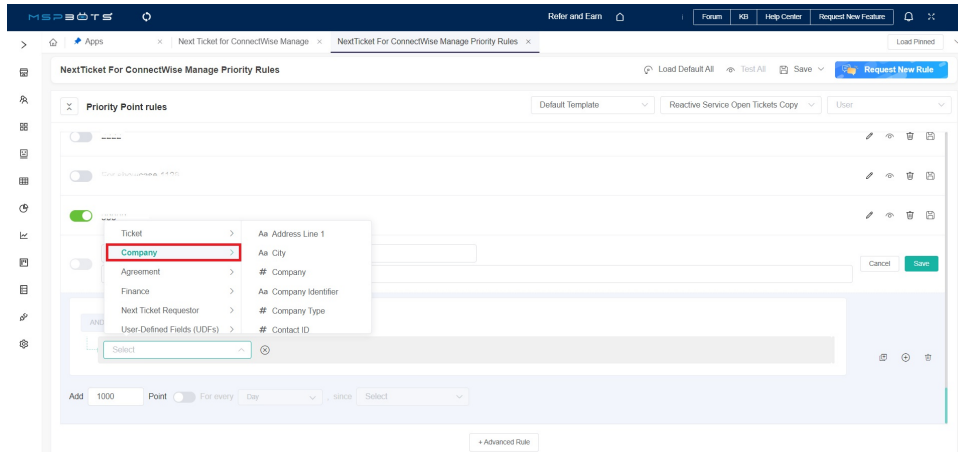


3. Fill in the following fields for adding an advanced rule:
  - a. **Rule Name** - Enter a unique rule name.
  - b. **Rule Description** - Enter a description for the rule. (Optional)
  - c. **Rule** - Create conditions for the advanced rule. Add more groups or conditions if you need to.

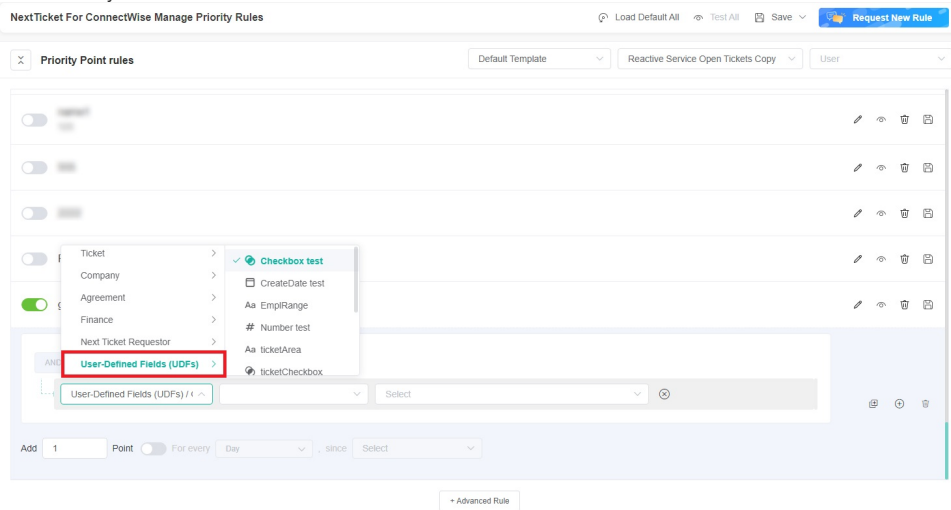
## Creating Advanced Rule conditions for the NextTicket Manager for ConnectWise Manage



When configuring advanced rules, you can select **Company** as a condition and select a filter from the options that appear. Using the Company condition allows you to adjust ticket prioritization by adding or subtracting ticket points based on different company types.

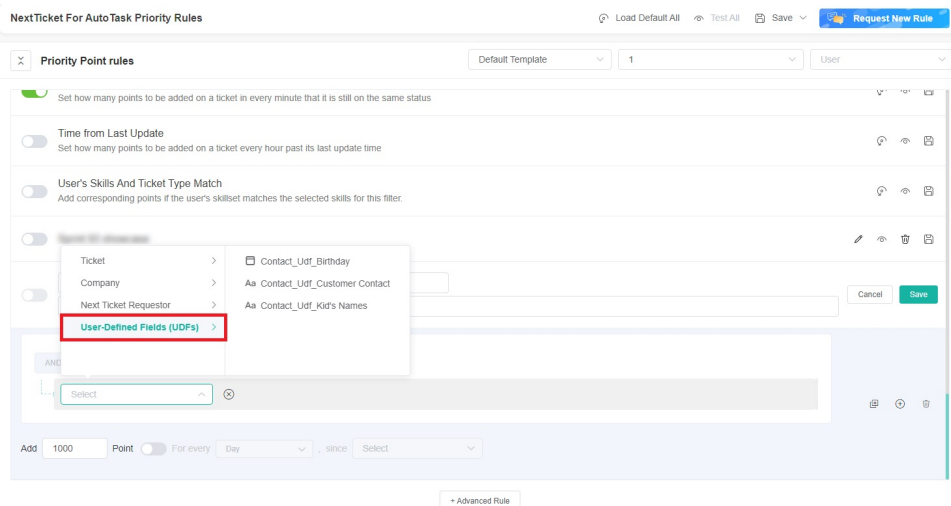



The **User-Defined Fields (UDFs)** feature provides more flexibility when configuring advanced rules by giving the option to select from pre-configured custom fields. Modifications to these custom fields in the ConnectWise are synchronized every hour with MSPbots and automatically reflected in the condition field list of the advanced rules.




## Creating Advanced Rule conditions for the NextTicket Manager for AutoTask


You can also select pre-configured custom fields in the **User-Defined Fields (UDFs)** feature like custom fields from the contact modules. Modifications to custom fields in the AutoTask UDF feature are synchronized with MSPbots every five hours and automatically reflected in the condition field list of the advanced rules.






- If you want to duplicate a specific condition within the new advanced rule, click the **Clone**  icon. This will copy the corresponding condition and its associated score, placing it as a new condition under the existing rule. You can then modify the value and score of this new condition as needed. This simplifies the process of setting up similar conditions.

☒ Advanced rule


AND OR 

Ticket / Status Not IN Projects | Client Response Past Due  1

Add 1000 Point ☒ For every Day since Ticket / Last Updated


  

To add an empty condition, click the **Add**  icon and then configure the condition as needed.

To delete the condition, click the **Delete**  icon.


- Click **Save** to keep the settings.
- Select the toggle switch for the new advanced rule to enable (or disable) it.


☒ Advanced rule

## How to Configure an Existing Advanced Rule

Follow this guide if you want to configure an existing advanced rule:

- Click the **Edit**  icon to change the name and description of the rule.

NextTicket For Halo Priority Rules Load Default All Test All Save 

Priority Point rules Default Template Filter test User


☐ Priority And Status Set how many points to be added on a ticket depending on its priority type and ticket status


☐ Ticket Age Add corresponding points to a ticket for every min/hour/day elapsed from creation date.

☐ Ticket Summary Identify a keyword that might be in the ticket summary and add corresponding points if it is present





☐ Time of Last Update Set how many points to be added on a ticket every hour past its last update time


☐ Test


AND OR 

Select Fields 

Add 1000 Point ☒ For every Day since Select




- Click the **Save & Test this rule**  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

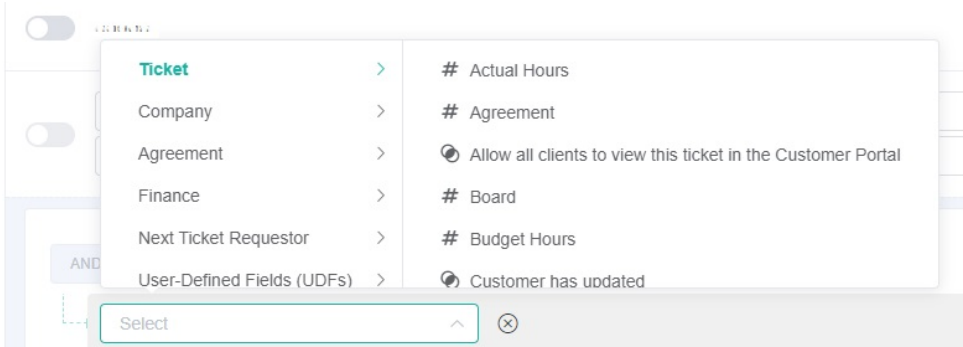
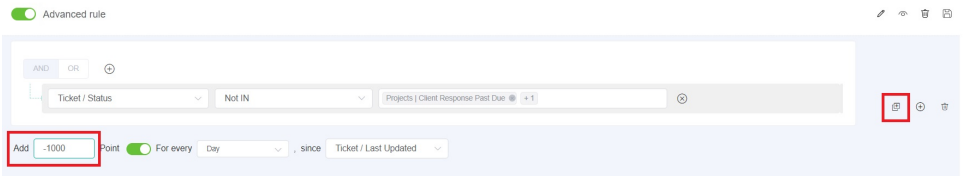
1 of 1 pages (1 item)

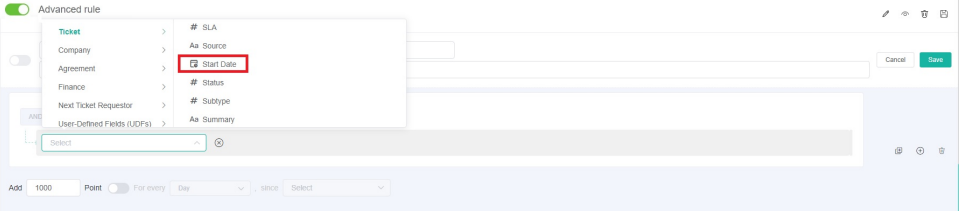
Click the **Delete**  icon if you want to delete the advanced rule,

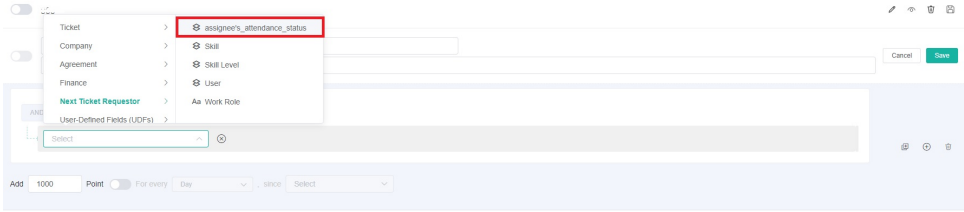
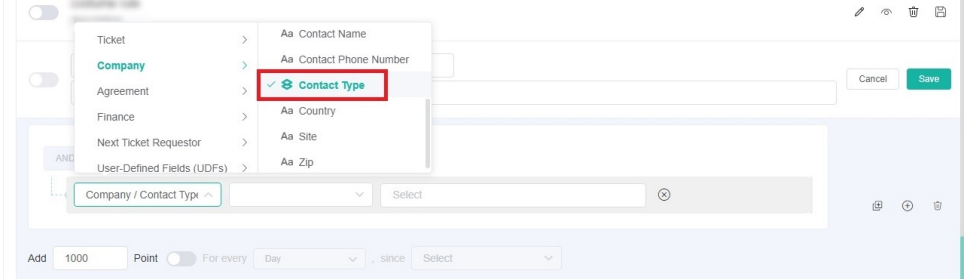
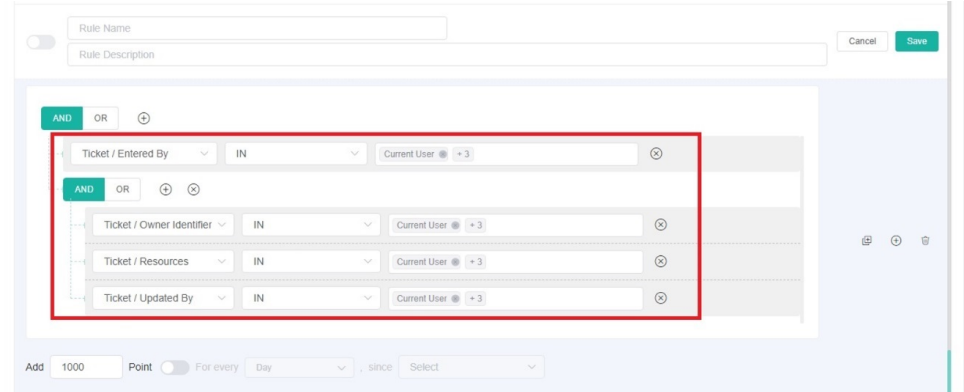
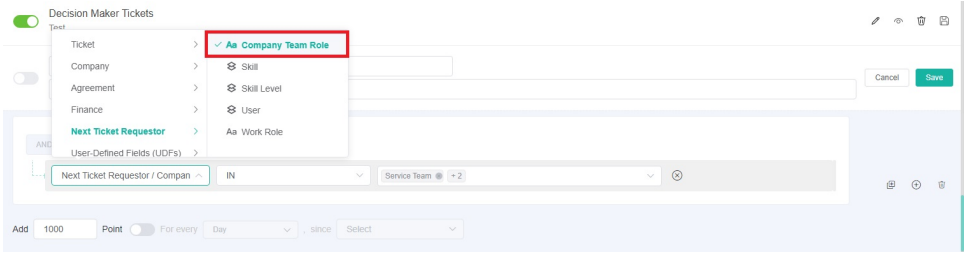
Don't forget to click the **Save**  icon to save your configuration.

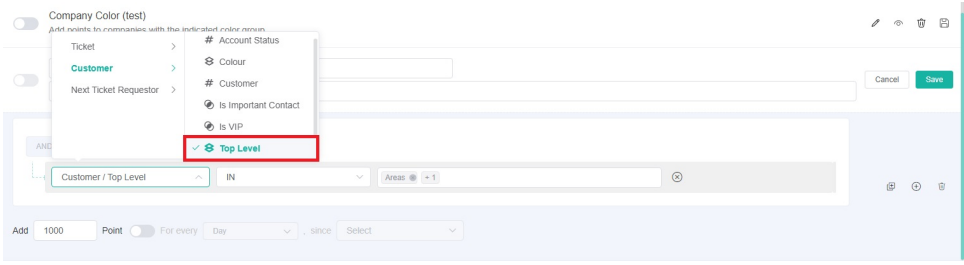
If using this feature does not meet your new rule requirement, [file a new feature request](#) or email [support@mspbots.ai](mailto:support@mspbots.ai) for assistance.

What other fields are available in the Advanced Rule?

No.	Field Name	Description
1	Cascading options for the dropdown fields	<p>The options in the dropdown fields are arranged into categories Ticket, Company, Agreement, Finance, Next Ticket Requestor, and User-Defined Fields (UDFs) for easier browsing and selection of filters. Users can select a category and then select an option under that category. The categories are used for searching for a filter.</p> 
2	Support for positive and negative points	<p>The Advanced Rule feature supports positive and negative points. Enter a whole number or a negative value in the <b>Add</b> field to increase or decrease the ticket's priority.</p> 

3	<b>Assign points based on time intervals</b>	<p>If you want to ensure prompt handling of tickets that meet advanced priority rules, you can activate the <b>For every</b> switch that allows you based on time intervals. This helps improve the efficiency of ticket processing and prevents tickets that have not been worked on from increasing their priority. You can configure the conditions for scoring based on time intervals to ensure that tickets are prioritized appropriately.</p>  <p>For tickets that meet the advanced rule, points will be added starting from the following date conditions, and incrementally based on each or <b>Business Day</b> to elevate their priority.</p> <ul style="list-style-type: none"> <li>• NextTicket for ConnectWise Manage <ul style="list-style-type: none"> <li>◦ <b>required_date</b> - The date when the ticket is required</li> <li>◦ <b>estimated_start_date</b> - The estimated start date for the ticket</li> <li>◦ <b>last_updated</b> - The date when the ticket was last updated</li> <li>◦ <b>date_entered</b> - The date when the ticket was entered</li> <li>◦ <b>start_date</b> - The date when the technician started working on the ticket</li> </ul> </li> <li>• NextTicket for Autotask <ul style="list-style-type: none"> <li>◦ <b>completedDate</b> - The date when the ticket was completed</li> <li>◦ <b>createDate</b> - The date when the ticket was created</li> <li>◦ <b>dueDateTime</b> - The deadline for the ticket</li> <li>◦ <b>firstResponseDateTime</b> - The date and time of the first response to the ticket</li> <li>◦ <b>firstResponseDueDateTime</b> - The deadline for the first response to the ticket</li> <li>◦ <b>lastActivityDate</b> - The date of the last activity on the ticket</li> <li>◦ <b>lastCustomerNotificationDateTime</b> - The date and time of the last notification sent to the customer</li> <li>◦ <b>lastCustomerVisibleActivityDateTime</b> - The date and time of the last customer-visible activity</li> <li>◦ <b>lastTrackedModificationDateTime</b> - The date and time of the last tracked modification</li> <li>◦ <b>resolutionPlanDateTime</b> - The date and time of the resolution plan was created</li> <li>◦ <b>resolutionPlanDueDateTime</b> - The deadline for the resolution plan</li> <li>◦ <b>resolvedDateTime</b> - The date and time when the ticket was resolved</li> <li>◦ <b>resolvedDueDateTime</b> - The deadline for resolving the ticket</li> </ul> </li> <li>• NextTicket for Halo <ul style="list-style-type: none"> <li>◦ <b>date_assigned</b> - The date when the ticket was assigned</li> <li>◦ <b>date_occurred</b> - The date when the ticket occurred</li> <li>◦ <b>deadline_date</b> - The deadline date for the ticket.</li> <li>◦ <b>fix_by_date</b> - The date when the ticket is fixed.</li> <li>◦ <b>last_action_date</b> - The date of the last action on the ticket.</li> <li>◦ <b>last_incoming_email</b> - The date of the last incoming email related to the ticket.</li> <li>◦ <b>respondby_date</b> - The date when the ticket was responded to</li> <li>◦ <b>start_date</b> - The date when the ticket starts</li> <li>◦ <b>target_date</b> - The target date for the ticket</li> </ul> </li> </ul>
4	<b>Less prioritization for tickets with a start date set in the future</b>	<p>The Advanced Rule has the new field <b>Start Date</b> field which enables you to add negative points to tickets with a start date set in the future search for an option in this field.</p> 
5	<b>Time variable</b>	<p>You can give priority to tickets that fall under the selected specific times. For example, select tickets that start in the <b>Next 24 hours</b>.</p> 

6	<b>Assignee's Attendance Status variable</b>	<p>Previously available in NextTicket for Autotask only, the Assignee's Attendance Status variable is now also included in the advanced rule for ConnectWise Manage and NextTicket for Halo. This variable factors the assignee's attendance status into ticket prioritization.</p> 
7	<b>Contact Type</b>	<p>Only available in the advanced rules of <b>NextTicket for ConnectWise Manage</b>. This conditional field already exists in the preset priority under the <b>Company</b> category.</p> <p>By customizing the contact type field, you can ensure that tickets are assigned to the appropriate personnel or departments based on the contact, thereby creating more accurate and efficient ticket priority strategies.</p> 
8	<b>Current User</b>	<p>Only available in the advanced rules of <b>NextTicket for ConnectWise Manage</b>. If you choose any of the following conditions under the <b>Resources/Owner Identifier/Updated By/Entered By</b>, you can select <b>Current User</b> as an option and also choose multiple users.</p> <p>The addition of the <b>Current User</b> field means that when the current user meets this condition, it will trigger the advanced priority rule and</p> 
9	<b>Company Team Role</b>	<ul style="list-style-type: none"><li>Only available in the advanced rules of <b>NextTicket for ConnectWise Manage</b>.</li><li>This field is an option in the ConnectWise app, and here it is used to retrieve the values of Company Team Role from the ConnectWise app.</li><li>You can select this option in the "Next Ticket Requestor" category and choose one or more values from the dropdown list to configure specifically for this field. It will filter out your top priority ticket.</li></ul> 

10	<b>Top Level</b>	<ul style="list-style-type: none"> <li>• Only available in the advanced rules of <b>NextTicket for Halo</b>.</li> <li>• This field is a default field in the Halo app and its purpose is to fetch top levels from Halo.</li> <li>• You can select this option in the "Customer" category and select one or more top levels from the dropdown list to configure advanced rules. It will filter out your top priority ticket.</li> </ul>  <p>The screenshot shows a configuration window for a rule. On the left, there are toggle switches for 'Company Color (test)' and 'Next Ticket Requestor'. A dropdown menu is open, showing a list of categories: 'Ticket', 'Customer', and 'Next Ticket Requestor'. Under the 'Customer' category, several options are listed: 'Account Status', 'Colour', 'Customer', 'Is Important Contact', 'Is VIP', and 'Top Level'. The 'Top Level' option is highlighted with a red box and a green checkmark. Below the dropdown, there is a text input field containing 'Customer / Top Level'. At the bottom of the window, there are fields for 'Add 1000', 'Point', 'For every', 'Day', 'since', and 'Select'.</p>
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## Related Topics

- [NextTicket Manager Priority Rules](#)
- [Setting Up the Point System for NextTicket Priority Rules](#)
- [Configuring NextTicket Priority Rules According to Requirements](#)
- [Assigned User Due Date Priority Rule for NextTicket](#)