

# Optimizing ConnectWise Workflows with CrushBank Automations

## ConnectWise Workflows: How CrushBank turns them into cost savings

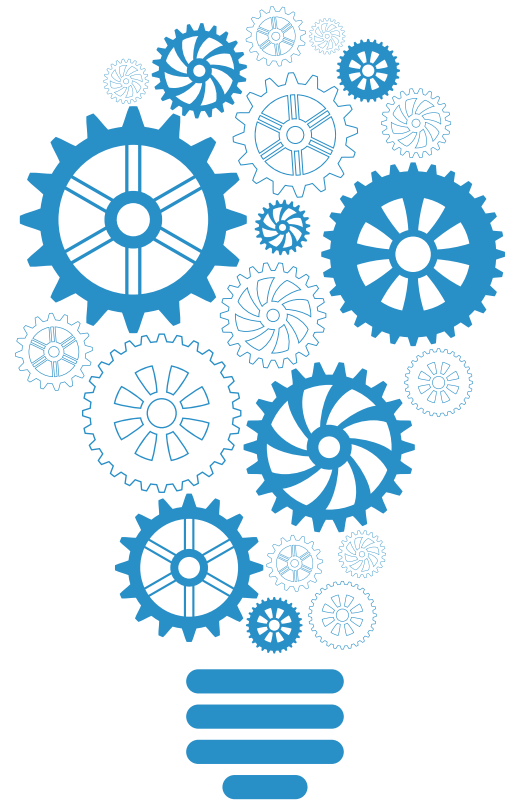
ConnectWise workflows have been a tool to help manage processes and actions. IT support makes use of workflows to fill gaps and set up alerts so tasks do not fall through the cracks. They play a vital role in client success and ticket management. The issue with workflows is the human element of classifying tickets. If tickets were automatically classified and prioritized, now we have a powerful automation tool designed to be a cost saving.

However, the effectiveness of these workflows depends entirely on accurate ticket classification and prioritization—this is where **CrushBank's AI-driven automation** makes a significant impact. Unlike open-source AI with only 50% accuracy, **CrushBank customizes classifications and priorities** to ensure precision and reliability.

Without **CrushBank's SmartClassifier, prioritizer and auto-budgeting**, workflows become less effective. When ticket classification is handled manually, the risk of misrouting, wasted time, and frustrated engineers increases—ultimately leading to client dissatisfaction.

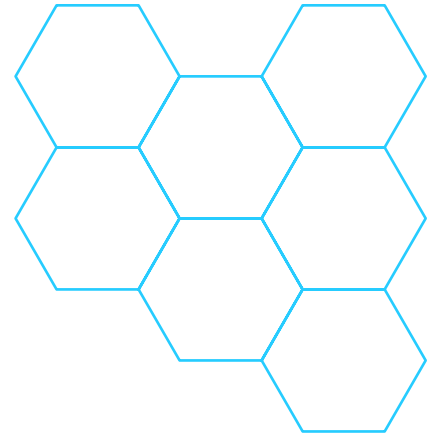
CrushBank transforms ConnectWise workflows into **highly accurate, automated systems**, saving countless hours for techs and dispatchers. By ensuring tickets are categorized correctly from the start, workflows become a true cost-saving asset for your business.

**CrushBank Automations save you money by eliminating a manual task that an average takes two minutes – while delivering greater accuracy than a human.**



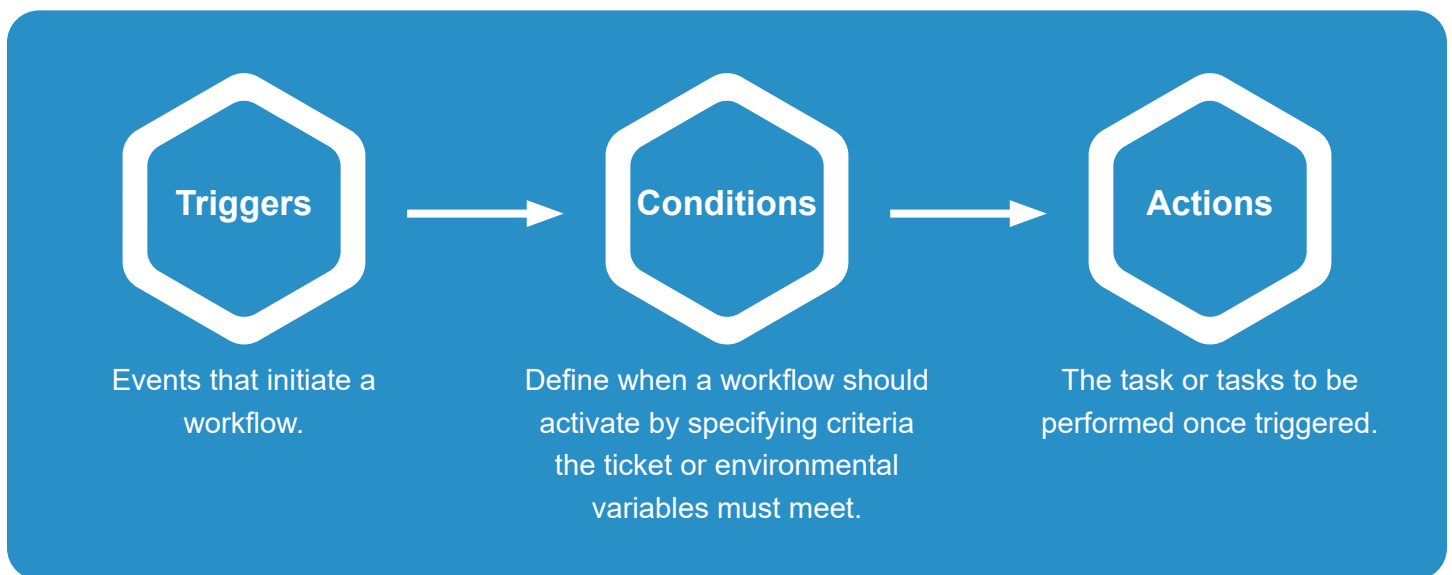
# Understanding ConnectWise Workflows

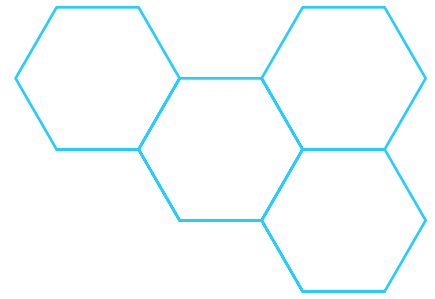
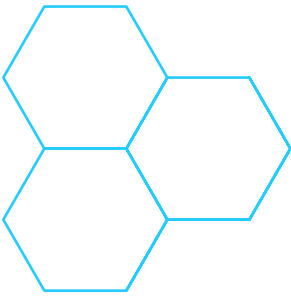
ConnectWise workflows are structured automation sequences designed to streamline tasks and ensure consistency in IT service management, especially in managing service tickets. For MSPs, workflows provide substantial benefits including reduced ticket response times, improved technician productivity, enhanced service consistency, and better compliance with SLAs. Despite their considerable potential to enhance efficiency, workflows are often undermined by poor quality or incomplete ticket data.



## Workflow Structure

A workflow rule combines three critical components: triggers, conditions and actions. The trigger initiates the workflow when certain predefined conditions are met, while the action is the specific task or set of tasks performed as a result. Clearly defining these triggers, conditions and actions ensures tasks are automatically executed accurately and efficiently, reducing the likelihood of human error and increasing overall productivity.





## Triggers, Conditions and Actions

A trigger could be an event such as the creation of a new ticket, a change in ticket status, or a scheduled time interval. For instance, when a new ticket is created, this event typically initiates actions like assigning the ticket automatically to a technician, updating its priority, or notifying relevant personnel via email. Another example might be a status change trigger, where changing a ticket's status from "pending" to "in progress" could automatically alert the assigned technician or customer.

Not every workflow is triggered by a new event. Some run regularly, for example, every 30 minutes, to monitor ticket progression or resolution time. For instance, instead of flagging tickets based purely on elapsed time, workflows can consider budgeted hours or actual work needed, leading to more precise actions.

Conditions work through logical criteria that evaluate ticket attributes. When a trigger event occurs, ConnectWise evaluates whether a ticket matches all defined conditions. Only when these conditions are fully met will the workflow execute its associated actions.

The actions triggered by the workflow can vary widely and include tasks such as automatically escalating overdue tickets, generating and sending reports to management, initiating scripts that resolve routine issues remotely, or even closing tickets after a resolution is confirmed. These automated actions significantly enhance operational efficiency by minimizing the need for manual oversight and intervention, allowing technicians to focus more on complex and high-priority tasks.

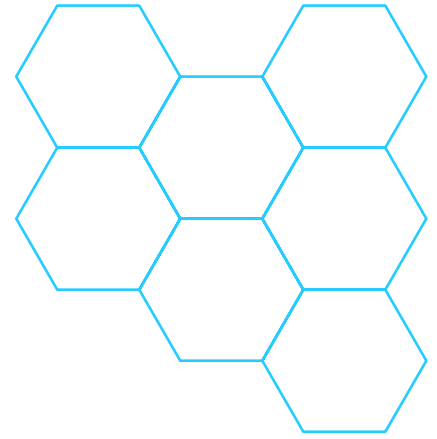
Workflow actions can include steps such as:

- Changing ticket priority.
- Moving tickets between service boards.
- Assigning tickets.
- Sending notifications.
- Creating follow-up activities or tasks.

However, well defined triggers, conditions and actions alone aren't sufficient. For workflows to be efficient, they must be built on accurately classified and detailed ticket information – such as the issue type, subtype, and item; the ticket priority; the time that should be budgeted for the work needed.

# How CrushBank Helps

CrushBank optimizes workflows by using machine learning based on the MSP's own ticket history.



## SmartClassifier

Automatically assigns accurate ticket classifications (type, subtype, item).



## Prioritization

Identifies urgency and impact, preventing incorrect prioritization.



## Auto-Budgeting

Accurately estimates required hours, allowing precise workflow actions.

**Example:** When a new ticket is created, CrushBank SmartClassifier automatically identifies its type, subtype, and item. This enables precise actions such as assigning it to the correct technician or service board, adjusting priorities, or triggering automated notifications.

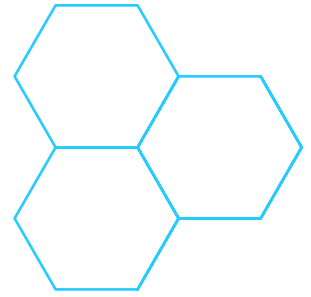
CrushBank ensures actions occur efficiently by providing accurate, automated classifications. Misclassifications lead to incorrect actions, wasted resources, and delayed resolution.

CrushBank eliminates these risks, improving workflow effectiveness.

Without CrushBank's SmartClassifier, Prioritizer and Budgeter, workflows might trigger because of incorrectly classified tickets, leading to misrouted work, wasted time, and frustrated engineers.

By ensuring tickets are categorized accurately from the start, CrushBank makes ConnectWise workflows more efficient and reliable.

# Ticket Templates & Task Automation



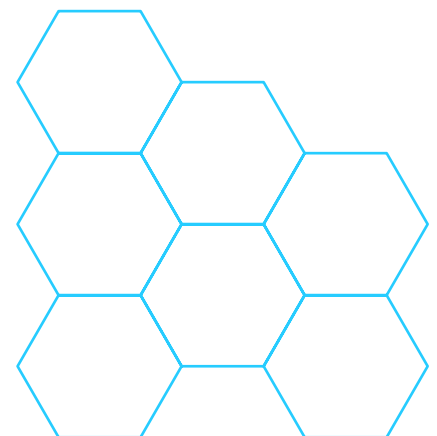
ConnectWise ticket templates are predefined ticket configurations used to standardize and streamline the creation of service tickets. They help ensure consistency, efficiency, and accuracy when managing recurring or common service requests.

- **Ticket Templates:** Standardized formats for tickets that pre-fill necessary details (e.g., “New User Setup”).
- **Tasks in Tickets:** Workflows can assign a sequence of tasks that must be completed before closing a ticket.

**Example:** A New User Setup ticket template can automatically:

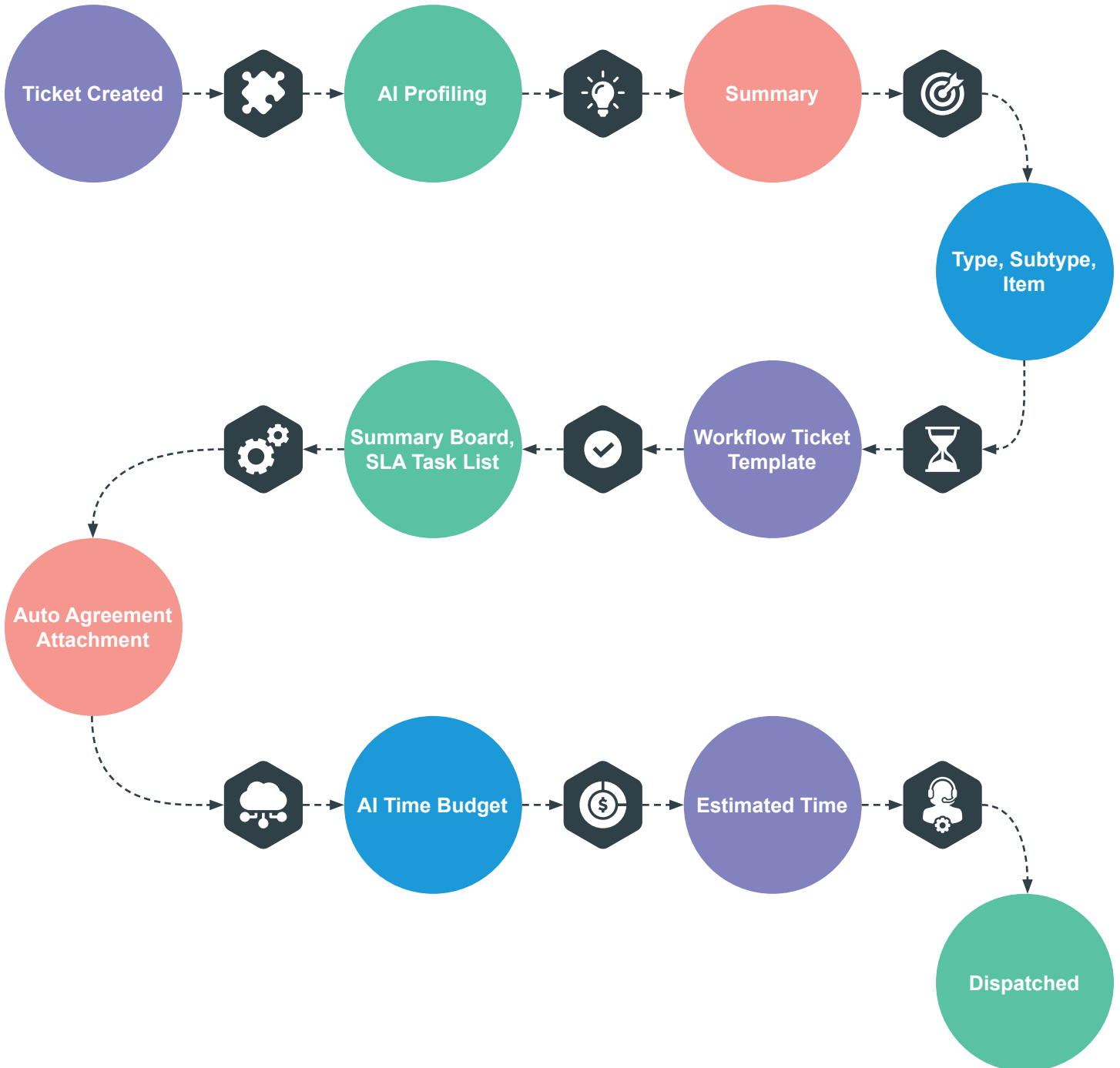
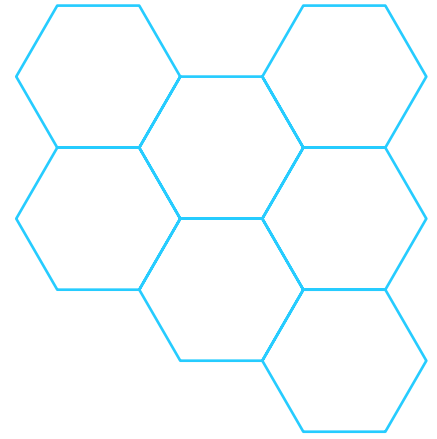
- Assign setup steps (e.g., create an email account, provision access).
- Require technicians to mark tasks as completed.

CrushBank improves these processes by ensuring tickets follow the right template by detecting ticket context and applying the correct format automatically. It avoids confusion and errors by pre-filling details accurately—technicians don’t have to adjust templates manually.



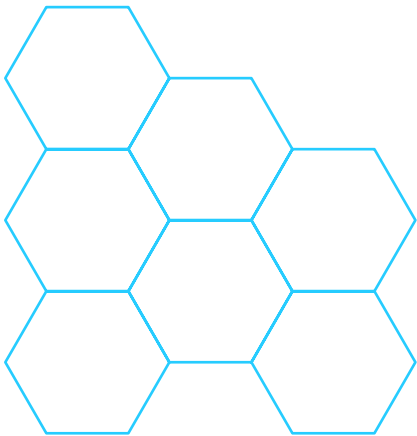
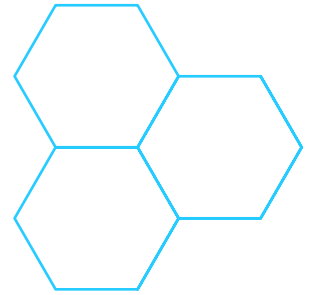
# Example of a Set of Workflows: The Virtual Dispatcher

The **Virtual Dispatcher** is a set of workflows that streamline ticket management by eliminating the need for manual dispatching. It leverages machine learning to **analyze, classify and prioritize tickets** with high accuracy, ensuring tickets are handled efficiently from creation to resolution.



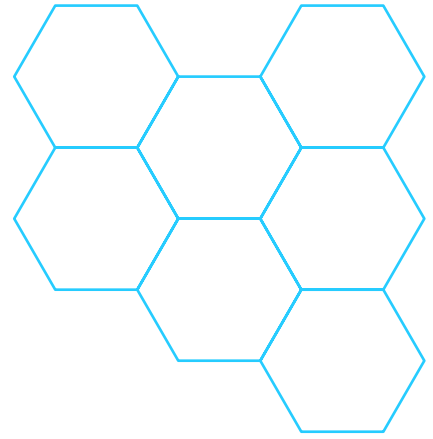
## How It Works

1. **Ticket Created** – A new ticket enters the system.
2. **AI Profiling** – The system automatically categorizes the ticket using CrushBank machine learning based on historical tickets.
3. **Summary Generation** – CrushBank generates a structured summary of the issue.
4. **Time Budgeting** – CrushBank estimates the time required for resolution.
5. **Auto Agreement Attachment** – Additional details, such as ticket type, subtype, and related configurations, are automatically linked through a workflow.
6. **Automated Dispatching** – The ticket is assigned to the appropriate technician based on skill set, workload, and SLA urgency.



## Key Benefits

- **Reduces Manual Workload** – Automates triage and dispatching, freeing up resources.
- **Ensures Faster Response** – Assigns tickets to the right technician immediately.
- **Improves SLA Compliance** – Tracks and escalates tickets based on urgency.
- **Supports Dynamic Workflows** – Triggers actions such as sending emails, running scripts, or changing ticket statuses.



## Why ConnectWise Workflows Need CrushBank

While ConnectWise workflows help automate IT service management, their effectiveness is only as good as the data they rely on. If tickets are misclassified, mis-prioritized, or routed incorrectly, workflows become bottlenecks instead of time-savers. CrushBank ensures that every workflow starts with the right inputs—accurate ticket type, priority, and budget—so that automation improves efficiency instead of creating extra work.

