

Autotask Late Time Entry Alert Bot 3.0 Template

This article has the following information on Autotask Late Time Entry Alert Bot 3.0 Template:

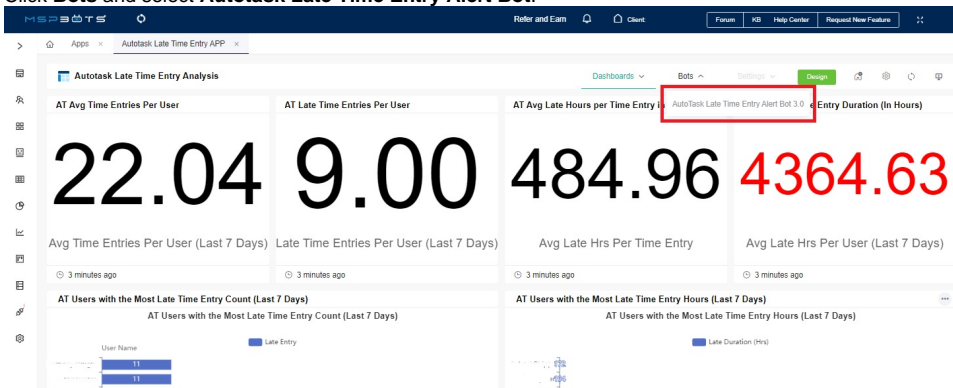
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How is this bot helpful?

Autotask Late Time Entry Alert Bot 3.0 Template sends real-time alerts to users whenever they log a late time entry. Enabling this bot automatically reminds technicians to charge time entries right after they finish working on a ticket. This improves KPIs, ensures the accurate computation of utilization rate and agreement profitability, increases the revenue and profit of the company, and maintains a positive collaboration between technicians.

How to configure the Late Time Entry Alert Bot

1. Go to [Apps](#) on the MSPbots menu.
2. Find the **Autotask Late Time Entry App** and click it to open the app.
3. Click **Bots** and select **Autotask Late Time Entry Alert Bot**.



4. Click **Design** to open the Real-time Data window.

5. Next, select **Autotask-Timeentry** as Data Source then click **Next**.

6. When the DataFilter window opens, do not change the default settings and click **Next**.

Field	Operator	Value	Type
endTimeCreateT	>	5	number
createDate	In	{current/0/days/da}	date
startTimeEndTim	>	0	number

7. When the Alert window opens, go to the text for the Alert message and review if it meets your requirements.

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.

Microsoft Teams Chat

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

To: owner

Insert a token

Dynamic Token

Search

Add dynamic tokens from data source and drill through used in this message.

Data source fields

- {ticketNumber}
- {email}
- {firstName}
- {lastName}

8. Next, make sure **{Ticket #}** uses the dynamic token "**{ticketNumber}**" instead of "**{ticketID}**". The "**{ticketNumber}**" link redirects to your Autotask PSA system. Below is an example of the message:

Realtime Bots Message Report For Teams

Drag a column header here to group its column

PDF Export CSV Export

message status create_date

Hi, Alexisl

Your recent time entry 237142 (Ticket # T20220826.0133) was logged 88 minutes late from: 2022-09-01 08:45 MDT to 2022-09-01 10:00 MDT , entered on 2022-09-01 11:28 MDT .

Why am I receiving this message and why should I care?

Do it when you still have a fresh memory of the things you did and the amount of time you spent on the ticket.
Missed billable hours result in less invoicing, less revenue, and profit.
Late time entries typically are not very accurate, which creates problems when we calculate the utilization and agreement profitability, we rely on those reports to make important decisions.
If the time entry is too late, other clients or employees might not be able to find out what you did when they need to.

Ready 2022-09-01 12:30 CDT

How should I fix it?


Here's a video guide on best practices in logging time entries in Autotask.

Sent to: [redacted] on [2021 11:30 MDT] Generated by AutoTask Late Time Entry Alert Bot 3.0 View your RealTime report.

9. Click **Next** to open the Escalation window.

10. If needed, modify the default **Escalation** setup. When done modifying or if there is no change, click **Finish**.

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

11. Lastly, go back to the Design tab and click **Save** to apply all the changes.

Detail

Run History

Analytics

Bot Messages

Bot Change Logs

Design

Reset

Clear

Save

How to activate the bot

To activate a bot, read the instructions on the [Activating a Bot on the MSPbots App](#) page.