NextTicket Bots for Autotask

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. Autotask has bots that help users and managers to monitor ticket rejection and utilization rates more proactively. These are the Reject Alert, Rejected Ticket Summary Alert, and Daily Utilization Alerts bots.

This article gives the following overview of these bots:

- Summary of Features
- Where can I find the Autotask Bots?
- What is Trigger and how 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

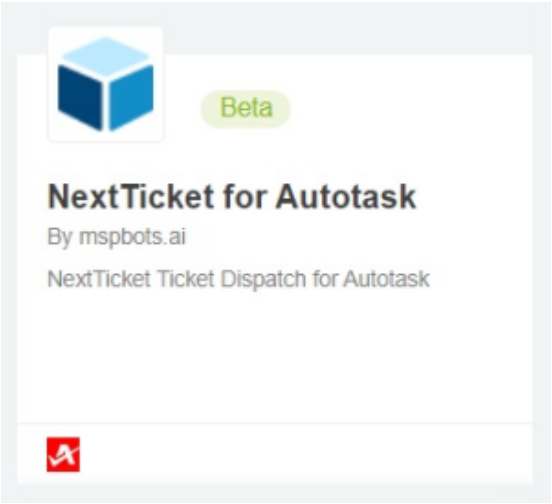
Summary of Features

Name of the Bot	Description	Trigger	Alert Message	Escalation
Autotask 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.
Autotask 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.
Autotask 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.

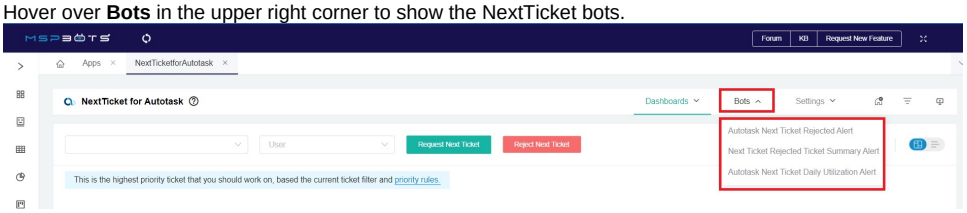
Where can I find the Autotask Bots?

1. Navigate to Apps on the MSPbots menu.

2. Click to **Next Ticket for Autotask**.

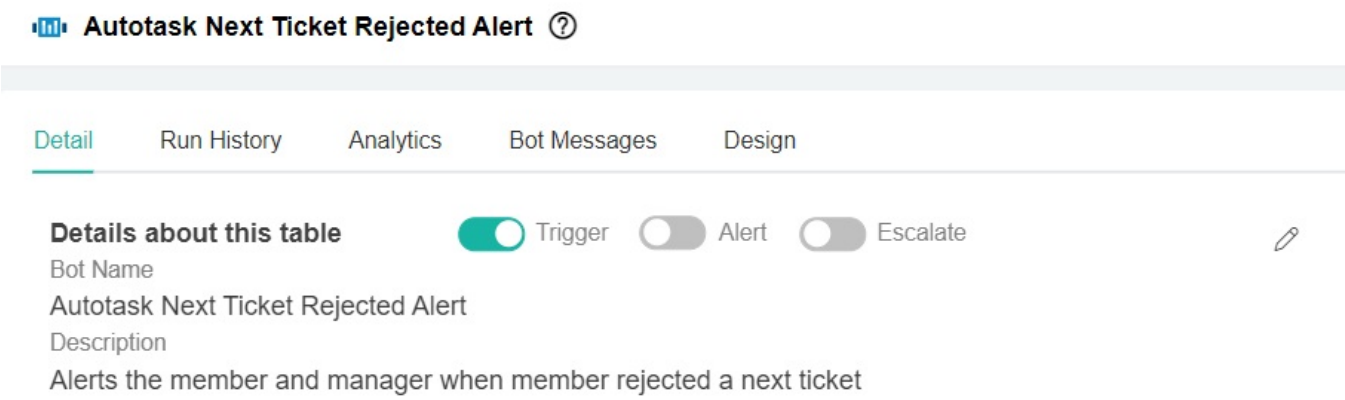


3. Hover over **Bots** in the upper right corner to show the NextTicket bots.



What is Trigger and how 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.

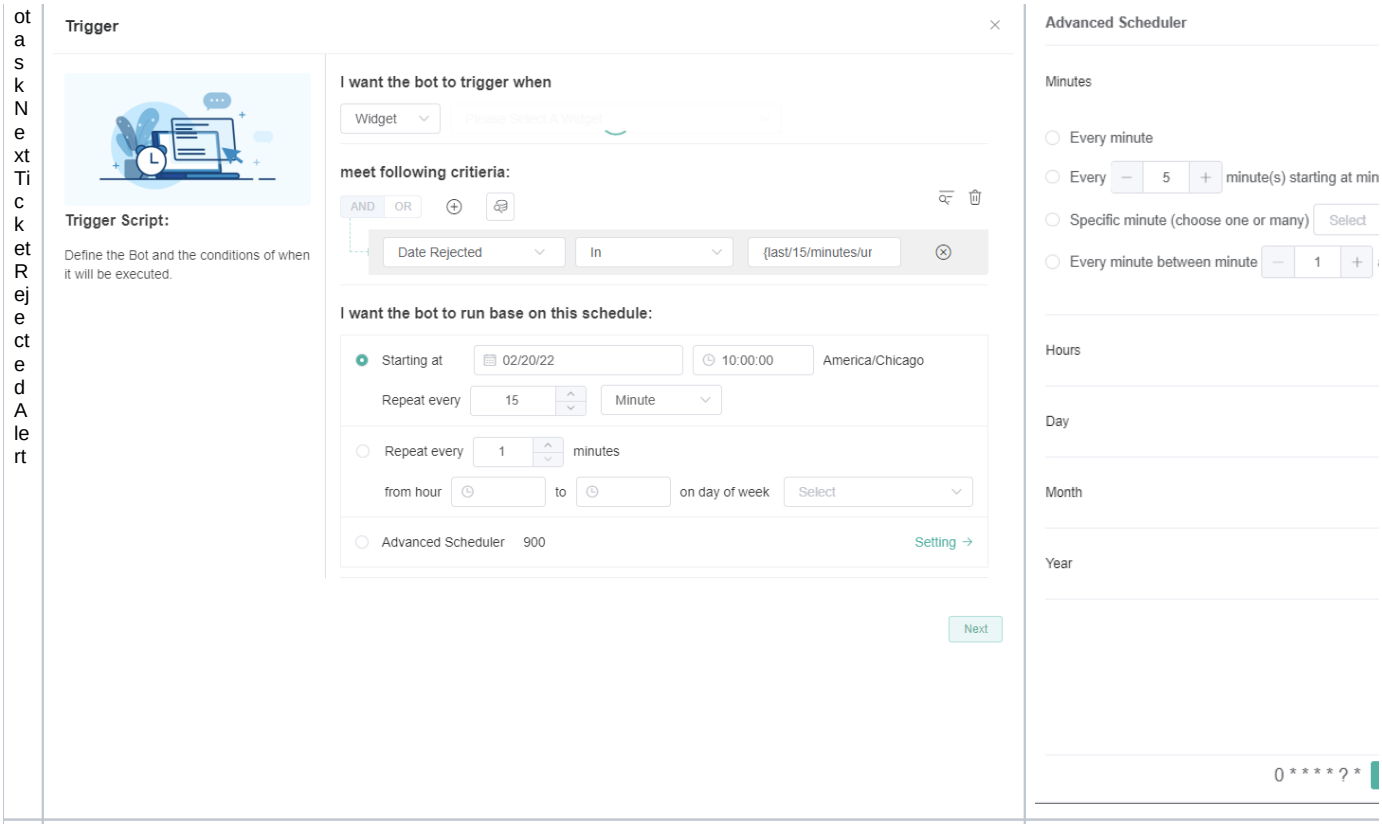


This switch is also found in the Bots tab under Grid or List view. It is enabled by default

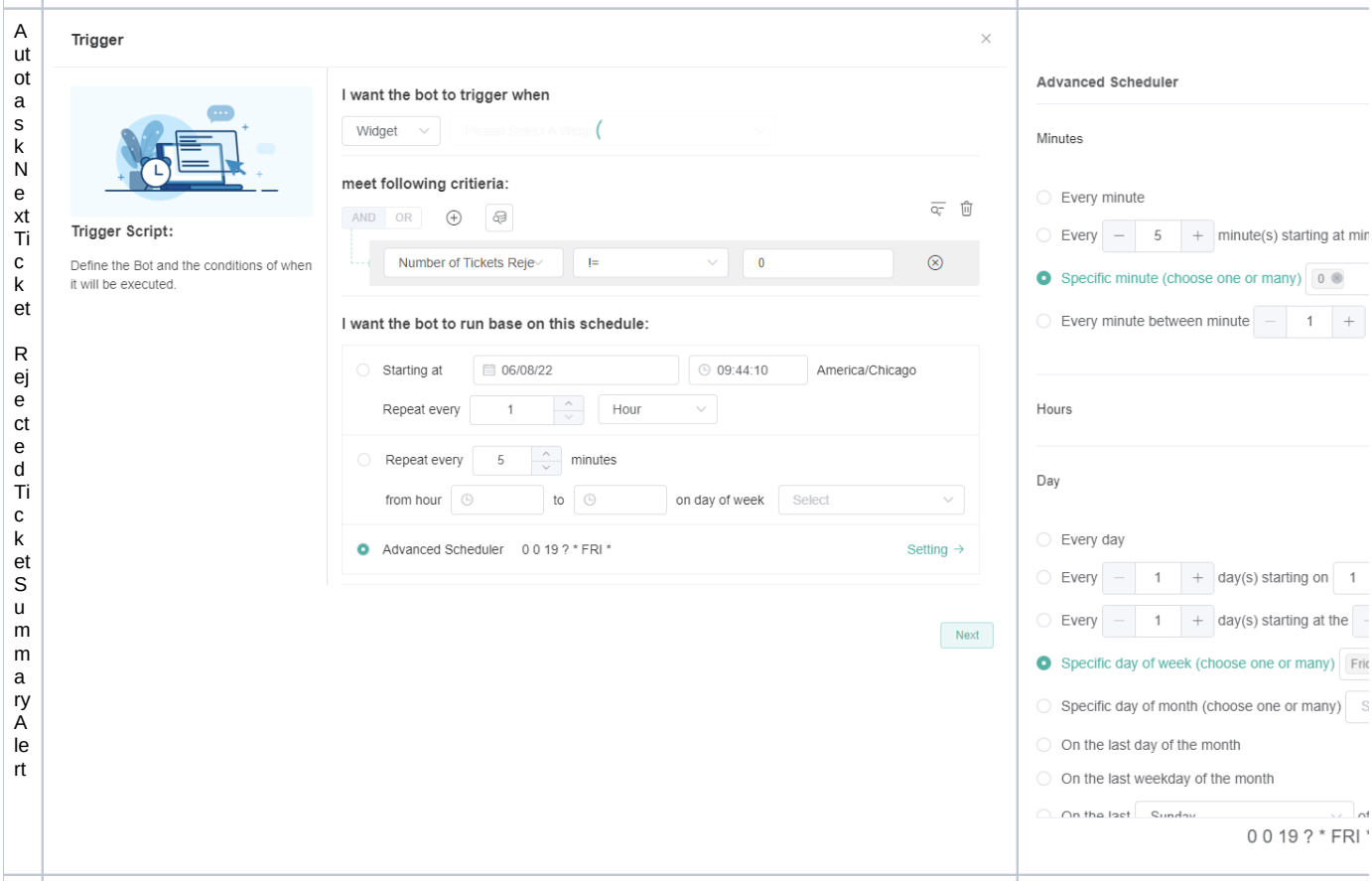
To edit the trigger script, click **Design**, follow the prompts, and click **Finish** to save. Below is the table of screenshots for setting up the trigger.

Name of the Bot	**Trigger Script**	**Advance Scheduler Setting**
Aut		

otaskNextTicketRejectedAlert

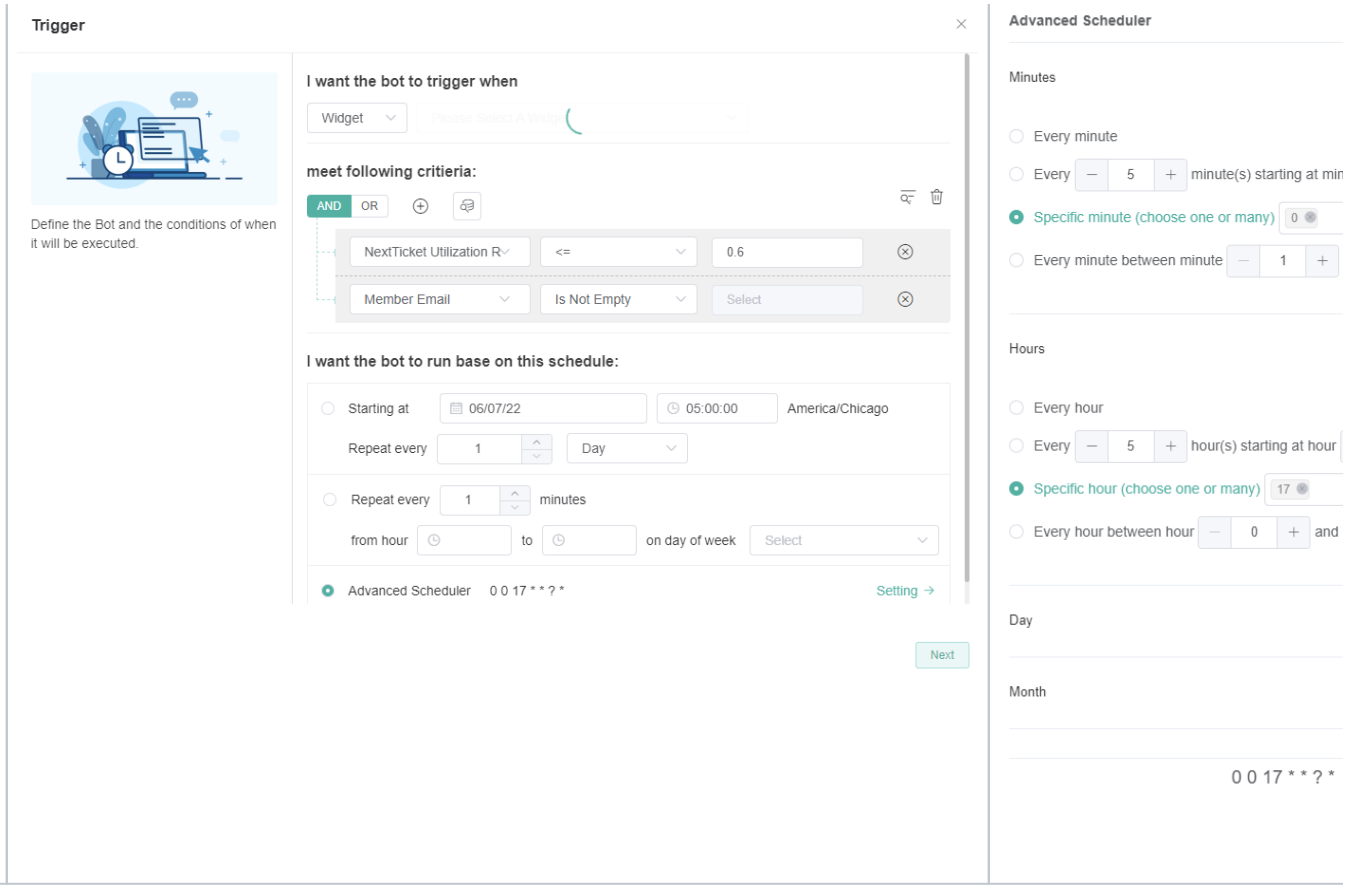


AutotaskNextTicketRejectedTicketSummaryAlert



Autotask

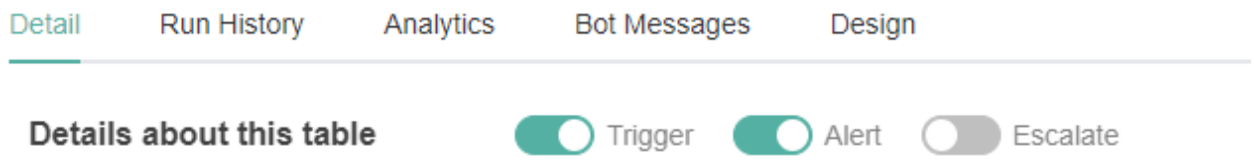
NextTicketDailyUtilizationAlert



What is Alert and how can I edit the Alert Script?

The Alert toggle switch enables the sending of alerts. Switching it ON sends the alert messages to managers and members based on the conditions in the alert script setup. Alerts may be sent through Teams chat, Teams channel, email, or web messages. This switch is OFF by default.

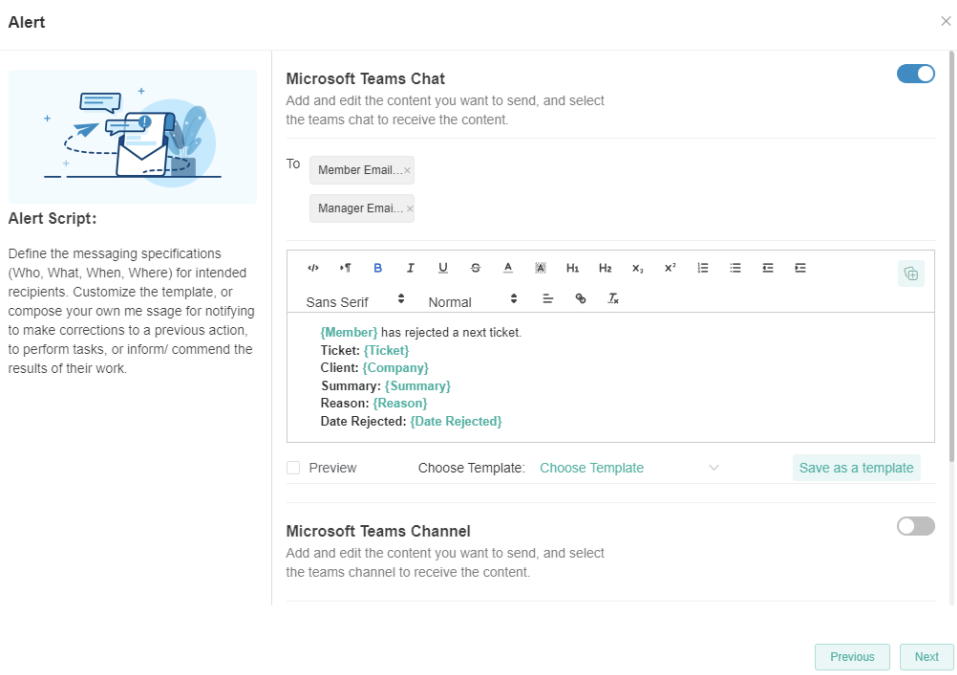
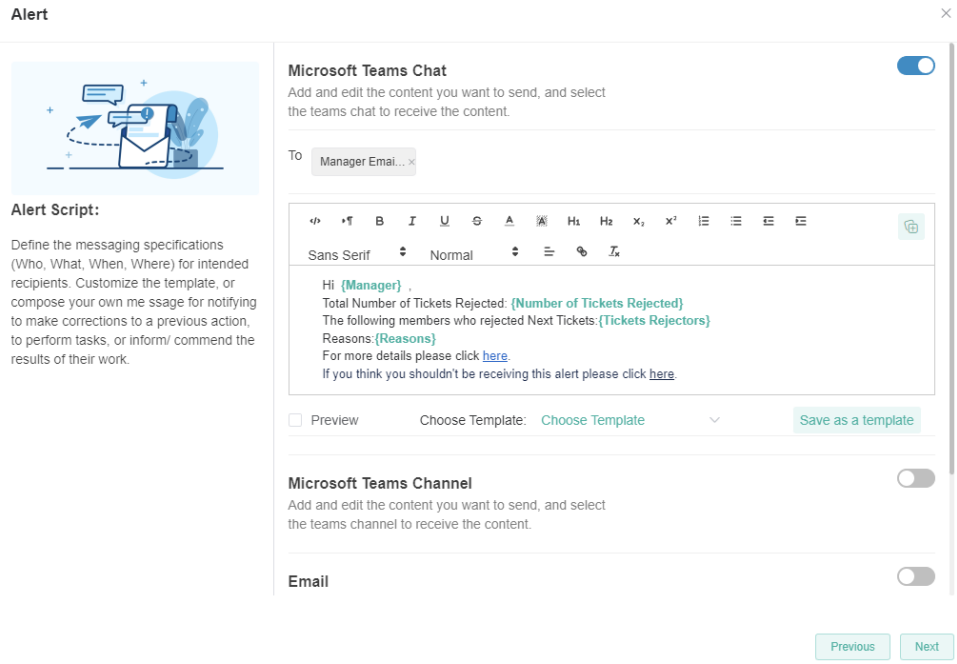
To activate and enable sending of alerts, switch ON the **Alert** toggle switch button.

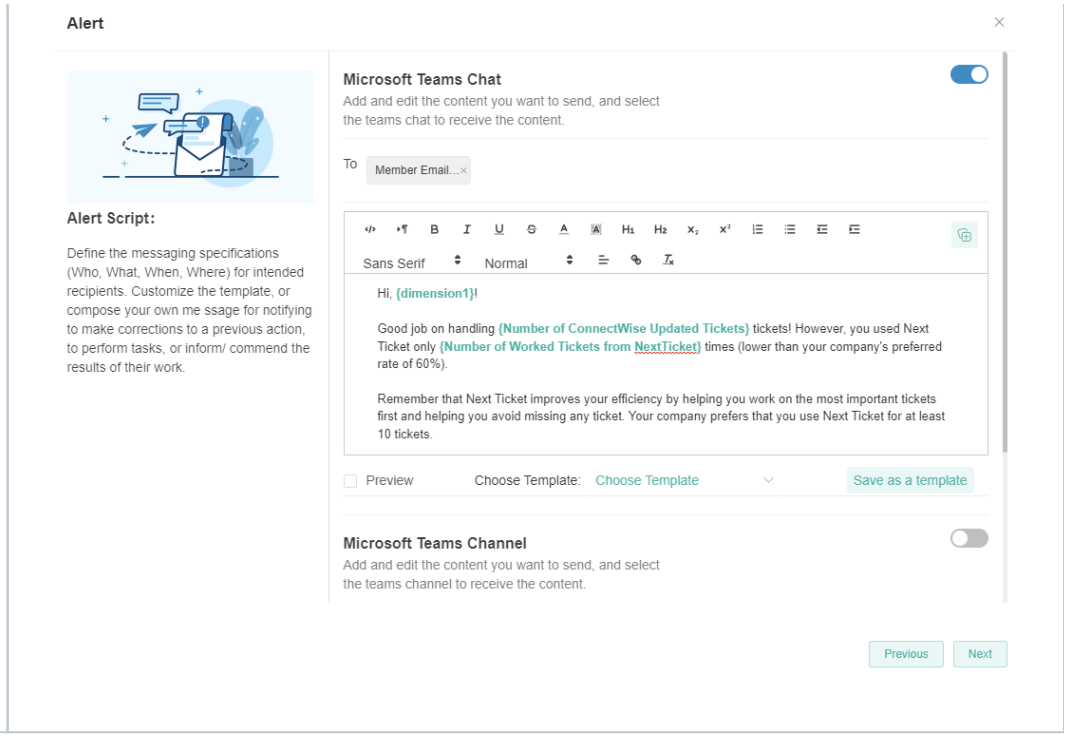


To edit the alert script, select a bot and go to the **Design** tab. Click **Next** to go to the Alert window and follow the prompts until you are done creating the script. Click **Finish** to save.

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

Name of Bot	Alert Script
Autotask NextTicket Rejected Alert	

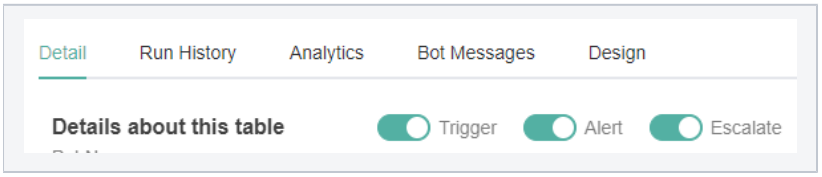
	
Autotask NextTicket Rejected Ticket Summary Alert	
Autotask NextTicket Daily Utilization Alert	



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

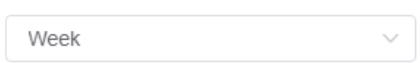
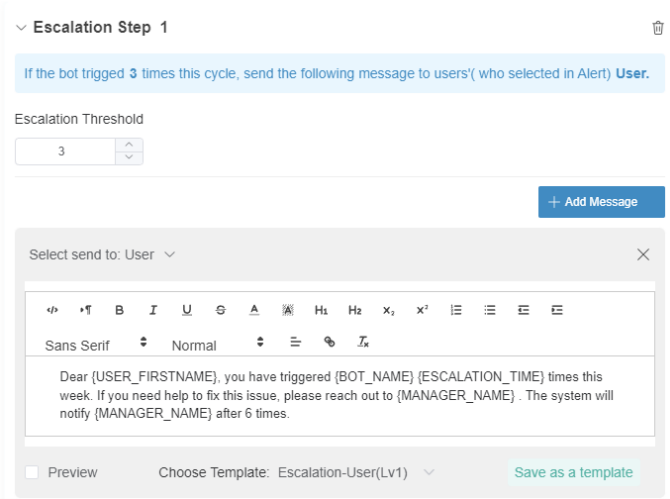
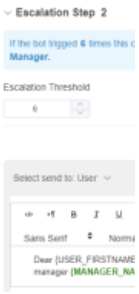
The **Escalate** switch enables the bot to send an escalation message to the person or manager specified in the escalation setup. Escalation scripts are sent whenever members failed to perform tasks or corrective actions. This switch is OFF by default.

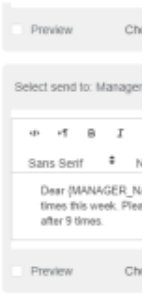
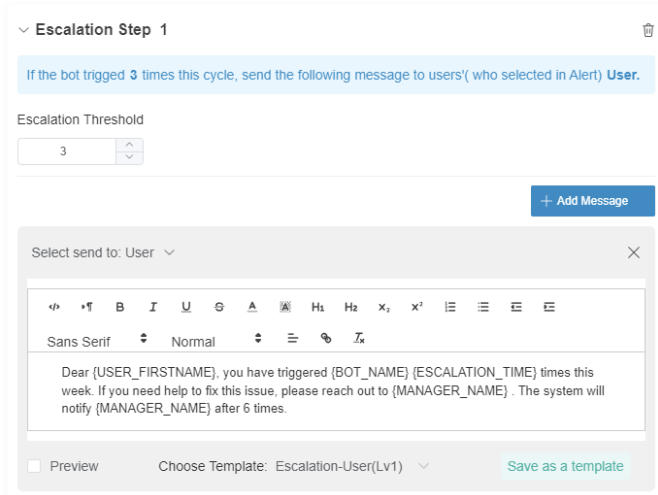
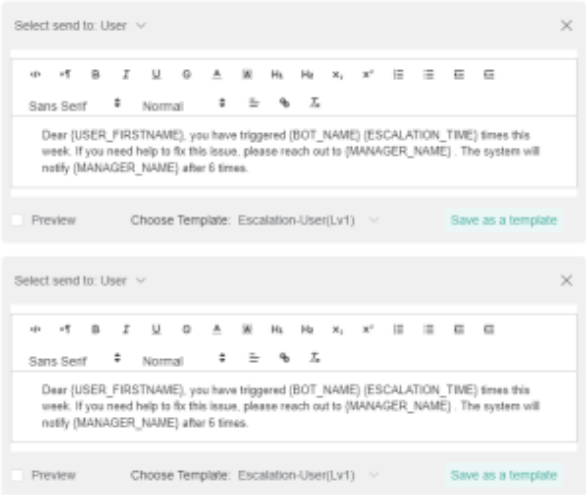
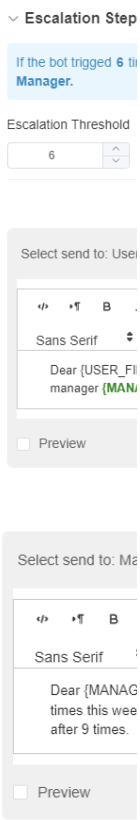
To activate the Escalation Alert, turn ON the **Alert** switch, then turn ON the **Escalate** switch.

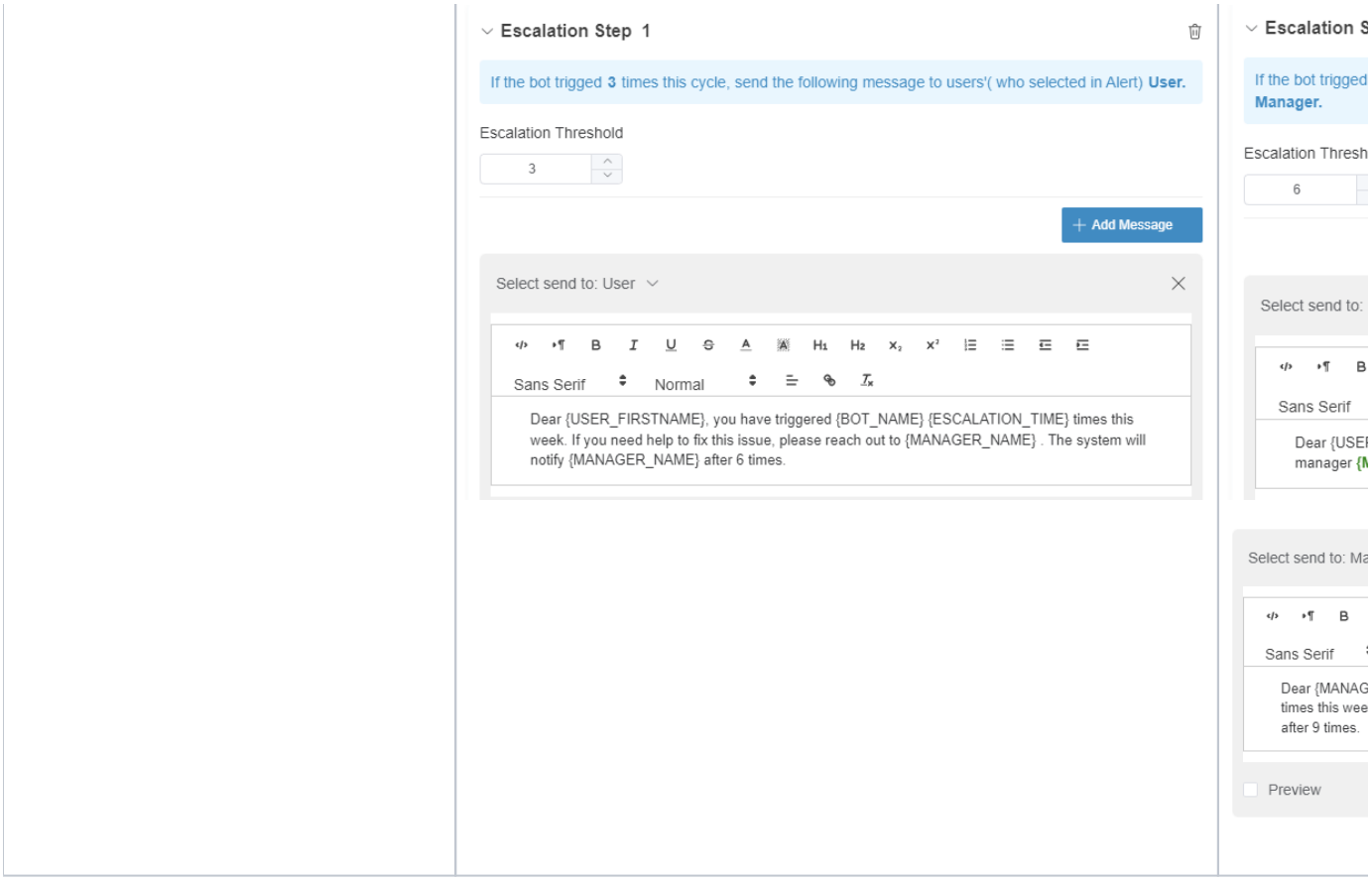


To edit the Escalation script for each bot, click the **Design** tab. Click **Next** and navigate to the Escalation window, then edit the script and conditions. Click **Next** to go to the next window and click **Finish** to save.

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

Name of Bot	Escalation Step 1	
Autotask NextTicket Rejected Alert  	 	

		
Autotask NextTicket Rejected Ticket Summary Alert 	  	
Autotask NextTicket Daily Utilization Alert 		



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