NextTicket Manager for Syncro

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 Syncro** is designed for Syncro 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 Syncro?

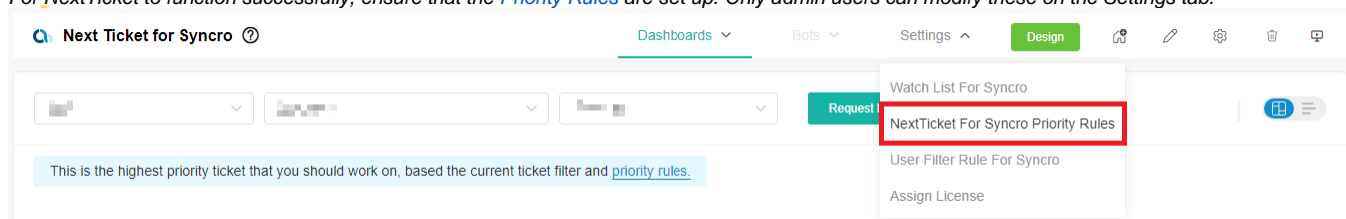The NextTicket Manager for Syncro has the following benefits for your MSP:

- Automatic and unbiased ticket dispatching - Tickets are dispatched automatically based on priority rules and a point system to ensure that dispatchers and technicians assign and work on tickets objectively based on an approved priority, importance, and time criticality.
- Prioritization based on company requirements - The priority rules and point system that define 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.
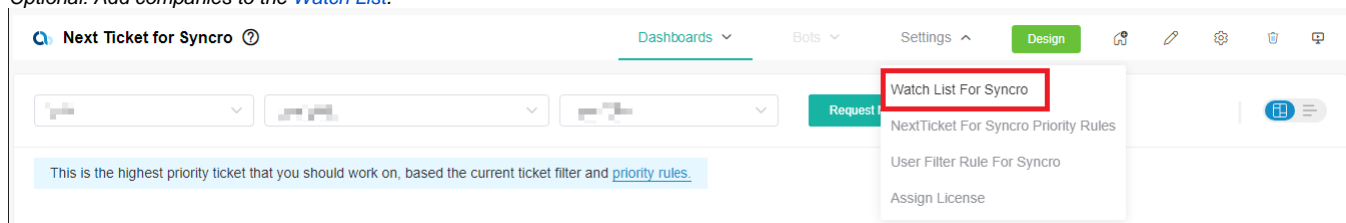
2. Who can use the NextTicket for Syncro app?

This app is available to the following:

- Syncro 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

For NextTicket to function successfully, ensure that the Priority Rules are set up. Only admin users can modify these on the Settings tab.

Optional: Add companies to the Watch List.

3. Accessing the NextTikcet Manager for Syncro

Follow these steps to access the NextTicket Manager for Syncro in MSPbots:

1. Open the **MSPbots** app.
2. Click **Apps** on the left pane.
3. When the Apps tab opens, search for **NextTicket for Syncro** and click it to open.

## 4. FOR ADMINS: Setting up NextTicket

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

4.1. How to set the ticket filter

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

Follow these steps to set the ticket filter:

1. On the NextTicket for Syncro screen, select the **Tickets filter** list, and then click **Add New Filter**.
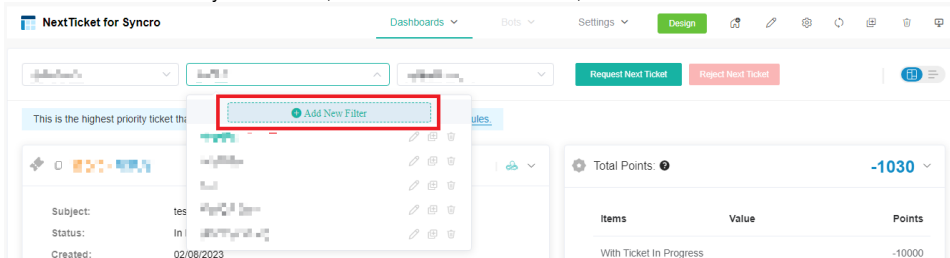
2. When the Filter Settings window opens, enter a name for your filter in the **Filter Name** box.
3. Next, add a condition for your filter by selecting the appropriate filter type from the **Select Fields** list.
4. To complete your condition, enter additional details in the two new fields or lists 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**.

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

   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.

- To delete all filter conditions at once, click 🗑 and then click **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 Syncro screen. If you think that this ticket should not be the next top-priority ticket of the user, reject the ticket and specify the reason why the user can't work on it.

Follow these steps to reject a top-priority ticket:

1. On the NextTicket for Syncro screen, select the applicable filter from the **Tickets filter** list.
2. Next, select the technician's name from the **User** list to view details of the assigned next top-priority ticket.
3. Review the details and click **Reject Next Ticket**.

4. When the Reject Ticket window opens, select or type the reason for rejecting the ticket and click **Save**.

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

Defining the point system for the NextTicket for Syncro priority rules calibrates the prioritization of the tickets.

5.1. How to set up the point system

1. Click **Settings** on the NextTicket for Syncro screen, and select **NextTicket For Syncro 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. Next 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. Do any of the following options after setting up each priority rule:

   - Enable the rule 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**.

5.2. Best Practices in setting the priority rules for NextTicket for Syncro

1. Interview your dispatcher or technician to identify the rules and conditions for your filters. An example of a rule is: If *<given scenario>,* then give more (or less) points.
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 results.
4. Encourage your technicians to try the NextTicket 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.

6. What are the NextTicket priority rules and functions?

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

Priority Rule	Function
Assigned User Due Date	Adjusts the priority for tickets assigned to a specific user and with a specific due date
Assigned to User	Adjusts the priority for tickets assigned to the current user
Company in "Watch List"	Adjusts the prioritization of tickets with a company on the watch list
In Progress Ticket	Set this rule to deduct priority points from tickets with the In-Progress status to decrease its priority to other users.
Past Due Date	Allows you to indicate how many priority points should be added to a ticket every hour past its due date
Priority Type	Adds priority points to tickets according to the priority type
Ticket Age	Adds priority points to a ticket for every minute, hour, or day after the creation date
Ticket In Status With Past Due	Adjust priority points based on ticket status, past due or not
Ticket Status to User	Adjusts priority points to tickets based on the ticket status and assigned user
Ticket Title	Allows you to adjust points for tickets with specific keywords in the ticket title
Time In Status Per Minutes	Allows you to add priority points for every minute that a ticket stays on the same status
Time from Last Update	Set this rule to add priority points to tickets every hour past their last update time

Related Topics

- Configuring NextTicket Priority Rules According to Requirements
- Assigned User Due Date Priority Rule for NextTicket

7. FOR ADMINS: Adding companies to the watch list

By adding companies to the watch list, you can give additional points to the tickets logged by these companies and follow up as needed. that they log so you can bump the priority of their tickets.

Follow these steps to add companies to the watch list:

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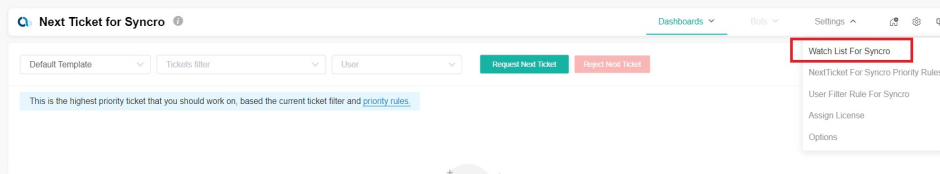

2. When the Client Watch List for Syncro tab opens, click **Add Company**.
3. In the Add Company window, select the checkbox for the companies you want to add.
4. If you want to show and select only companies with an agreement, select the checkbox for **Only show companies have an agreement**. Don't 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.

8. FOR ADMINS: Customize Ticket URL

1. Go to **Next Ticket for Syncro** app.

2. Click **Settings**> **Options**.
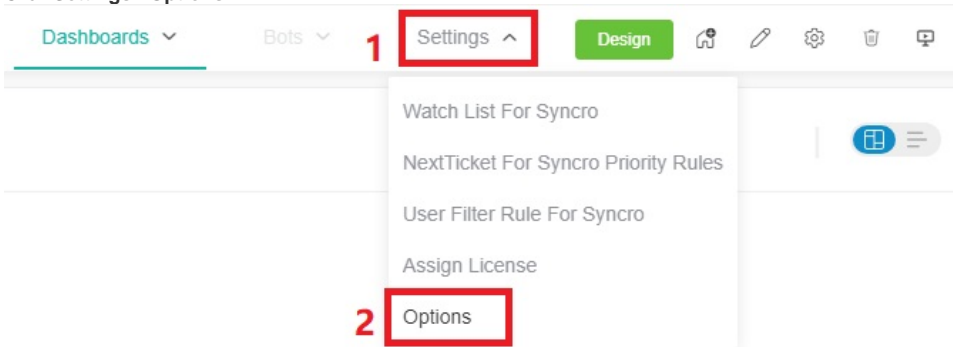
3. When the Options tab appears, toggle the **Customize Ticket URL** switch and enter your custom ticket URL, replacing the actual ticket number with the **{{TicketNumber}}** token.
    - For example, if the original ticket URL is *https://manage.mspbotssample.com/v4_6_release/ConnectWise.aspx? locale=en_US&routeTo=ServiceFV&recid=5027470*, 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.


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

9. FOR TECHNICIANS: How to use NextTicket for Syncro

9.1. Viewing your top-priority ticket

As a technician, your next top-priority ticket is shown on the **NextTicket for Syncro** 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 Syncro** 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.
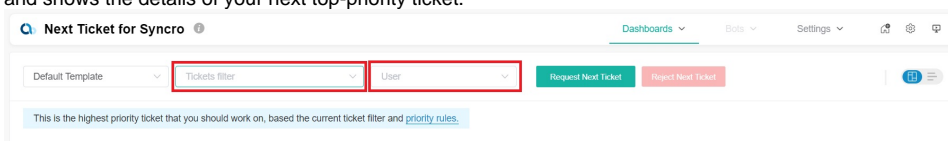
2. Select either **Dashboard View** or **List View** to view the ticket details according to your preference.

9.2. 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 Syncro** screen and select the applicable filter from the **Tickets filter** and **User** dropdown lists.
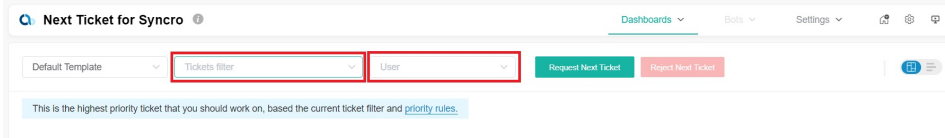
2. Once the details of your top priority ticket appear on the screen, click **Reject Next Ticket**.
3. When the Reject Reason window opens, select or type the reason why you want to reject the ticket, and click **Save**.

For more information on how to use NextTicket, read the article What is NextTicket Manager?

10. Related Topics

- NextTicket Manager Priority Rules
- How to Create an Advanced Rule for NextTicket Manager
- NextTicket Manager for Halo
- NextTicket for ConnectWise Manage
- Setting Up the Point System for NextTicket Priority Rules