

ConnectWise Manage Attached Agreement Prompter

The ConnectWise Manage Attached Agreement Prompter is a bot that alerts the user when a time entry has no attached agreement. This article discusses the following:

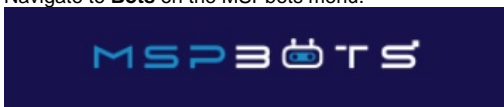
- [How is this bot helpful?](#)
- [How to Clone the ConnectWise Manage Attached Agreement Prompter Bot](#)
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How is this bot helpful?

The ConnectWise Manage Attached Agreement Prompter ensures correct agreement profitability calculation for each client with an agreement with your company. If there were no agreement attached to the technician's time entry, there is a chance that the agreement profitability would be inflated and inaccurate.

How to Clone the ConnectWise Manage Attached Agreement Prompter Bot

1. Navigate to **Bots** on the MSPbots menu.



 MarketPlace

 Apps

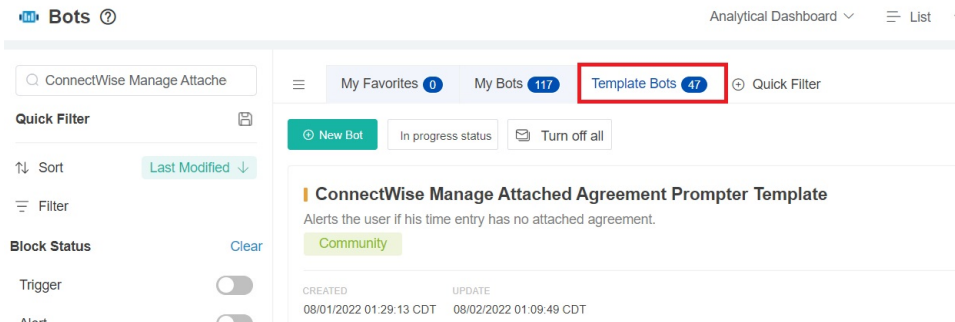
 Bots

 Dashboards

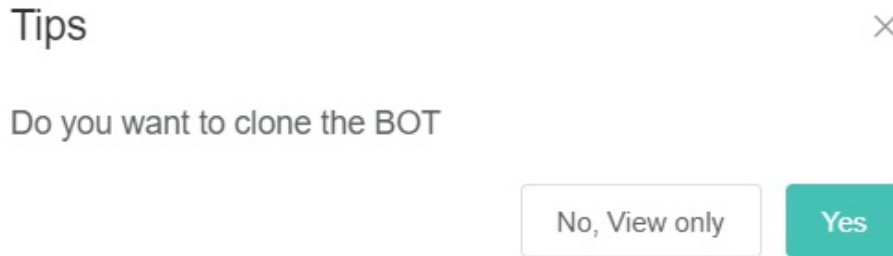
 Scorecards

 Widgets

2. Search for **ConnectWise Manage Attached Agreement Prompter Template**, then click the **Template Bots** tab.



3. Select the bot from the search results. This action shows the following pop-up with the message:



If you want to view the bot only, click the **No, View only** button. This action shows the bot settings for your review.
If you want to clone the bot, click **Yes** and proceed to the next steps.

4. On the Clone window, update the **Bot Name**. For example, type ConnectWise Manage Attached Agreement Prompter (Company Name).

The screenshot shows a 'Clone' window. The title is 'Clone' and there's a close button (X) in the top right corner. The form has several fields: 'Bot Name' (with a red asterisk) containing 'ConnectWise Manage Attached Agreement Prompter Template'; 'Role' (with a red asterisk) with a dropdown menu showing 'User' and 'Admin' options; 'Tag' with a dropdown menu showing 'Tag'; and 'Description' with a text area containing 'Alerts the user if his time entry has no attached agreement.'. At the bottom right, there is a 'Save' button.

5. Edit the content of the **Role** field by selecting the appropriate role type.
6. Click the **Save** button to clone the bot. You can configure the bot later if it is necessary.

Bot Configuration

To configure the bot for ConnectWise Manage Attached Agreement Prompter:

1. Go to **Bots** in the MSPbots app and open the ConnectWise Manage Attached Agreement Prompter (Company Name) bot.
2. Click the **Design** tab and select the configuration that you want to edit: **Real-time Data**, **DataFilter**, **Alert**, or **Escalation**.

The screenshot shows the MSPbots app interface. At the top, there's a navigation bar with 'Bots' and a search icon. Below it, the title bar reads 'bot-ConnectWise Manage Attached Agreement Prompter Template'. The main content area has a header 'ConnectWise Manage Attached Agreement Prompter Template' with a help icon. Below the header is a tab bar with 'Detail', 'Run History', 'Analytics', 'Bot Messages', 'Bot Change Logs', and 'Design'. The 'Design' tab is highlighted with a red box. Under the 'Design' tab, there's a section 'Details about this table' with three toggle switches: 'Trigger' (off), 'Alert' (off), and 'Escalate' (off). Below this, there's a 'Bot Name' field with the value 'ConnectWise Manage Attached Agreement Prompter Template' and a 'Description' field with the value 'Alerts the user if his time entry has no attached agreement.' Below the details section is a 'Recent run history' section with a table. The table has columns 'Start', 'Duration (s)', and 'Status'. The table is empty, showing 'No Data'. There's a link 'All runs' to the right of the table.

3. To edit Real-time Data:
 - a. Hover over the **ellipsis ...** icon and click **Edit**.

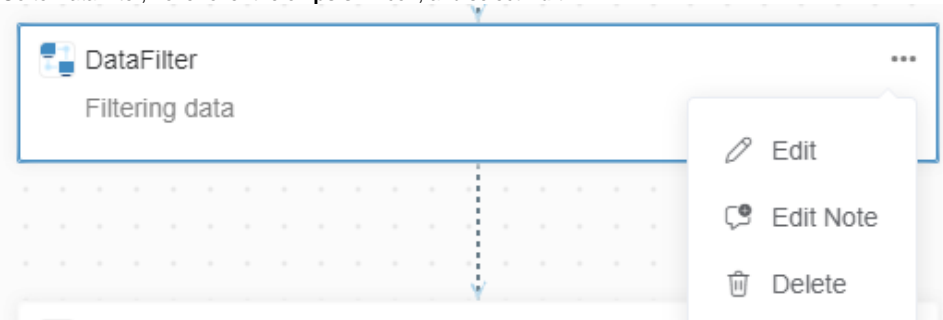
The screenshot shows the 'Real-time Data' configuration window. It has a title bar 'Real-time Data' with a close icon. Below the title bar is a large grid area. On the right side of the grid, there's a vertical ellipsis icon. A context menu is open, showing three options: 'Edit' (with a pencil icon), 'Edit Note' (with a speech bubble icon), and 'Delete' (with a trash icon). The 'Edit' option is highlighted.

- b. Select an option for **Data Source** from the drop-down menu and click **Next**. This action continues to the editing of the DataFilter.

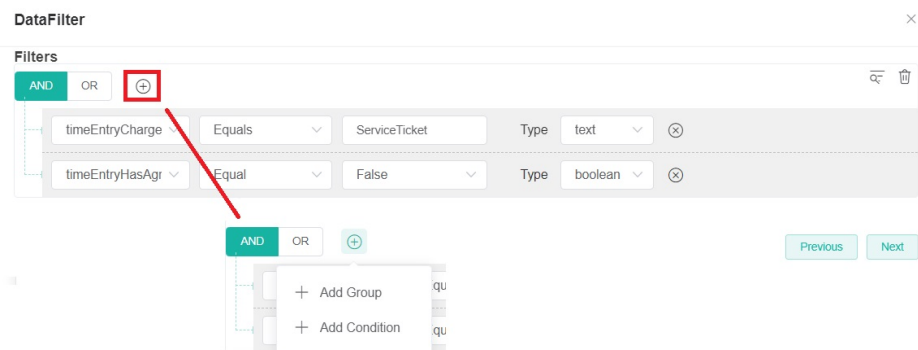
The screenshot shows the 'Real-time Data' configuration window. It has a title bar 'Real-time Data' with a close icon. Below the title bar is a section 'Data Source'. There's a dropdown menu with the text 'Select' and an upward arrow. The dropdown menu is open, showing four options: 'NewClientRegister', 'ConnectWise-Timeentry', 'AutoTask-Timeentry', and 'ConnectWise-Ticket'. Below the dropdown menu is a 'Next' button.

4. To edit Data Filter:

- a. Go to DataFilter, hover over the **ellipsis ...** icon, and select **Edit**.



- b. Edit the default settings by clicking the **+** button. This action allows you to add a new group and/or conditions.



- c. Click **Next** when done and ready to edit the Alert script. If you want to skip editing the Alert script message modal, click **Next** on the Alert window.

5. To edit the Alert script:

- a. Go to **Alert**, hover over the **ellipsis ...** icon, and select **Edit**.



- b. Select an option for sending the alert messages and switch the toggle button ON to activate the bot.
c. Update the **To** field with the recipient's email.
d. Customize your alert message.

e. Click **Next** to save and proceed to Escalation script setup.

Alert

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

To: owner

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.

Hi, {firstName} :

Your time entry {timeEntryLink} for ticket {ticketId} with ticket summary {ticketSummary} has **no attached agreement**, while the client {timeEntryCompanyName} has an agreement with us.

Why am I receiving this message and why should I care?
Agreement profitability calculation is a very important KPI for each client that has an agreement with us, if the time entry is not attached to the agreement, it will inflate the agreement profitability accuracy.

How should I fix it?
Please click the {timeEntryLink} then attach an agreement. If you have any questions, please talk with your manager, thanks!

Preview Choose Template: Choose Template Save as a template

Microsoft Teams Channel

Previous **Next**

6. To edit Escalation:

a. Go to **Escalation**, hover over the **ellipsis ...** icon, and select **Edit**.

Escalation
Escalation Script

Edit
Edit Note
Delete

b. The default setting is weekly. Can be changed to **Day**, or **Month** as the cycle for escalation Time Frame.

Escalation

Escalation Script:
If bot keeps getting triggered, that means something is wrong with the process or people who's managing the process, you can remind the user of the consequence or escalate the management to make sure that the issue is being taken care of by someone.

> **Escalation Step 1**

If the bot triggered 3 times in a Week, send the following message to

> **Escalation Step 2**

If the bot triggered 6 times in a Week, send the following message to

> **Escalation Step 3**

If the bot triggered 9 times in a Week, send the following message to

+ Add New

Previous Finish

c. Define the **Steps**, **Threshold**, and **Messages** per escalation level.

- d. Click **Finish** when done.

Bot Activation

1. To activate the bot, refer to [Activating a Bot on the MSPbots App](#).

Related Integrations

- Active ConnectWise Manage
- Active Microsoft Teams