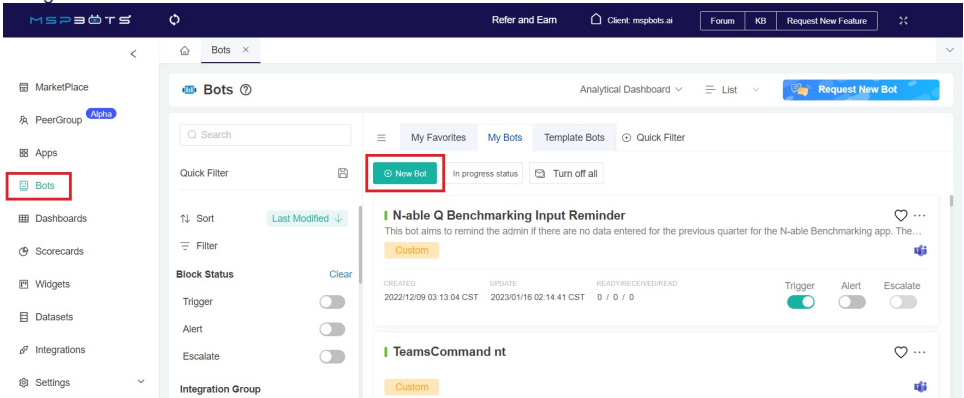


# Copy of How to Create a Bot

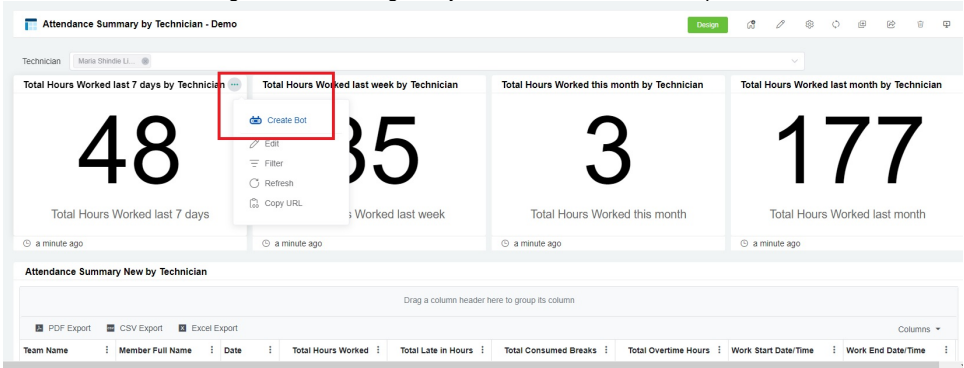
These are the steps for creating a bot in the MSPbots app.

## 1. Set up a new bot.

- a. Log in to the [MSPbots](#) app using your Office 365 account.
- b. Navigate to [Bots](#) on the left menu then click the **New Bot** button on the Bots screen.



You can also start creating a bot from a widget on your dashboard. Click the ellipsis button and select **Create Bot**.



- c. Choose how to start creating your bot. In the Create a new bot window, select **Start From Blank** or **Start From Bot Template**, then click on a bot type.
- **Start From Blank** - Select this option to create a new bot customized according to your needs.

Create a new bot ⓘ

Start From Blank

Starting from blank lets you create a totally custom flow to meet your needs.

Start From Bot Template

Fully functional bots make this the easiest way to start, plus you still can add customizations.

New Integration Trigger

Trigger

Real-time Data

Message Command

**New Integration Trigger**

- Select this bot type to create a bot triggered by integration events.

**Trigger**

- Select this bot type to create a bot triggered by specific conditions in datasets or widgets.

**Real-time Data**

- This type of bot is triggered by user-selected data sourced from a data synchronization source. For example, if the user sets up Connect Wise Manage-Ticket as the data source, a ticket created or updated in the Connect Wise Manage app and synchronized to MSPbots will trigger the bot.

Trigger or logic of real-time bots:

- i. The synchronization program actively retrieves the lastUpdatedTime from the database of the data source you have set up, every 3 minutes, for data updated in the past 3 minutes.
- ii. Put the newly obtained data into the message queue.

iii. Real-time Data bots will listen to this message queue, and if there are eligible tickets, the bot will be triggered.

**Message Command**  
- Select this option if you want to trigger the bot using commands from MS Teams or Slack.

- **Start From Bot Template** - Select this option to customize a fully functional bot available to your PSA.

Create a new bot ?

#### Start From Blank

Starting from blank lets you create a totally custom flow to meet your needs.

#### Start From Bot Template

Fully functional bots make this the easiest way to start, plus you still can add customizations.

< CW Halo Kaseya BMS No integration SmileBack Simplesat Teams TS

Q Search



#### Ticket Closing Below Budget - Tem...

This bot sends out a notification when a technician closes a ticket way below the budget. (The initial setting is that the ...



#### Ticket Percentage Budget Monitori...

This bot monitors the budget allocated per ticket and notifies the ticket owner if the actual hours reach a certain % of...



#### ConnectWise Late Time Entry Tea...

ConnectWise Late Time Entry Team Weekly Leaderboard display the team rank on a weekly basis



#### ConnectWise Late Time Entry User...

ConnectWise Late Time Entry User Monthly Leaderboard



#### Onboarding Ticket Created Via Portal



#### Onboarding Ticket Created Via em...

d. Next, do the following steps in the Create a new bot window:

**Create a new bot** ?

\* Bot Name  
Enter Bot Name 0/70

\* Role  
Admin + 1

Tag  
Tag

Description  
Description 0/500

Reselect Continue

- Enter a name in the **Bot Name** field.
  - Identify the **Role** that will have access to the bot.
  - Select one or multiple **Tags** to label the new bot you create.
  - Type a clear **Description** of the bot. (Recommended)
- e. Click the **Continue** button to open the tab with the details and settings for your new bot.

## 2. Set up the bot trigger.

a. Click the **Design** button on your bot's tab.

**My Bot - Follow up open ticket** ?

Detail Run History Analytics Bot Messages Bot Change Logs **Design**

**Details about this table** ☐ Trigger ☐ Alert ☐ Escalate

Bot Name  
My Bot - Follow up open ticket

Description  
This bot will alert me every time a ticket remains open after two weeks.


**Recent run history** [All runs](#)

Start	Duration (s)	Status
No Data		

This opens the Trigger window where you configure the trigger script.

- b. Start defining the trigger by selecting **Widget** or **Dataset**, and your PSA.

Trigger



**Trigger Script:**  
Define the Bot and the conditions of when it will be executed.

I want the bot to trigger when

Widget Autotask / Aging - Autotask

meet following criteria:

AND OR

I want the bot to run base on this schedule:

Starting at 08/04/22 09:54:38 America/New\_York

Repeat every 1 Hour

Repeat every 1 minutes

from hour to on day of week Select

Advanced Scheduler

Setting →

Next

- c. Next, go to the **meet following criteria** section and define the criteria for triggering the bot. Hover over the plus **+** icon and click **+Add Group** or **+Add Condition**.

meets the following criteria:

AND OR +

+ Add Group

+ Add Condition

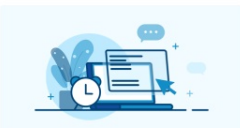
I want t this schedule:



If you want to preview the data, click the **Data Inspector** icon.

- d. Go to the **I want the bot to run based on this schedule** section.
- i. **Schedule** - Set the time and frequency for running the bot.

Trigger



I want the bot to trigger when

Widget Select

meets the following criteria:

AND OR +

Select Fields

I want the bot to run based on this schedule:

America/Chicago

Starting at 2023-12-07 11:30:40

Repeat every 1 Hour

Repeat every 1 minutes

from hour to on day of week Select

Advanced Scheduler

Setting →

Finish

- ii. **Time Zone** - Select the time zone to be used by this bot to send messages.

Please note that when you clone a Trigger bot, the cloned Trigger bot will inherit the time zone value from the original Trigger bot. If you are in a different time zone and you want the bot to run in your time zone, you will need to specify the time zone for the Trigger block of the cloned bot.

- iii. **Settings** - Click **Settings** to select which holidays the bot should not send messages on. Holidays are custom-defined in the Holidays section of System in your Settings. For more information, please refer to: [How to Configure the Holidays List in the MSPbots App](#).

### 3. Set up Advanced Scheduling (Optional)

- To set up advanced scheduling, scroll down to the **Advanced Scheduler** section on the Trigger screen.
- Click the **Setting** link to open the Advanced Scheduler window.
- On the Advanced Scheduler window, configure the bot to alert in Minutes, Hours, Day, Month, or Year, then click **Save**.

d. Click the **Next** button to continue to the steps for defining the bot alert script.

## 4. Define the bot alert script.

a. Start by activating the channel where the bot will send the alert message. Click the toggle for any of the following to switch the channel ON:

- **Microsoft Teams Chat**
- **Microsoft Teams Channel**
- **Email**
- **Web Message**
- **Slack Chat**
- **Slack Channel**

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.

**Microsoft Teams Private Chat**

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

☐ Hide the message footer

**Microsoft Teams Public Channel**

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

**Email**

Add and edit the content you want to send, and select the E-mail to receive the content.

☐ Hide the message footer

**Web Message**

Add or edit the content you want to display on the browser popup when the bot trigger conditions are met.

**Slack Chat**

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

**Slack Channel**

Add and edit the content you want to send, and select

Previous

Next

You can choose more than one channel based on your needs.

b. Set up the alert message.

For example, to set an email alert:

i. Click the **Email** toggle switch. This will show the email fields and the checkbox for **Hide the message footer**.




- ii. (Optional) Select the **Hide the message footer** checkbox to remove the additional information from the bottom of the email message.

- iii. Select a sender from the **From** dropdown list.

- iv. Next, click the **To** field and select the recipients from the **From Dataset Field**, **From Drill Through**, or **From User List** fields. You can also click **CC** or **BCC** to add recipients to these fields.

**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.

**Email**

Add and edit the content you want to send, and select the E-mail to receive the content. ☐ Hide the message footer

From

To  **CC** **BCC**

From Dataset Field

No data source, or no optional fields.

From Drill Through

No data source, or no optional fields.

From User List

☐


☐

☐ Preview Choose Template:

**Web Message** ☐

- v. Type the **Subject** of the email.

**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.

**Email**

Add and edit the content you want to send, and select the E-mail to receive the content. ☐ Hide the message footer

From

To  **CC** **BCC**

**Subject**

**B I U S** **Text** **Link** **Image** **Table** **Quote** **Code** **More**

11pt

this is test template {{email}}.123


P 6 WORDS

☐ Preview Choose Template:

**Web Message** ☐

vi. In the section for the email message, compose a custom message for the alert message.

#### 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.

**Email**

Add and edit the content you want to send, and select the E-mail to receive the content.

☐ Hide the message footer

From: [Select From Address](#)

To: [Select Recipient](#) CC BCC

Subject: [Enter a subject](#)

**Formatting toolbar:** Bold, Italic, Underline, Strikethrough, Text color, Background color, Link, Unlink, Bulleted list, Numbered list, Indent, Outdent, Quote, Unquote, Undo, Redo, Text size (11pt), and a token icon.

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

0 WORDS


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

**Web Message**

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

You can use the **Insert a Token** button to select data to include in the message. Formatting options are also available to highlight message sections.

#### 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.

**Email**

Add and edit the content you want to send, and select the E-mail to receive the content.

☐ Hide the message footer

From: [Select From Address](#)

To: [Select Recipient](#) CC BCC

Subject: [Enter a subject](#)

**Formatting toolbar:** Bold, Italic, Underline, Strikethrough, Text color, Background color, Link, Unlink, Bulleted list, Numbered list, Indent, Outdent, Quote, Unquote, Undo, Redo, Text size (11pt), and a token icon.

**Insert a token** button is highlighted above the token icon in the toolbar.

0 WORDS

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

**Web Message**

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

vii. Select the **Preview** checkbox to show a preview of your message.

#### 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.

Subject

Rich text editor toolbar with options for bold, italic, underline, strikethrough, link, unlink, list, indent, quote, code, undo, redo, and font color. The font size is set to 11pt.

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

P

32 WORDS

☒ Preview

Choose Template: [Choose Template](#)

[Save as a template](#)

Light Mode



Dark Mode

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

##### Web Message

Add or edit the content you want to display on the browser popup when the bot trigger conditions are met.

##### Slack Chat

Add and edit the content you want to send, and select

[Previous](#)

[Next](#)

When **Preview** is selected, the toggle for **Light Mode** or **Dark Mode** also appears. Light Mode is enabled by default. Click the toggle to apply Dark Mode to your email.

#### 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.

Subject

Rich text editor toolbar with options for bold, italic, underline, strikethrough, link, unlink, list, indent, quote, code, undo, redo, and font color. The font size is set to 11pt.

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

P

32 WORDS

☒ Preview

Choose Template: [Choose Template](#)

[Save as a template](#)

Light Mode



Dark Mode

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

##### Web Message

Add or edit the content you want to display on the browser popup when the bot trigger conditions are met.

##### Slack Chat

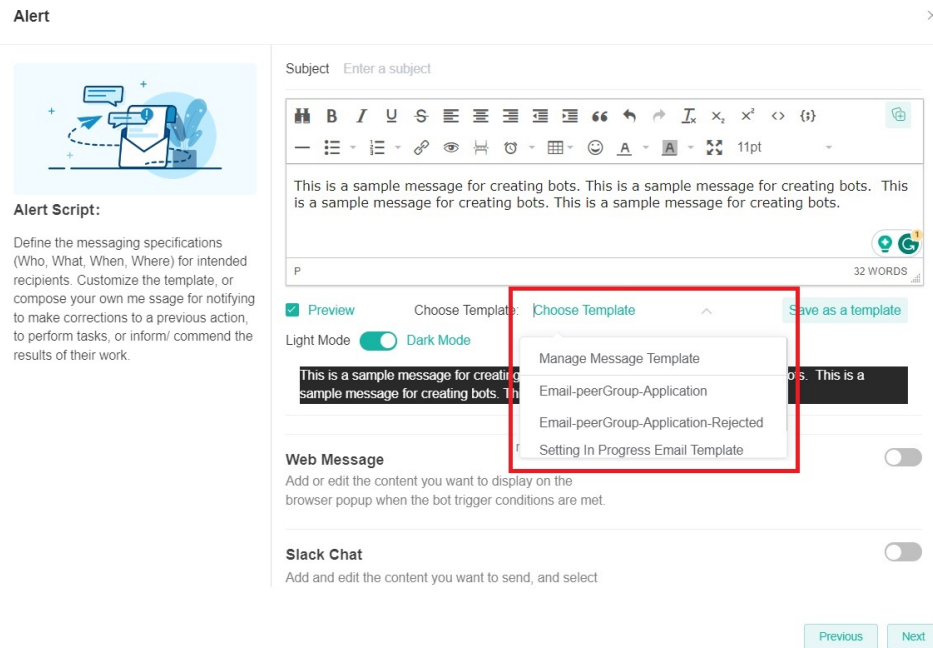
Add and edit the content you want to send, and select

[Previous](#)

[Next](#)

viii. **Next**, click **Choose Template** and select the message template you want to use.

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.

Subject Enter a subject

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

32 WORDS

Preview Choose Template: Choose Template Save as a template

Light Mode Dark Mode

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

Web Message

Add or edit the content you want to display on the browser popup when the bot trigger conditions are met.

Slack Chat

Add and edit the content you want to send, and select

Previous Next

Selecting a template automatically changes the message in the message box.

You can also save your message and turn it into a template.

1. Click **Save as a template**.
  2. Type a **Template Name** and select a **Template Type**.
  3. Select **View After Adding** to add your template in Choose Template dropdown menu.
  4. Click **Add** to save the current message as a message template.
- ix. Click **Next** when done. This action takes you to the escalation script setup.

For instructions on sending alert messages to MS Teams, refer to the article [How to set up MSPbots to send messages to a Microsoft Teams channel](#).

For instructions on sending alert messages to Slack, refer to the article [Slack Integration Setup](#).


## 5. Set the escalation script.

You can send the escalation message to a manager or multiple recipients and add escalation steps based on your requirements.

- a. Select a **Time Frame** for the escalation cycle, e.g., **Day**, **Week**, or **Month**.
- b. Define the escalation steps by selecting an Escalation Threshold.
- c. Write the Escalation message and click the **+ Add Message** button to create another message.
- d. Click the **Finish** button when done.

For example, selecting **Week** for Time Frame and **3** for Escalation Threshold will send the escalation message on the third time the bot was triggered in the week.

### 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.

Subject

**\* Template Name**

**\* Template Type**

☐ View After Adding

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.

☒ Preview Choose Template:

Light Mode ☒ Dark Mode

This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots. This is a sample message for creating bots.


**Web Message** ☐

Add or edit the content you want to display on the browser popup when the bot trigger conditions are met.

**Slack Chat** ☐

Add and edit the content you want to send, and select

### Escalation



**Escalation Script:**

Define the conditions of WHAT, WHEN, FROM/ TO, and contents of the message that will be sent to a predetermined escalation path, informing the recipient/s of any failure to make corrections according to previously executed Bots.

**Time Frame** ⓘ

Set a cycle for the escalation program.

**Define Escalation Steps**

Setting the upper limit value of the trigger frequency in the set cycle times, so as to determine whether or not to proceed with the program.

▼ **Escalation Step 1**

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

**Escalation Threshold**

Select send to: User

- **Escalation** - Switch this ON to activate the escalation setup.

Detail

Run History

Analytics

Bot Messages

Design

Details about this table

Bot Name

Monitoring [Aging - Autotask] for

Description

This bot is generated for monitoring [Aging - Autotask] for

Trigger

Alert

Escalate