

Eureka Process

The Eureka Process in MSPbots is a tool for Managed Service Providers (MSPs) and companies to gain insight into their business and processes. It has real-time gauges and dashboards so you can look into finance and service delivery measurables like accounts receivables, outstanding sales, response time, and vendor analysis.

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What are the advantages of using the Eureka Process app?

With the Eureka Process, you can:

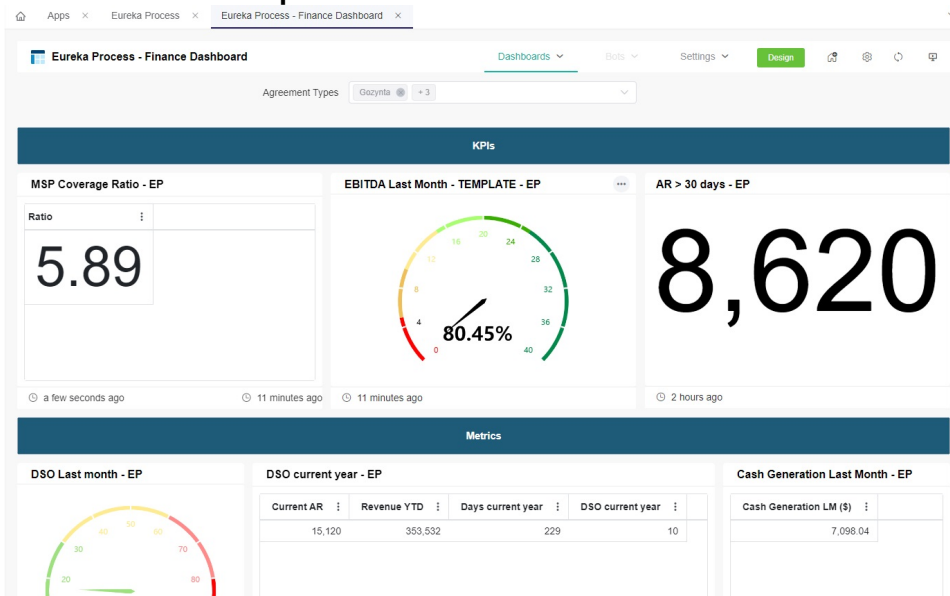
- measure the organization's financial health and service performance
- visualize expenditures and cost patterns; identify cost-saving opportunities
- make data-driven decisions in allocating resources effectively, reducing costs, and increasing overall productivity
- highlight bottlenecks or inefficiencies in the service process and allow prompt corrective action
- monitor your company's EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization)

Who can use this app?

The Eureka Process in MSPbots is available to users of [Autotask](#), [ConnectWise Manage](#), [QuickBooks Online](#), [QuickBooks On-Premise](#), and [Kaseya BMS](#). To use this app, you must first set up your software's connection to MSPbots. Click the hyperlinks to your software for guided instructions on setting up an integration with MSPbots.

What are the Eureka Process dashboards and widgets?

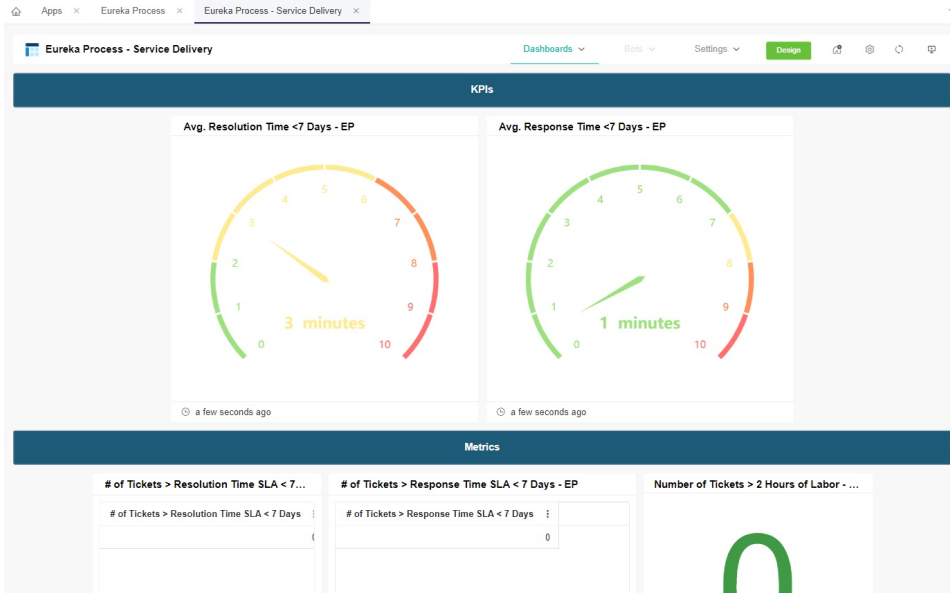
1. Eureka Process Template - Finance Dashboard



This dashboard shows how your company measures against metrics like the EBITDA and daily sales outstanding. The widgets on this dashboard are:

- **MSP Coverage Ratio** - This widget calculates the MSP Coverage Ratio using the formula: $MRR/Expenses$.
- **EBITDA Last Month** - This widget calculates and displays the EBITDA from the previous month.
- **AR > 30 Days** - This widget shows the account receivable from more than 30 days.
- **DSO Last Month** - This widget shows the Days Sales Outstanding from the last month.
- **DSO Current Year** - This widget shows the Days Sales Outstanding for the current year.
- **Cash Generation Last Month** - This widget shows the cash generation for the last month.
- **Vendors Analysis** - This table analyzes the vendors according to the amount in the current month and the average in the last five months, then compares the current to the average in the last five months.

2. Eureka Process Template - Service Delivery Dashboard



This dashboard shows how your company scores on metrics like response and resolution times. The widgets on this dashboard are:

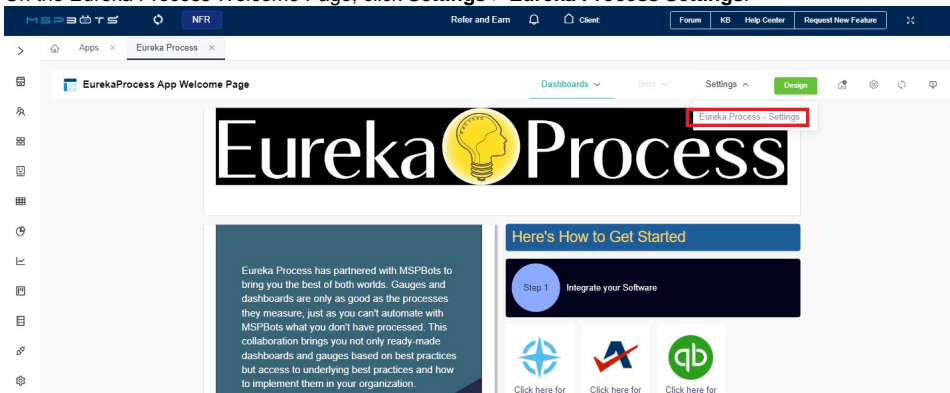
- Avg Resolution Time - This is the average time in resolving a ticket minus the time it was waiting. The average response time is in minutes.
- Avg Response Time - This is the average time in responding to a ticket. The average response time is in minutes.
- Number of tickets greater than resolution time SLA but less than 7 days
- Number of tickets greater than response time SLA but less than 7 days
- Number of tickets with over 2 labor hours spent

Which settings are customizable in the Eureka Process app?

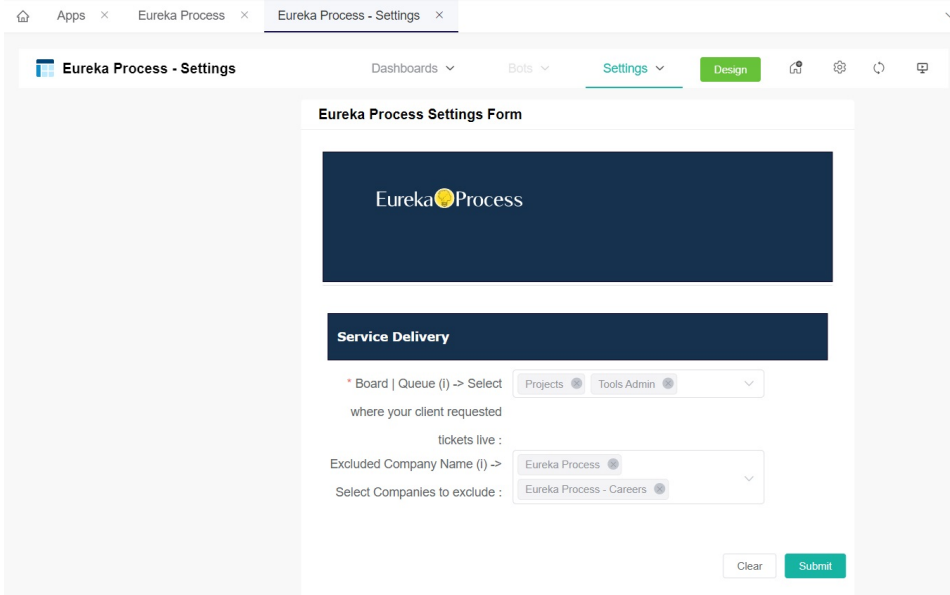
You can include boards and queues and exclude companies from the data shown in the dashboards.

To configure these settings:

1. On the Eureka Process Welcome Page, click **Settings > Eureka Process Settings**.



2. Click the **Board | Queue** dropdown and select the board or queue you want to include in the data.



The screenshot shows the 'Eureka Process - Settings' page. At the top, there are tabs for 'Apps', 'Eureka Process', and 'Eureka Process - Settings'. Below the tabs, there's a navigation bar with 'Dashboards', 'Bots', 'Settings', and 'Design'. The 'Settings' tab is active. The main content area is titled 'Eureka Process Settings Form'. It features a dark blue header with the 'Eureka Process' logo. Below the header, there's a 'Service Delivery' section. This section contains a dropdown menu labeled '* Board | Queue (I) -> Select' with 'Projects' and 'Tools Admin' as options. Below this, it says 'where your client requested'. There's also a 'tickets live :' label. The 'Excluded Company Name (I) ->' dropdown is set to 'Eureka Process'. Below it, 'Select Companies to exclude :' is set to 'Eureka Process - Careers'. At the bottom right, there are 'Clear' and 'Submit' buttons.

3. Click the **Excluded Company Name** dropdown and select the company that needs to be excluded from the data.

4. Click **Submit** when done.