

NextTicket Manager for Kaseya BMS

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 Kaseya BMS** is specifically designed for Kaseya BMS 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?](#)

What's on this page:

1. Why should I use the NextTicket Manager for Kaseya BMS?
2. Who can use the NextTicket for Kaseya BMS app?
3. Accessing the NextTicket Manager for Kaseya BMS
4. FOR ADMINS: Setting up NextTicket
 - 4.1. How to set the ticket filter
 - 4.2. How to delete filter conditions
 - 4.3. How to reject a technician's ticket
5. FOR ADMINS: Setting up the point system for priority rules
 - 5.1. How to set up the point system
6. Best Practices in setting the priority rules
7. What are the NextTicket priority rules and functions?
8. FOR ADMINS: Add companies to the watch list
9. FOR ADMINS: Customize Ticket URL
10. FOR TECHNICIANS: How to use NextTicket
 - 10.1. Viewing your top-priority ticket
 - 10.2. Rejecting your top-priority ticket
11. Related Topics

1. Why should I use the NextTicket Manager for Kaseya BMS?

The NextTicket Manager for Kaseya BMS has the following benefits for your MSP:

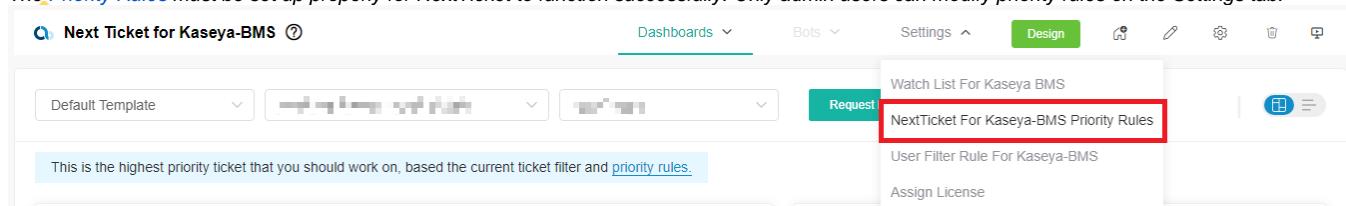
- Automatic and unbiased ticket dispatching - Tickets are automatically dispatched based on a point system and priority rules. This ensures that dispatchers and technicians assign and work on tickets objectively, according to approved priority, importance, and time criticality.
- Prioritization based 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. Who can use the NextTicket for Kaseya BMS app?

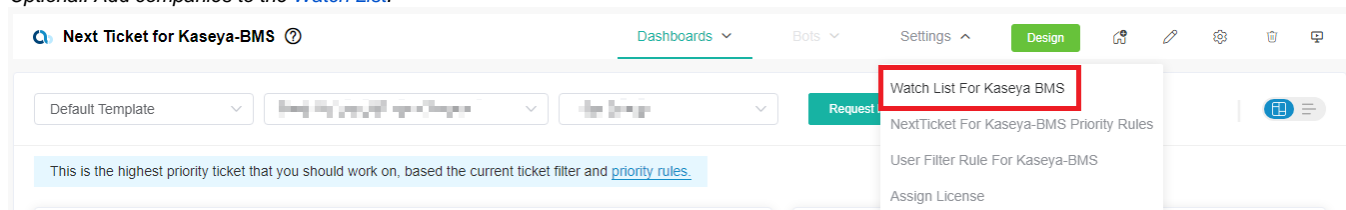
This app is available to the following:

- Kaseya BMS users with a working integration with MSPbots
- Technicians and dispatchers within the company's active directory
- Administrators with admin permissions for setting up the filters, points system, and priority rules

The [Priority Rules](#) must be set up properly for NextTicket to function successfully. Only admin users can modify priority rules on the Settings tab.



Optional: Add companies to the [Watch List](#).



3. Accessing the NextTicket Manager for Kaseya BMS

Follow these steps to access the NextTicket app for Kaseya in MSPbots:

1. Open the [MSPbots app](#).
2. Click **Apps** on the left pane.
3. When the Apps tab opens, search for **NextTicket for Kaseya BMS** and click it to open.

4. FOR ADMINS: Setting up NextTicket

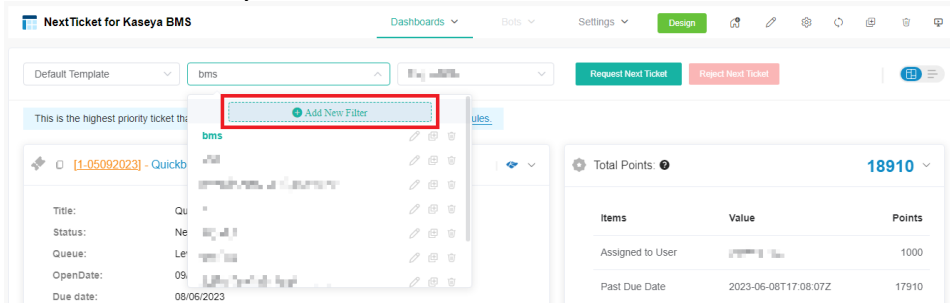
Only Admin users have permission to adjust the settings of the NextTicket app.

4.1. How to 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 Kaseya BMS 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

=

Last Modified at 2023/06/22 20:53 CDT Cancel Preview Save

You can also click **Preview** to check if your new filter settings or conditions are valid before you save the changes.

Filter Settings ×

Filter Name


=

Last Modified at 2023/06/22 20:53 CDT Cancel Preview Save

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

4.2. How to 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.

Filter Settings ×


Filter Name

AND OR +

Client

=


Acme Corporation



Status

=


New



Cancel

Preview

Save

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

Filter Settings ×


Filter Name

AND OR +

Client

=


Acme Corporation



Status

=


New



Cancel

Preview

Save



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

Clear All


4.3. How to reject a technician's ticket


The next priority ticket and its details appear after you select a filter and a user on the NextTicket for Kaseya BMS screen. If you think that this ticket should not be the user's next top-priority ticket, reject the ticket and specify the reason why the user can't work on it.

To reject the top priority ticket of a user, follow these steps:

Next Ticket for Kaseya-BMS ? Dashboards Bots Settings Design 🔍 ✎ ⚙️ 🗑️ 🔄


Default Template


1 

2 

3 Request Next Ticket Reject Next Ticket

This is the highest priority ticket that you should work on, based the current ticket filter and [priority rules](#).





[1-08142021] - Automatic reply: -=Triada Networks=- Your password will expire in 4 days

Title:

Automatic reply: -=Triada Networks=- Your password will expire in 4 days

Status:


Completed

Queue:

Helpdesk Support

OpenDate:

2021/08/14

Total Points: 

2000

Items	Value	Points
Contact POC		1000
Receive Invoices		1000

- On the NextTicket for Kaseya BMS screen, select the applicable filter from the **Tickets filter** list.
- Next, select the technician's name from the **User** list to view details of the assigned next top-priority ticket.
- Review the details and click **Reject Next Ticket**.
- When the Reject Ticket window opens, select or type the reason for rejecting the ticket, and click **Save**.

Reject Ticket ×

Why are you rejecting this ticket?

Cancel

Save

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

You can define the point system for the NextTicket for Kaseya BMS 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 Kaseya BMS screen, and select **NextTicket For Kaseya BMS 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. Let's set the Priority Type rule as an example.
 - a. Select a ticket priority type from the **If ticket priority =** field.

- b. Then in the **add points** field, enter the number of points that will be given to tickets that meet the condition selected in Step 3a.
- c. Do the same for the other rules you want to configure. Refer to the section on the [priority rules and functions](#) below to determine 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. You have the following options after setting up each priority rule:

- Enable the rule you have set by clicking the corresponding toggle switch.
- Load the rule's default value. Click the **Load Default** icon.
- Click the **Save & Test** icon to save the changes for the specific priority rule and to test the values of the rule.
- Save your changes on the rule by clicking the **Save** icon.
- Delete the rule and click the **Delete** icon to delete the rule.

5. Do any of the following options after setting up all your preferred priority rules:

- Test the calculation result for all the priority rules. Click **Test All**.
- Load the default values for all the priority rules. Click **Load Default All**.
- Save the changes for all the priority rules. Click **Save** and select **Save All**.
- 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**.

6. 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 try the NextTicket Manager for Kaseya BMS app 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 until you don't need to modify anymore.
7. Request and create new rules that are unique and not duplicates of existing ones.

7. 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
Account Type	Adds corresponding points to the ticket when a ticket matches the account type selected
Assigned to User	Adds the indicated points if the ticket is assigned to the current user
Contact POC (Point of Contact)	Adds corresponding points to tickets that match the identified Contact POC (Yes/No)
Past Due Date	Adds the indicated points to a ticket every hour past its due date
Priority Type	Adds the indicated points to tickets with the selected priority type
Receive Invoices	Adds corresponding points to a ticket when it matches the selected Receive Invoices (Yes/No)
SLA Resolution Expiration Time	Adds corresponding points to the ticket if its expiration matches the specified number of minutes before or after the SLA resolution expiration time
SLA Response Expiration Time	Adds corresponding points to the ticket if its expiration matches the specified number of minutes before or after the SLA response expiration time
Secondary Assignee	Adds corresponding points to the ticket depending on the Secondary Assignee(s) field
Service Call Schedule Expiration	Adds points when the Service Call Schedule Expiration of the ticket matches the specified number of minutes before (Include the minute) or after (Not include the minute) the start or end time <i>Note: Only the first matching rule will be used.</i>
Ticket Age	Adds corresponding points to a ticket for every min/hour/day that has elapsed from the Creation Date
Ticket Last Activity Update	Adds points to tickets ticket if the last activity update was updated
Ticket Status vs User	Adds corresponding points to a ticket if it has the identified Ticket Status and the indicated User requested to handle the ticket
Time In Status	Adds corresponding points to a ticket when it has been in a selected status over a given duration
Time from Last Update	Adds the indicated points to a ticket every hour past its last update time

Related Topics

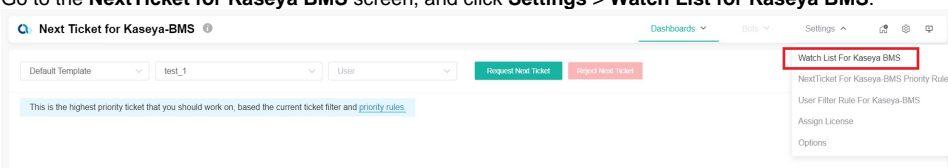
- [Configuring NextTicket Priority Rules According to Requirements](#)
- [Assigned User Due Date Priority Rule for NextTicket](#)

8. FOR ADMINS: Add companies to the watch list

Adding companies to your watch list allows you to give additional points to the tickets that they log so you can bump the priority of their tickets.

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

1. Go to the **NextTicket for Kaseya BMS** screen, and click **Settings > Watch List for Kaseya BMS**.



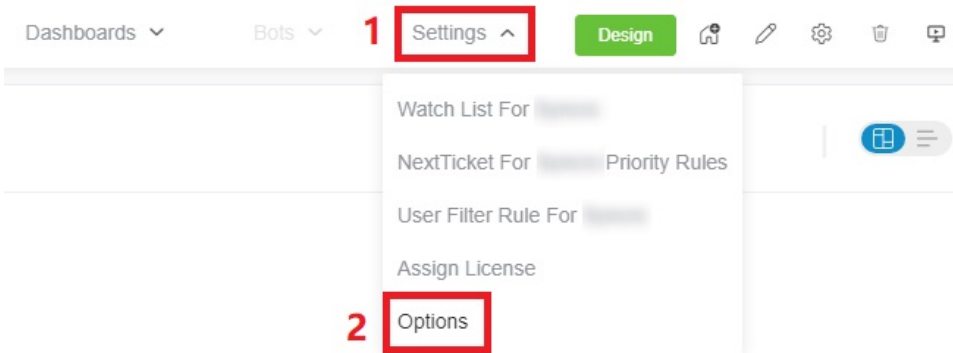
2. When the Client Watch List for Kaseya BMS tab opens, click **Add Company**.
3. In the Add Company window, select the checkbox for the companies you want to add.
4. If you want to show and select only companies with an agreement, select the checkbox for **Only show companies have an agreement**. Don't forget to provide the reason for adding the selected companies in the **Why add to the watch list?** text box.
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](#).

9. FOR ADMINS: Customize Ticket URL

1. Go to [Next Ticket for Kaseya BMS](#) app.

2. Click **Settings> Options**.



3. When the Options tab appears, toggle the **Customize Ticket URL** switch and enter your custom ticket URL, replacing the actual ticket number with the **{{TicketNumber}}** token.

- For example, if the original ticket URL is https://manage.mspbotssample.com/v4_6_release/ConnectWise.aspx?locale=en_US&routeTo=ServiceFV&recid=5027470, and you want to customize the ticket URL to <https://mtx.link/5027470>, you need to enter <https://mtx.link/{{TicketNumber}}> in the "Customize Ticket URL" option. So, when you click on the ticket number, the link will point to <https://mtx.link/5027470>.

The "Customize Ticket URL" feature is universal in the Attendance Manage and all NextTicket apps:

- ✓ If you toggle on the "Customize Ticket URL" switch in any one of the attendance management or all the NextTicket apps, the switch for this feature in the remaining apps will also be turned on. If you turn off the switch in any of these apps, the switch for this feature in the remaining apps will also be turned off.
- When you configured the "Customize Ticket URL" in any of these apps, it will be applied to all the remaining apps.
- If the "Customize Ticket URL" switch is turned off, the ticket links will remain as the originally generated links.

A screenshot of the 'Options' dialog box. The 'Basic' tab is selected. The 'Customize Ticket URL' section has a toggle switch turned on. Below the toggle is a text input field containing the example URL 'eg. https://mspbpts.ai/{{TicketNumber}}'. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

4. Click **Save** to keep your settings.

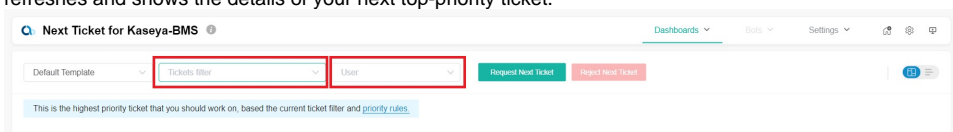
10. FOR TECHNICIANS: How to use NextTicket

10.1. Viewing your top-priority ticket

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

To view your top-priority ticket:

- Go to the **NextTicket for Kaseya BMS** screen and select a filter from the **Tickets filter** and **User** dropdown lists. The screen automatically refreshes and shows the details of your next top-priority ticket.



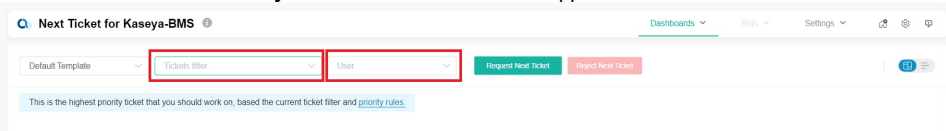
2. Select either **Dashboard View** or **List View** to view the ticket details according to your preference.

10.2. Rejecting your top-priority ticket

If you think that your next top-priority ticket should not be yours, reject it and give the reason why you can't work on the ticket.

To reject your top-priority ticket:

1. Go to the **NextTicket for Kaseya BMS** screen and select the applicable filter from the **Tickets filter** and **User** dropdown lists.



2. Once the details of your top priority ticket appear on the screen, click **Reject Next Ticket**.
3. When the Reject Reason window opens, provide the reason why you want to reject the ticket, and click **Save**.

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

11. Related Topics

- [How to Create an Advanced Rule for NextTicket Manager](#)
- [NextTicket Manager for Halo](#)
- [NextTicket for ConnectWise Manage](#)
- [What is the NextTicket Manager](#)
- [NextTicket Manager: Frequently Asked Questions](#)