ConnectWise Manage Attached Agreement Prompter

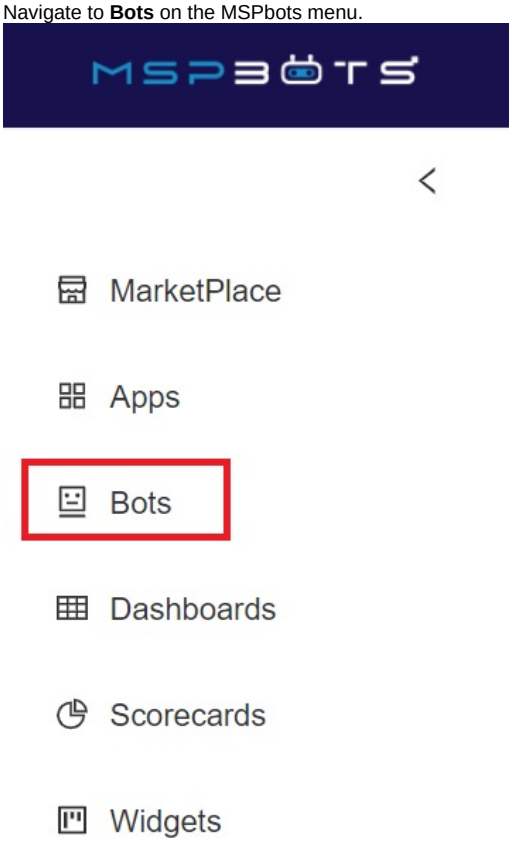
The ConnectWise Manage Attached Agreement Prompter is a bot that alerts the user when a time entry has no attached agreement. This article discusses the following:

How is this bot helpful?

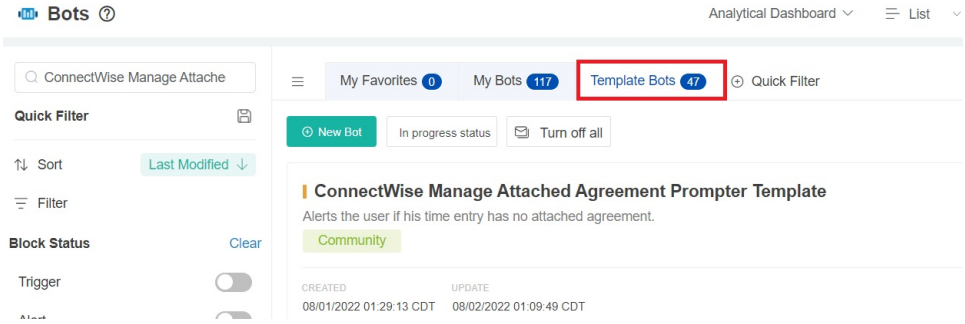
The ConnectWise Manage Attached Agreement Prompter ensures correct agreement profitability calculation for each client with an agreement with your company. If there were no agreement attached to the technician's time entry, there is a chance that the agreement profitability would be inflated and inaccurate.

How to Clone the ConnectWise Manage Attached Agreement Prompter Bot

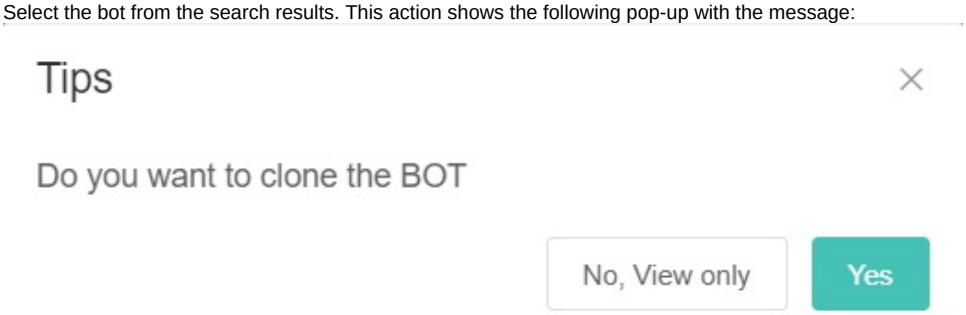
1. Navigate to **Bots** on the MSPbots menu.



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

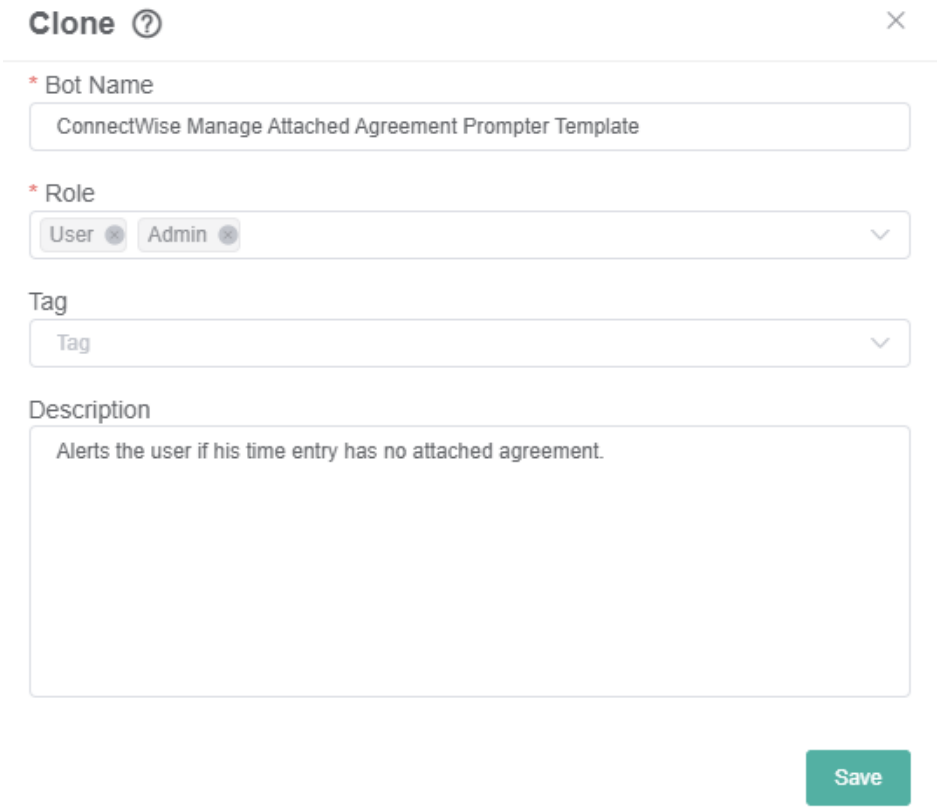


3. Select the bot from the search results. This action shows the following pop-up with the message:



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).

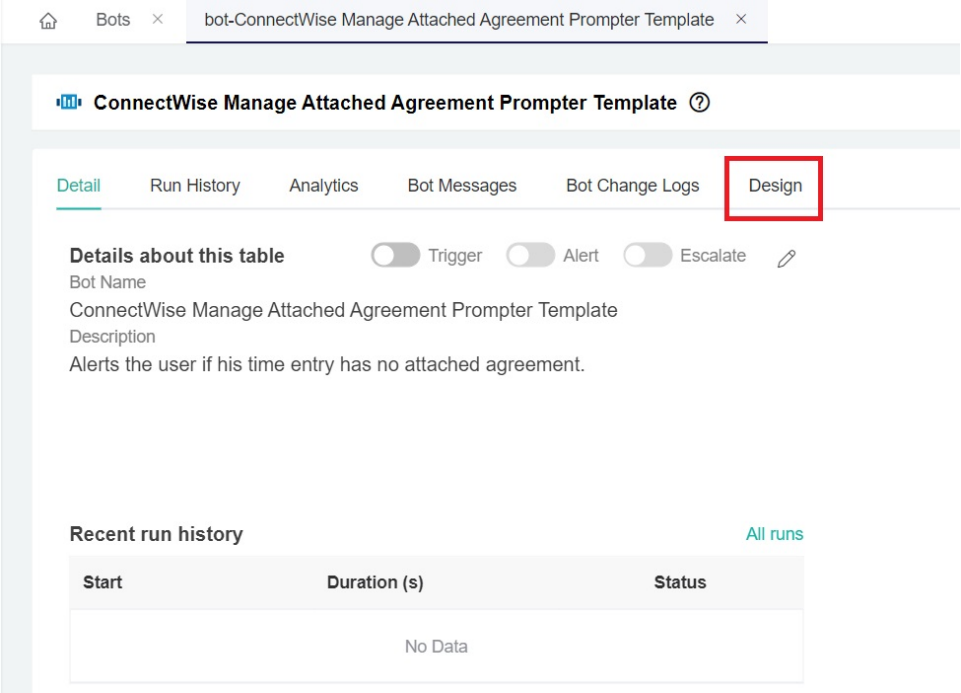


5. Edit the content of the **Role** field by selecting the appropriate role type.
6. Click the **Save** button to clone the bot. You can configure the bot later if it is necessary.

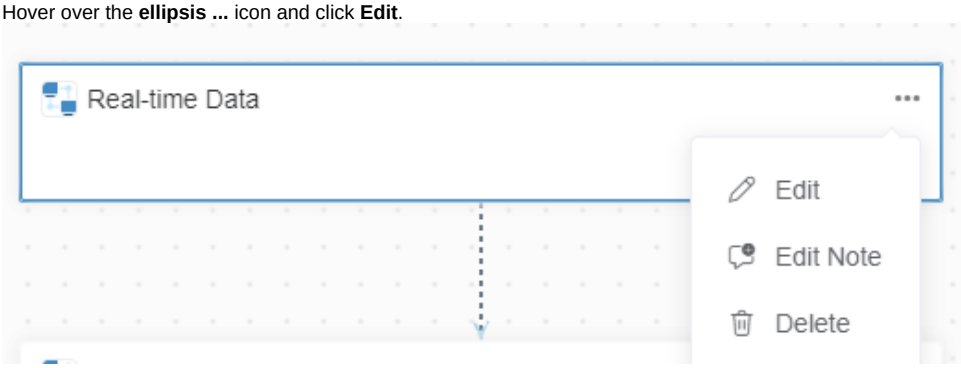
Bot Configuration

To configure the bot for ConnectWise Manage Attached Agreement Prompter:

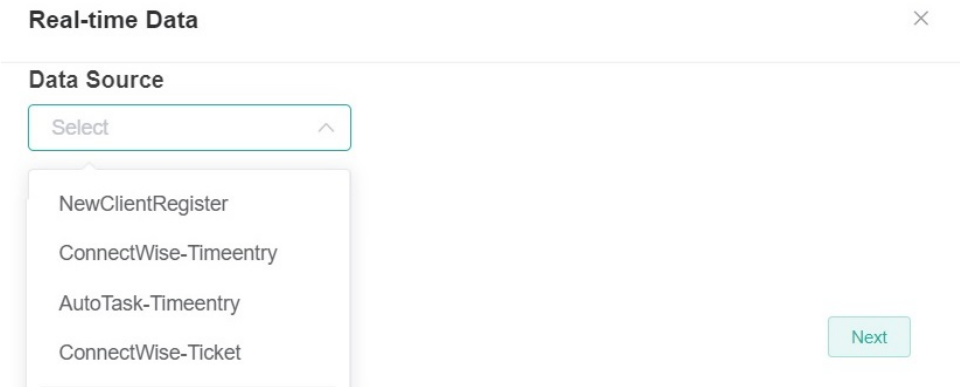
1. Go to **Bots** in the MSPbots app and open the ConnectWise Manage Attached Agreement Prompter (Company Name) bot.
2. Click the **Design** tab and select the configuration that you want to edit: **Real-time Data**, **DataFilter**, **Alert**, or **Escalation**.



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

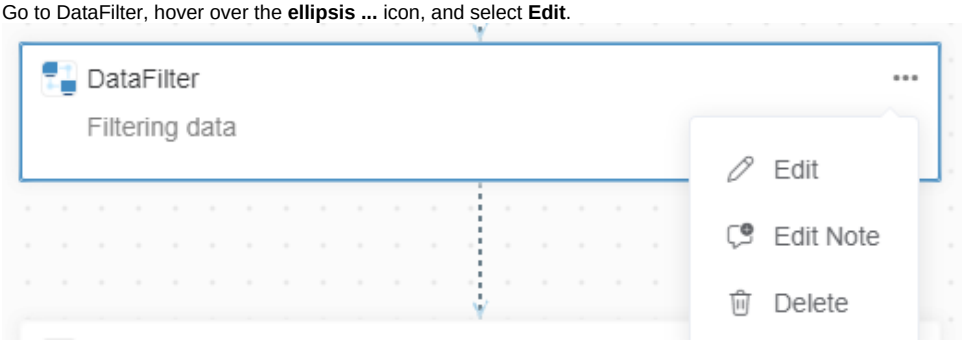


   b. Select an option for **Data Source** from the drop-down menu and click **Next**. This action continues to the editing of the DataFilter.

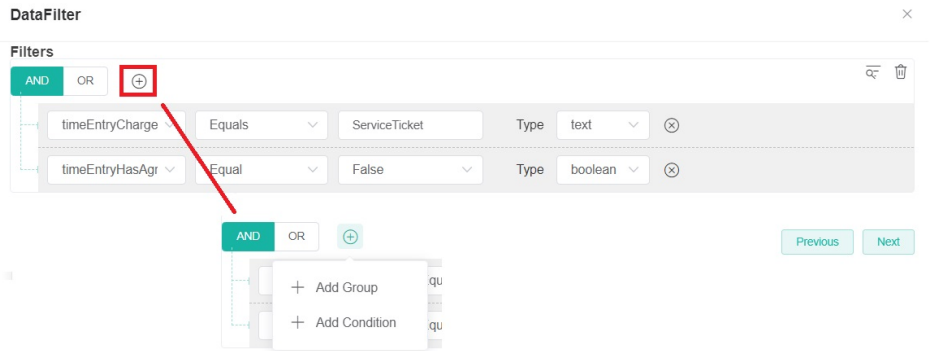


4. To edit Data Filter:

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.

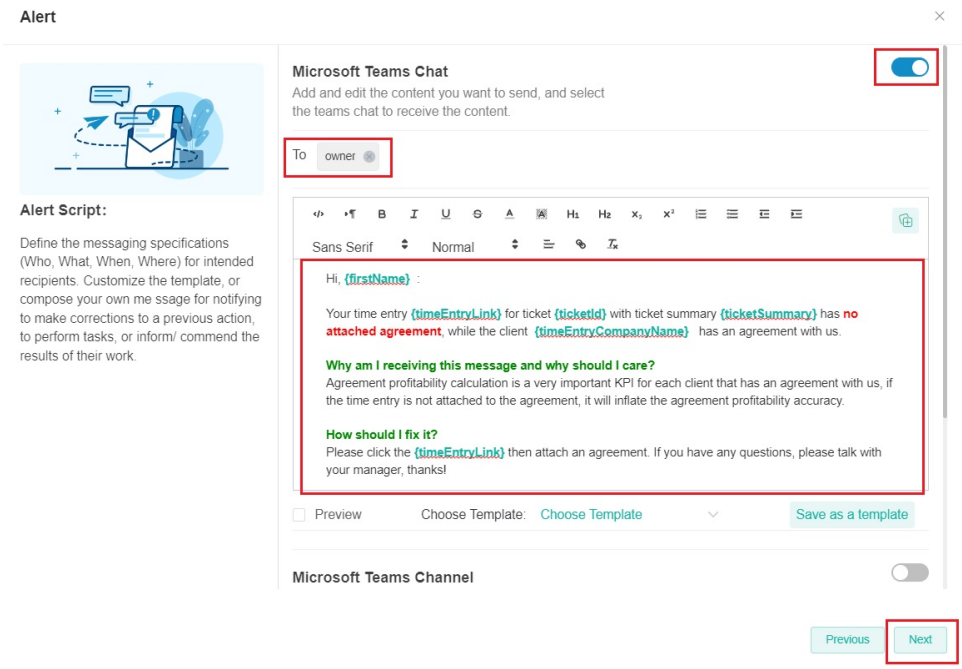


c. Click **Next** when done and ready to edit the Alert script. If you want to skip editing the Alert script message modal, click **Next** on the Alert window.

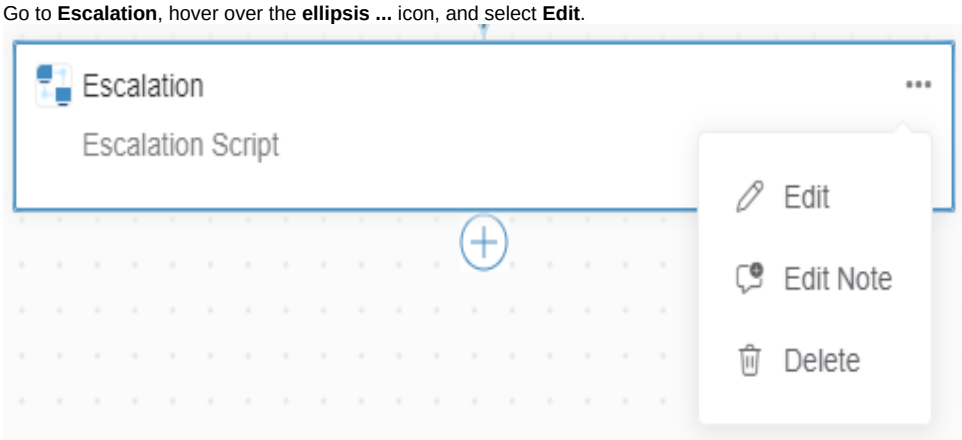
5. To edit the Alert script:
   a. Go to **Alert**, hover over the **ellipsis ...** icon, and select **Edit.**

   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.

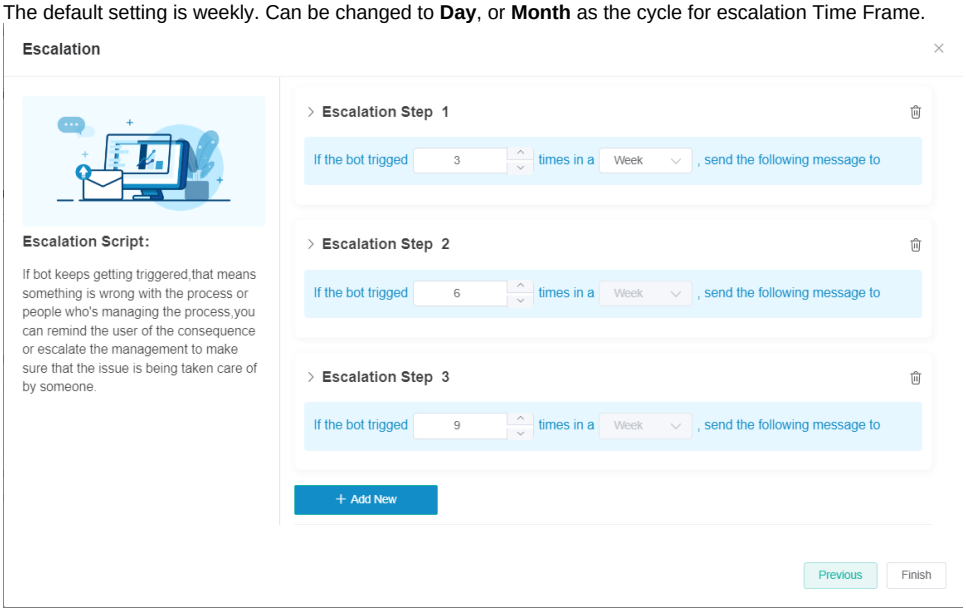
e. Click **Next** to save and proceed to Escalation script setup.



6. To edit Escalation:
   a. Go to **Escalation**, hover over the **ellipsis ...** icon, and select **Edit**.



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



   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