

NextTicket Bots for ConnectWise Manage

The volume of rejected tickets and the utilization rate are two of the measures that are valuable to MSPs. Insights from these data help managers and business owners streamline ticketing, improve technicians' skill sets, and assess and plan resource requirements. NextTicket for ConnectWise Manage has bots that help users and managers monitor ticket rejection and utilization rates more proactively. These are the Reject Alert, Rejected Ticket Summary Alert, and Daily Utilization Alerts bots.

This article discusses the following:

- [Descriptions and Features](#)
- [Where can I find the NextTicket for ConnectWise Manage Bots?](#)
- [What is Trigger and where can I edit the Trigger Script?](#)
- [What is Alert and how can I edit the Alert Script?](#)
- [What is Escalate and how can I edit the Escalation Script?](#)
- [Related Topics](#)

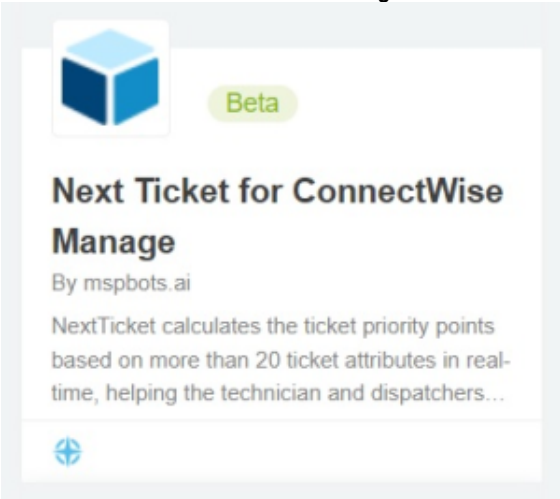
Descriptions and Features

Name of the Bot	Description	Trigger	Alert Message	Escalation
ConnectWise Manage NextTicket Rejected Alert	This bot sends an alert to the member and the manager when a member rejects the next ticket. The alert also indicates the reason for rejecting the ticket.	Runs every 15 minutes	To: {Manager Email}; {Member Email} {Member} has rejected a next ticket. Ticket: {Ticket} Client: {Client} Summary: {Summary} Reason: {Reason} Date Rejected: {Date Rejected}	Weekly Threshold: The alert is sent on the 3rd, 6th, and 9th time of ticket rejection.
ConnectWise Manage NextTicket Rejected Ticket Summary Alert	This bot sends managers alerts containing the summary of rejected tickets for the week.	Runs weekly, every Friday at 7:00 PM	Hi {Manager}, Total Number of Tickets Rejected: {Number of Tickets Rejected} The following members who rejected Next Tickets. {Ticket Rejectors} Reasons: {Reasons} If you think you shouldn't be receiving this alert please click here.	Weekly Threshold: The alert is sent on the 3rd, 6th, and 9th time of ticket rejection.
ConnectWise Manage NextTicket Daily Utilization Alert	This bot sends alerts to users who have below 60% NextTicket utilization at the end of their shift.	Runs daily at 5:00 PM	To: Member Email Hi {Member}, Good Job on handling {Number of ConnectWise Updated Tickets} tickets! However, you used NextTicket only {Number of Worked Tickets from NextTicket} times (lower than your company's preferred rate of 60%). Remember that NextTicket improves your efficiency by helping you work on the most important tickets first and helping you avoid missing any ticket. Your company prefers that you use NextTicket for at least 10 tickets.	Weekly Threshold: The alert is sent on the 3rd, 6th, and 9th time of ticket rejection.

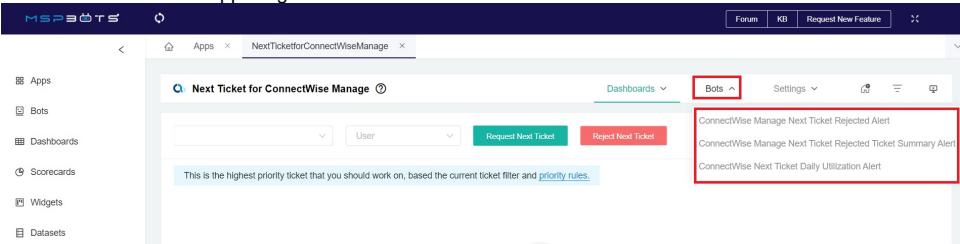
Where can I find the NextTicket for ConnectWise Manage Bots?

1. Navigate to [Apps](#) on the MSPbots menu.

2. Click **Next Ticket for ConnectWise Manage**.



3. Hover over **Bots** in the upper right corner to show the NextTicket bots.



What is Trigger and where can I edit the Trigger Script?

The Trigger is one of the toggle switches for bots that are found in the **Detail** tab. Switching the **Trigger** ON makes the bot available and running.

ConnectWise Manage Next Ticket Rejected Alert

Detail

Run History

Analytics

Bot Messages

Bot Change Logs

Design

ConnectWise Manage Next Ticket Rejected Alert

Alerts the member and manager when member rejected a next ticket

Trigger

Alert

Escalate

This switch is also found in the Bots tab under Grid or List view. It is enabled by default

To edit the trigger script, click **Design**, follow the prompts, and click **Finish** to save. Below is the table of screenshots for setting up the trigger.

	Trigger Script	Advance Scheduler Setting
N a m e o f t h e B o t		

Trigger



Trigger Script:

Define the Bot and the conditions of when it will be executed.

I want the bot to trigger when

Widget Please Select A Widget

meet following criteria:

AND OR + -

Date Rejected In {last/15/minutes/ur}

I want the bot to run base on this schedule:

☒ Starting at 02/20/22 10:00:00 America/Chicago
Repeat every 15 Minute
☐ Repeat every 1 minutes
from hour to on day of week Select
☐ Advanced Scheduler 900 [Setting](#)

Next

Advanced Scheduler

Minutes

- ☐ Every minute
- ☐ Every 5 minute(s) starting at min
- ☐ Specific minute (choose one or many) [Select](#)
- ☐ Every minute between minute 1

Hours

Day

Month

Year

0****?*

Trigger



Trigger Script:

Define the Bot and the conditions of when it will be executed.

I want the bot to trigger when

Widget Please Select A Widget

meet following criteria:

AND OR + -

Number of Tickets Reje I= 0

I want the bot to run base on this schedule:

☐ Starting at 06/08/22 09:44:10 America/Chicago
Repeat every 1 Hour
☐ Repeat every 5 minutes
from hour to on day of week Select
☒ Advanced Scheduler 0 0 19 ? * FRI * [Setting](#)

Next

Advanced Scheduler

Minutes

- ☐ Every minute
- ☐ Every 5 minute(s) starting at mir
- ☒ Specific minute (choose one or many) 0
- ☐ Every minute between minute 1

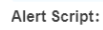
Hours

Day

- ☐ Every day
- ☐ Every 1 day(s) starting on 1
- ☐ Every 1 day(s) starting at the -
- ☒ Specific day of week (choose one or many) Fri
- ☐ Specific day of month (choose one or many) S
- ☐ On the last day of the month
- ☐ On the last weekday of the month
- ☐ On the last Sunday
- 0 0 19 ? * FRI *

Name of Bot	Alert Script
ConnectWise Manage Next Ticket Rejected Alert	

X



Microsoft Teams Chat

Manager Email... x



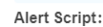
Date Rejected: {Date Rejected}

Save as a template

☐

Next

X



Microsoft Teams Chat

☒

Total Number of Tickets Rejected: {Number of Tickets Rejected}
The following members who rejected Next Tickets: {Tickets Rejectors}
Reasons: {Reasons}
For more details please click [here](#).
If you think you shouldn't be receiving this alert please click [here](#).

Save as a template

☐

Email

Next

ConnectWise Next Ticket Daily Utilization Alert

Alert Script:

Define the messaging specifications (Who, What, When, Where) for intended recipients. Customize the template, or compose your own message for notifying to make corrections to a previous action, to perform tasks, or inform/commend the results of their work.

Alert

Microsoft Teams Chat

Add and edit the content you want to send, and select the teams chat to receive the content.

To:

Hi, {dimension1}!

Good job on handling {Number of ConnectWise Updated Tickets} tickets! However, you used Next Ticket only {Number of Worked Tickets from NextTicket} times (lower than your company's preferred rate of 60%).

Remember that Next Ticket improves your efficiency by helping you work on the most important tickets first and helping you avoid missing any ticket. Your company prefers that you use Next Ticket for at least 10 tickets.

☐ Preview Choose Template: [Choose Template](#) [Save as a template](#)

Microsoft Teams Channel

Add and edit the content you want to send, and select the teams channel to receive the content.

[Previous](#) [Next](#)

What is Escalate and how can I edit the Escalation Script?

The **Escalate** switch enables the bot to send an escalation message to the person or manager specified in the escalation setup. Escalation scripts are sent whenever members fail to perform tasks or corrective actions. This switch is OFF by default.

To activate the Escalation Alert, turn ON the **Alert** switch, then turn ON the **Escalate** switch.

[Detail](#)
[Run History](#)
[Analytics](#)
[Bot Messages](#)
[Design](#)

Details about this table

☒ Trigger
 ☒ Alert
 ☒ Escalate

To edit the Escalation script for each bot, click the **Design** tab. Click **Next** and navigate to the Escalation window, then edit the script and conditions. Click **Next** to go to the next window and click **Finish** to save.

Below is the table of screenshots for setting up the escalation.

Name of Bot	Escalation Step 1	
<p>ConnectWise Manage NextTicket Rejected Alert</p> <p>Time Frame ⓘ</p> <p>Set a cycle for the escalation program.</p> <p>Week</p>	<div> <div> <p>Escalation Step 1</p> <p>If the bot triggered 3 times this cycle, send the following message to users(who selected in Alert) User.</p> <p>Escalation Threshold</p> <p>3</p> <p>+ Add Message</p> </div> <div> <p>Select send to: User</p> <div> <p>Dear {USER_FIRSTNAME}, you have triggered {BOT_NAME} {ESCALATION_TIME} times this week. If you need help to fix this issue, please reach out to {MANAGER_NAME} . The system will notify {MANAGER_NAME} after 6 times.</p> </div> </div> </div> <p><input type="checkbox"/> Preview Choose Template: Escalation-User(Lv1) Save as a template</p>	<div> <div> <p>Escalation Step 2</p> <p>If the bot triggered 6 times this cycle, send the following message to Manager.</p> <p>Escalation Threshold</p> <p>6</p> <p>Select send to: User</p> <div> <p>Dear {USER_FIRSTNAME} manager {MANAGER_NAME}</p> </div> </div> </div>

ConnectWise Manage NextTicket Rejected Ticket Summary Alert

Time Frame ⓘ

Set a cycle for the escalation program.

Week

Escalation Step 1

If the bot trigged 3 times this cycle, send the following message to users(who selected in Alert) User.

Escalation Threshold

3

+ Add Message

Select send to: User

Sans Serif Normal

Dear {USER_FIRSTNAME}, you have triggered {BOT_NAME} {ESCALATION_TIME} times this week. If you need help to fix this issue, please reach out to {MANAGER_NAME} . The system will notify {MANAGER_NAME} after 6 times.

Preview

Choose Template: Escalation-User(Lv1)

Save as a template

Select send to: User

Sans Serif Normal

Dear {USER_FIRSTNAME}, you have triggered {BOT_NAME} {ESCALATION_TIME} times this week. If you need help to fix this issue, please reach out to {MANAGER_NAME} . The system will notify {MANAGER_NAME} after 6 times.

Preview

Choose Template: Escalation-User(Lv1)

Save as a template

Select send to: User

Sans Serif Normal

Dear {USER_FIRSTNAME}, you have triggered {BOT_NAME} {ESCALATION_TIME} times this week. If you need help to fix this issue, please reach out to {MANAGER_NAME} . The system will notify {MANAGER_NAME} after 6 times.

Preview

Choose Template: Escalation-User(Lv1)

Save as a template

ConnectWise Manage NextTicket Daily Utilization Alert

Time Frame ⓘ

Set a cycle for the escalation program.

Week

Preview

Ch

Select send to: Manager

Sans Serif

Dear {MANAGER_N
times this week. Plea
after 9 times.

Preview

Ch

Escalation Step

If the bot trigged 6 ti
Manager.

Escalation Threshold

6

Select send to: User

Sans Serif

Dear {USER_Fi
manager {MAN

Preview

Select send to: Ma

Sans Serif

Dear {MANAG
times this wee
after 9 times.

Preview

Related Topics

- [How to Create or Modify Halo Tickets using a Rest API-based Bot](#)
- [Bots: Types, Functions, and FAQs](#)
- [Bots](#)
- [MSPbots 3.0 Bots for ConnectWise Manage](#)
- [Bots: How-to Guides](#)