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.

What's on this page:

- Background Information
- Prerequisites
- How to Add an Advanced Rule
 - Creating Advanced Rule conditions for the NextTicket Manager for ConnectWise Manage
 Creating Advanced Rule conditions for the NextTicket Manager for AutoTask
- How to Configure an Existing Advanced Rule
- What other fields are available in the Advanced Rule?
- Related Topics

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 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

MS	spacers o	Refer and Ea	m () Cak	Forum K	B Help Center	Request New Fe	ature	ļΦ
>								Load Pir
8	Next Ticket for ConnectWise Manage			Dashboards ~	Bots 🛩	Settings 👻	G	3 ©
R							_	
88	Default Template V Reactive Service Open Tickets Copy V User	 Request Next Ticket 	Reject Next Ticket				:0	Œ
-	This is the highest priority ticket that you should work on, based the current ticket filter and priority rules.							
#								
œ		+ +						
₩								
e	+	Pase Select a 'Filter' and						
s								
٥								
© lick	the Advanced Rule button below the rules list to	o open the Adv	vanced	Rule pop-	up winc	JOW.	st New	v Rule
® lick NextTio	the Advanced Rule button below the rules list to exet For ConnectWise Manage Priority Rules	D open the Adv	vanced © Load D V Rea	Rule pop- efault All & Test All	up winc Save ~ ets Copy ~	JOW. Reque	st New	v Rule
® IICK NextTie X F	the Advanced Rule button below the rules list to cket For ConnectWise Manage Priority Rules Priority Point rules Assigned User Due Date	D open the Adv	Vanced Concerned Concerned Res	Rule pop- efault All @ Test All	up winc Save ~ ets Copy ~	JOW.	st New	v Rule
® lick NextTio	the Advanced Rule button below the rules list to cket For ConnectWise Manage Priority Rules riority Point rules Asigned User Due Date If the toket is assigned to the current user when it is certain mass before (include the minute) or after (Net include to	Default Template	Vanced Concerned Concerned Real The points to be ad	Rule pop- eduati All Test All to Test All to Version Provided Construction	up winc Save ~ ets Copy ~ ing rule will be us	dow. Reque User ed)	<mark>st New</mark> Pे क	v Rule
© NextTid	the Advanced Rule button below the rules list to cket For ConnectWise Manage Priority Rules Priority Point rules Assigned User Due Date Sassigned to Bate Criterit user when it is certain mins before (Include the minute) or after (Net include to Sassigned to User Content user, indicate the points to be added	D open the Adv	Vanced	Rule pop- efault All (* Test All ctive Service Open Tick ded(Only the first match	up winc Save ~ ets Copy ~ ing rule will be us	dow. Reque User	st New P To To	v Rule
Silick NextTid X F	the Advanced Rule button below the rules list to cket For ConnectWise Manage Priority Rules Priority Point rules Assigned User Due Date If the locket is assigned to the current user, indicate the points to be added Company Custom Field	Default Templete	Vanced Cod D Cod D Red The points to be ad	Rule pop- efault All (* Trest All ctive Service Open Tick ded(Only the first match	UD WINC ≥ Save ∨ ats Copy ∨ ing rule will be us	dow.	st New P @ P @	× Rule × B × B
© NextTid	the Advanced Rule button below the rules list to cket For ConnectWise Manage Priority Rules Priority Point rules Assigned User Due Date The ticket is assigned to the current user when it is certain mins before (include the minute) or after (Net include Assigned to User If the ticket is assigned to the current user, indicate the points to be added Company Custom Field Company Customer Field And User's Role	Default Template	Vanced C Load D V Red te points to be ad	Rule pop- eveluti All (* Test All ctive Service Open Tick ded(Only the first match	IP Save Save ing rule will be us	Jow.	st New p q q q q	× Rule × E × E × E × E
Ilick	the Advanced Rule button below the rules list to cet For ConnectWise Manage Priority Rules riority Point rules Assigned User Due Date If the tecket is assigned to the current user when it is certain minis before (include the minute) or after (Net include If the tecket is assigned to the current user, indicate the points to be added Company Customer Field And User's Role Company Customer Field And User's Role Company Status Sector a company Status Co	Default Template	Vanced © Load D V Rec te points to be ad	Rule pop- efault Al The Test All Crive Service Open Tick aded(Only the first match	LD Save > ets Copy > ing rule will be us	Jow. User ed)	t <mark>st Nev</mark> क द क द	v Rule
©	the Advanced Rule button below the rules list to take For ConnectWise Manage Priority Rules rorrity Point rules Assigned User Due Date Assigned to User Due Date Assigned to User Oue Date Company Custom Field Company Custom Field And User's Role Company Custom Field And User's Role Company Status Select a company status and add indicate the points to be added Company Type Select as Company Type Select as Company Type	D open the Adv	Vanced	Rule pop- eduati All (* Test All (trive Service Open Tick ded(Only the first match	In the set of the set	dow.	ער אוני איז איז איז איז איז איז איז איז איז אי	× Rule

- 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. $\ensuremath{\textbf{Rule}}$ 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.

Σ	spadre 🗘	Refer and Earn	۵	Forum KB Help Center Reque	est New Fe	sture	٥	×	
>						L	.oad Pir	ned	\sim
8	NextTicket For ConnectWise Manage Priority Rules			🕝 Load Default All 🛛 Test All 🖺 Save 🗸	🤹 R	equest	New R	tule 🗍	
R	X Priority Point rules	Default Template		✓ Reactive Service Open Tickets Copy ✓ 1	User				
88					0	1	Ū	8	
⊡ ⊞	Consideration And				1	~	Ø	8	
G					1	*	宙	8	
	Ticket > Ae Address Line 1 Company > Aa Otly Agreement > # Company					Cancel	Sa	ne	
⊔ ₽ ©	Hattice Heapsetor Ac Company Identifier Heapsetor # Company Type Use-Defined Fields (UDFs) # Contact ID Setter Setter Setter Setter					œ	÷	-	
	Add 1000 Point Day v since Select v								
	+ Advanced Rule								

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.

Next licket For Connectivise manage Friding Rules	6. Coad Delault All 10. Test All 20 Save 1 All Request New Rule
X Priority Point rules	Default Template
	/ 《 前 图
	1 The State of the
	P ~ 10 B
Ticket Company CreateDate test	1 1 1 2
Augreenical Aa Emplange Finance Finance # Number less Next Ticket Requestor Aa ticketArea Augureenical User-Defined Fields (UDFs) Augureenical Lessenberkowe	/ ~ T B
Add 1 Point Por every Day v, since Select v	 > Ø > Ø
- Adra	nced Rule

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.

Next licket For Auto lask Fridity Rules			Q. Load Deladit All		Request	New R	ule
× Priority Point rules		Default Template	~] [1	 ✓ Use 			
Set how many points to be added on a ticket in every minute that it	s still on the same status				φ.	101	8
Time from Last Update Set how many points to be added on a ticket every hour past its last	update time				P	0	8
User's Skills And Ticket Type Match Add corresponding points if the user's skillset matches the selected	skills for this filter.				Ţ	0	8
					1 0	ŵ	8
Company A Contact_Udf_Cu NextTicket Requestor A Contact_Udf_Cu	tomer Contact				Cancel	Sa	we
AND Select					æ	۲	Ū
Add 1000 Point Por every Day V, s	Select						

+ Advanced Rule

4. 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	/ ~ ê B
AND OR O Tricket / Status V Not IN V Projects (Client Response Plat Due) + 1 O	₽ ⊕ 8
Add 1000 Point C For every Day v , since Ticket / Last Updated v	
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	1 1 1 2
	Advanced rule Image: Control of the condition of the

How to Configure an Existing Advanced Rule

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

.....

extTicket For Halo Priority Rules		P Load Default All @	Test All 🖺 Save 🗸	Request l	lew R
X Priority Point rules	Default Template	 Filter test 	Y Us	er	
Priority And Status Set how many points to be added on a ticket depending on its priority type and ticket status				Ģ	0
Ticket Age Add corresponding points to a licket for every min/houriday elapsed from creation date.				Q	0
Ticket Summary Identify a keyword that might be in the licket summary and add corresponding points if it is present				ତ	0
Time of Last Update Set how many points to be added on a ticket every hour past its last update time				(P)	6
Test				•	Ŵ
AND OR O Setted Fields V O Add 1000 Point For every Day v , since Setted V				æ (Ð

• Click the Save & Test this rule on to save the priority rule and test the values of the rule. Below is an example of the Test Result window.

	т	Summary	Ŧ	Pts	٣	clientInfo_stopped	٢	requestUser	т	agent_id	Ŧ	Test Ad
213		test33333		1000		0		S g		A d		1000

Click the **Delete** $\widehat{\mathbb{U}}$ 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 for assistance.

What other fields are available in the Advanced Rule?

No.	Field Name	Description
1	Cascad ing options for the dropdo wn fields	The options in the dropdown fields are arranged into categories Ticket, Company, Agreement, Finance, Next Ticket Requestor, and Use (UDFs) for easier browsing and selection of filters. Users can select a category and then select an option under that category. The category searching for a filter.
		Ticket > # Actual Hours Company > # Agreement Agreement > • Allow all clients to view this ticket in the Customer Portal Finance > # Board Next Ticket Requestor > # Budget Hours User-Defined Fields (UDFs) > • Customer has updated
2	Suppor t for positiv e and negativ e points	The Advanced Rule feature supports positive and negative points. Enter a whole number or a negative value in the Add field to increase ticket's priority.

3	Assign points based on time intervals	If you want to ensure prompt handling of tickets that meet advanced priority rules, you can activate the For every 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 a reasons. You can configure the conditions for scoring based on time intervals to ensure that tickets are prioritized appropriately.
		Tablet / Status Not N Projects Called Response Pail Date (1.41) Image: Called Response Pa
		Ticket Date Entered Listmate Statu Date Estimate Statu Date AND OR Regards Date
		See:
		 For tickets that meet the advanced rule, points will be added starting from the following date conditions, and incrementally based on eac or Business Day to elevate their priority. NextTicket for ConnectWise Manage
		 Next licker in the date when the ticket is required estimated_start_date - The date when the ticket is required last_updated - The date when the ticket was last updated date_entered - The date when the ticket was completed start_date - The date when the ticket was completed createDate - The date when the ticket was created dueDateTime - The date and time of the first response to the ticket lastActivityDate - The date and time of the first response to the ticket lastActivityDate - The date and time of the first response to the ticket lastActivityDate - The date and time of the first response to the ticket lastActivityDate - The date and time of the last notification sent to the customer lastCustomerVoificationDateTime - The date and time of the last notification sent to the customer lastCustomerVoificationDateTime - The date and time of the last notification resolutionPlanDateTime - The date and time of the resolution plan was created resolutionPlanDueDateTime - The date and time of the resolution plan resolvedDateTime - The date and time when the ticket was resolved resolvedDateTime - The date when the ticket was assigned date_occurred - The date when the ticket was assigned date_occurred - The date when the ticket was resolved to the custor of the last action on the ticket. last_action_date - The date of the last action on the ticket. last_action_date - The date when the ticket was resolved to the size of the last incoming email related to the ticket. resolvedDueDateTime - The date for the ticket. last_action_date - The date of the last action on the ticket. last_action_date - The date when the ticket was resolved to the size of the last incoming email related to the ticket. resolvedDueDateTime - The date action on the ticket. last_action_date - The date when the ticket was resolv
4	Less prioritiz ation	The Advanced Rule has the new field Start Date 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.
	tor tickets with a	Incert incert Company A Source Company Company Plance Image: Company Plance Image: Company Plance Image: Company
	start date set in	NexT Requestor >
	future	Add 1000 Pant Dr Porevery Dr V, shot Select V
5	Time variable	You can give priority to tickets that fall under the selected specific times. For example, select tickets that start in the Next 24 hours.
		Net 24 Select Cancel Som Include this BusinessDay Include this BusinessDay
		Mode Matures Tacket / Start Date Value
		Add 1000 Point For every Days Bit C - C Webles (Mon Sun) Webles (Mon Sun) Webles (Sun Sat) Vebles (Sun Sat) Webles (Sat Fin) + Advanced Rule Weblend

6	Assign ee's	Previously available in NextTicket for Autotask only, the Assignee's Attendance Status val for ConnectWise Manage and NextTicket for Halo. This variable factors the assignee's att	riable is now also included in the advanced rul endance status into ticket prioritization.
	ance	· · · · · · · · · · · · · · · · · · ·	/ ~ tr B
	Status	Ticket > B assigner's attendance_status	
	variabl	Agreement > 8 SkilLevel	Cancel Save
		Next Ticket Requestor > Aa Work Role	
		User-Defined Felds (UDFs) >	
		Add 1000 Point The Forevery Day v , since Select v	
7	Contac t Type	Only available in the advanced rules of NextTicket for ConnectWise Manage . This condunder the Company category. By customizing the contact type field, you can ensure that tickets are assigned to the approximate contact, thereby creating more accurate and efficient ticket priority strategies.	litional field already exists in the preset priority ropriate personnel or departments based on th
		Ticket > Aa Contact Name	
		Company > Aa Contact Phone Number	Cancel Save
		Agreement > 3 Contact type	
		Next Ticket Requestor > Aa Site	
		AND User-Defined Fields (UDFs) > Aa Zip	
		Company / Contact Type A	i e e
		Add 1000 Point For every Day V, since Select V	
		The addition of the Current User field means that when the current user meets this conditions in the Name Rule Description Rule Description Rule Description Rule Of Rule Point	tion, it will trigger the advanced priority rule an
9	Сотра	Add 1000 Ponk Porevery Lay V, since Select V	
	ny Team Role	 Only available in the advanced rules of NextTicket for ConnectWise Manage. This field is an option in the ConnectWise app, and here it is used to retrieve the valu. You can select this option in the "Next Ticket Requestor" category and choose one o specifically for this field. It will filter out your top priority ticket. 	ues of Company Team Role from the Connect r more values from the dropdown list to config
		Decision Maker Tickets Text	/ ~ @ B
		Ticket > A Company Team Role Company > Skill	
		Agreement > 8 Skil Level	Cancel Save
		Finance >> & User	
		All User-Defined Fields (UDFs) >	
		Next Tichtet Requestor / Compan A N V Service Team (+2 V 🛞	@ • ©
		Add 1000 Point Porevery Day V, since Select V	

10	Top Level	 Only available in the advanced rules of NextTicket for Halo. This field is a default field in the Halo app and its purpose is to fetch top levels from Halo. You can select this option in the "Customer" category and select one or more top levels from this field. It will filter out your top priority ticket. 	n the dropdo	own list to configure advanc
		Company Color (test) And relates to companies with the indicated color ennem. Ticket	Cancel Save	
		Add 1000 Point Provery Day v . since Select v	je 🕑 8	

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