

**Microsoft Exchange Online**

January 4th, 2023

### Alert when Users' Mailboxes are Reaching Quota

When any user's mailbox quota reaches [\(percent\)](#) percent capacity, [create a ticket](#) to resolve the issue before the user is unable to send and receive email.

Exchange Online Stewart's Favorites

SOARING

**Rewst** Unpacked

July 6th, 2023

### OpenAI Ticket Categorization

When a new [PSA](#) ticket is created, use [OpenAI](#) to determine the best ticket categorization to assign to the ticket then update the ticket note with the changes. This supports both OpenAI and Microsoft's GPT...

CW Manage DattoPSA Kaseya BMS OpenAI PSA

Stewart's Favorites

165 SOARING

**Rewst**

January 10th, 2023

### Add Rewst Form Link to Tickets

When a ticket comes in with a [\(subtype\)](#), and Item of [\(item\)](#), links to the Rewst Form.

CW Manage DattoPSA Kaseya

Stewart's Favorites User Manag

126 SOARING

**Pax8**

September 25th, 2022

### Report on Unused M365 Licenses

Generate a report on unused M365 licenses that can be sent to Pax8 via a PSA ticket. Include [hyperlinks in the report](#) to update the purchased quantity to match the report.

Stewart's Favorites

SOARING

**Rewst**

September 25th, 2023

### Document M365 Environment

For all M365 enabled-orgs, document details such as Active Users, Guests, Licences, Privileged Group Information and more!

Documentation IT Glue Microsoft Stewart's Favorites

116 SOARING

**Microsoft Graph**

September 25th, 2023

### Clean up Global Address Users

List all disabled users in Microsoft Graph and remove them from the Global Address List.

Microsoft Stewart's Favorites

112 SOARING

**Rewst** Unpacked

**Microsoft Graph**

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# Stewart's 30 Favorite Crates

A guide to shortening time to value with pre-built automations



## Overview

This guide explores 30 of our favorite pre-built automations, known affectionately as Crates. Our Customer Success and ROC teams carefully selected these Crates based on their ease of implementation, value delivered, and popularity within our customer base. Our teams then categorized them into logical groups like security, ticketing, alerting, and reporting. Installing these Crates during your Rewst onboarding process can shorten your time to value.

## How to use this guide

Read through the guide, taking note of Crates you could quickly implement into your daily operations. Then, collaborate with your Customer Success Manager to prioritize Crates based on your MSP's needs. We'll work together to "unpack" these Crates and get them running in your Rewst environment.

Leverage this guide in your new customer journey and take advantage of Crates. Realize value out of the gate while you're completing onboarding and training.

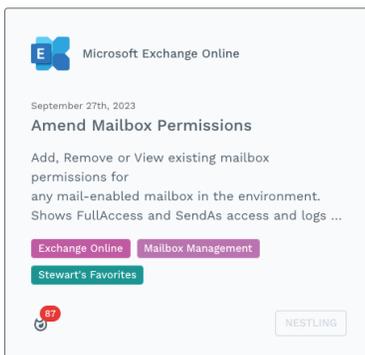
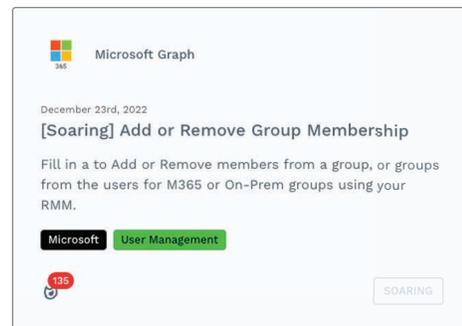
## Security Crates

### 1. Add or Remove Group Membership

**What it Does:** Efficiently manages group memberships for Microsoft 365 and On-Prem environments using your RMM.

**Integrations:** Microsoft Graph

**Why MSPs love it:** Fundamental for maintaining a secure IT infrastructure as it allows for streamlined group management.



### 2. Amend Mailbox Permissions

**What it Does:** Adds, removes, or views 'FullAccess' and 'SendAs' mailbox permissions, ensuring audited changes.

**Integrations:** Microsoft Exchange Online, Halo PSA, ConnectWise PSA, Datto PSA, Freshdesk, Kaseya BMS

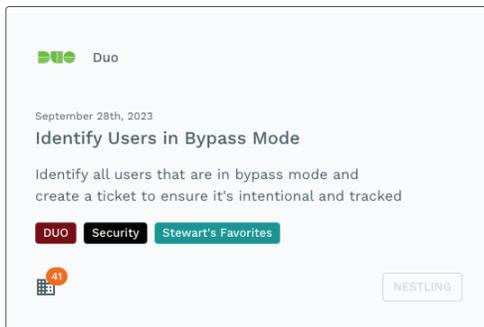
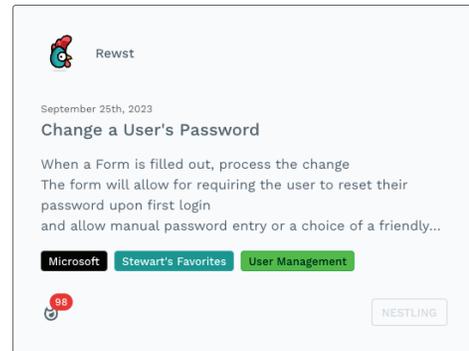
**Why MSPs love this Crate:** Enhances mailbox security, simplifying permission management within the MSP environment.

### 3. Change a User's Password

**What it Does:** Simplifies user password management through a form-driven interface.

**Integrations:** Environment dependent

**Why MSPs love it:** Facilitates controlled password management, ensuring secure and documented password resets.



### 4. Identify Users in Bypass Mode

**What it Does:** Ensures identification of users in Duo bypass mode, logging tickets for verification.

**Integrations:** Duo, Halo PSA, ConnectWise PSA, Datto PSA, Freshdesk, Kaseya BMS

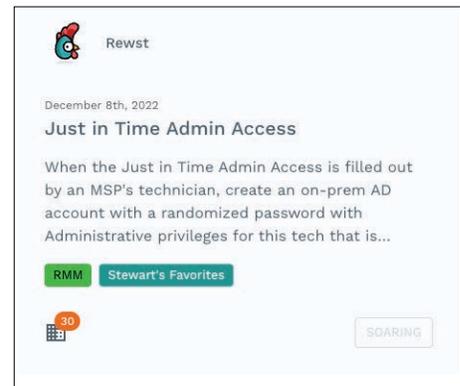
**Why MSPs love it:** Strengthens security measures, providing audit trails for compliance and reducing manual errors.

### 5. Just in Time Admin Access

**What it Does:** Generates, activates, and deactivates on-prem Active Directory accounts with administrative privileges.

**Integrations:** Environment dependent

**Why MSPs love it:** Enhances security by maintaining control and accountability of administrative users.

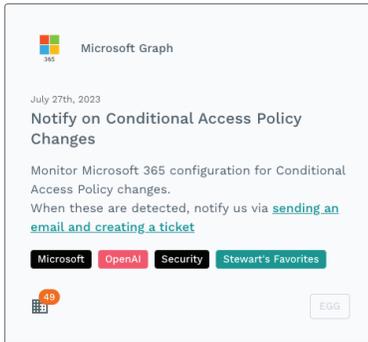


### 6. Microsoft 365 Quarantine Email Release

**What it Does:** Automates releasing emails from Microsoft 365 quarantines and updates associated tickets.

**Integrations:** Microsoft Exchange Online, Halo PSA, ConnectWise PSA, Datto PSA, Freshdesk, Kaseya BMS

**Why MSPs love it:** Streamlines email management, ensuring controlled handling of quarantined emails.



## 7. Notify on Conditional Access Policy Changes

**What it Does:** Monitors changes in Microsoft 365 Conditional Access Policies, providing notifications via email or tickets.

**Integrations:** Microsoft Graph, OpenAI

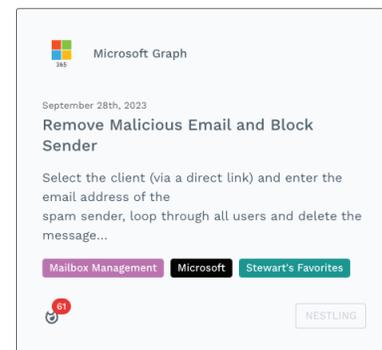
**Why MSPs love It:** Enables quick response to security risks, enhancing policy management. OpenAI enhances notification content for efficient policy management.

## 8. Remove Malicious Email and Block Sender

**What it Does:** Deletes spam emails, blocks senders, and updates tickets.

**Integrations:** Microsoft Graph

**Why MSPs love it:** Provides a proactive solution to spam, ensuring transparent and accountable actions.



## 9. Reset Locked Accounts

**What it Does:** Streamlines resetting passwords and unlocking accounts for locked-out users.

**Integrations:** Environment dependent

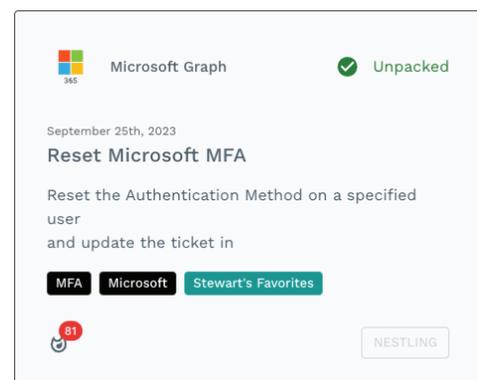
**Why MSPs love it:** Enables quick, documented resolution of user lockouts.

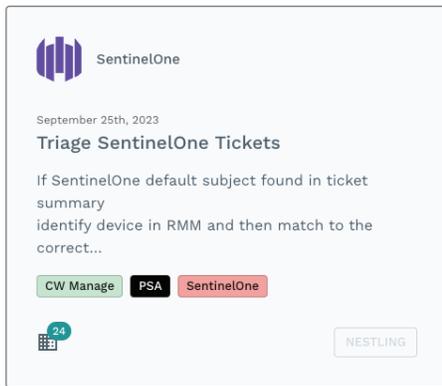
## 10. Reset Microsoft MFA

**What it Does:** Facilitates rapid resolution of user lockouts by resetting passwords and unlocking accounts.

**Integrations:** Microsoft Exchange Online, Halo PSA, ConnectWise PSA, Datto PSA, Freshdesk, Kaseya BMS

**Why MSPs love it:** Speeds up assistance for locked-out users, ensuring compliance with protocols.





## 11. Triage SentinelOne Tickets

**What it Does:** Matches SentinelOne alerts to the correct company in ConnectWise PSA (Manage).

**Integrations:** SentinelOne, ConnectWise PSA

**Why MSPs love it:** Speeds up response to security alerts, streamlining incident tracking and reporting.

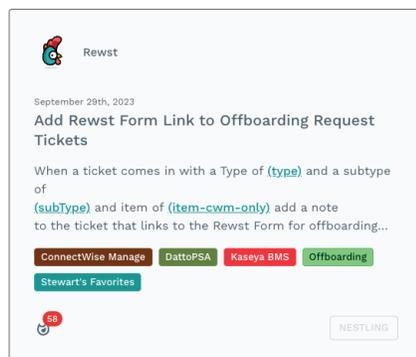
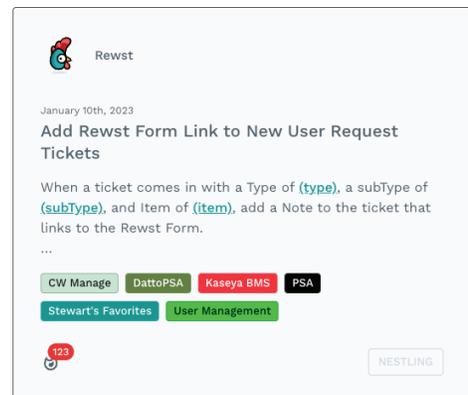
## Ticketing Crates

### 12. Add Rewst Form Link to New User Request Tickets

**What it Does:** Adds a note with a Rewst Form link to specified tickets.

**Integrations:** Halo PSA, ConnectWise PSA, Datto PSA

**Why MSPs love it:** Automates adding essential information to tickets, ensuring consistent documentation.

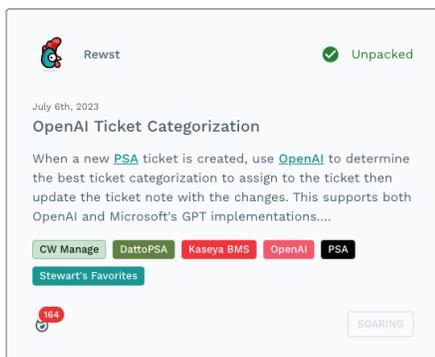


### 13. Add Rewst Form Link to Offboarding Request Tickets

**What it Does:** Adds a note to PSA tickets meeting specific criteria, providing a direct link to the Rewst Offboarding Form.

**Integrations:** Halo PSA, ConnectWise PSA, Datto PSA

**Why MSPs love it:** Streamlines offboarding, consistently guiding technicians to the correct procedure.



## 14. OpenAI Ticket Categorization

**What it Does:** Utilizes the OpenAI API to categorize tickets based on types and sub-types.

**Integrations:** OpenAI, Halo PSA, ConnectWise PSA, Datto PSA

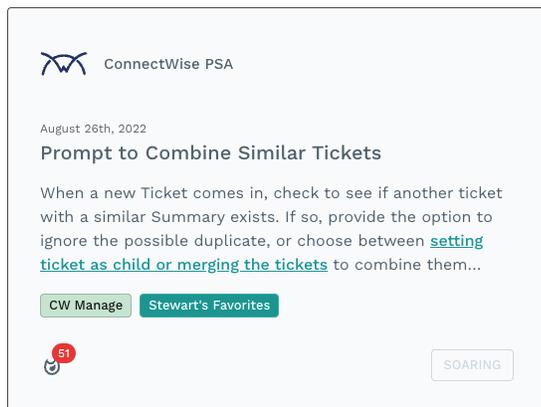
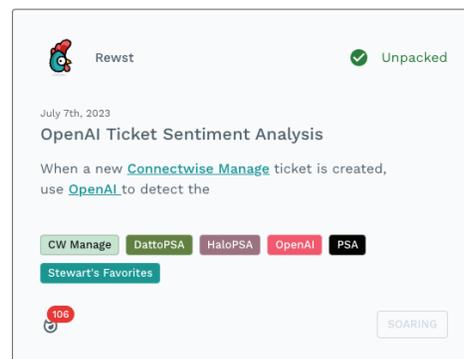
**Why MSPs love it:** Enhances reporting accuracy and streamlines ticket triage.

## 15. OpenAI Ticket Sentiment Analysis

**What it Does:** Analyzes customer note sentiment on a ticket, updating priority, impact, and severity.

**Integrations:** OpenAI, Halo PSA, ConnectWise PSA, Datto PSA

**Why MSPs love it:** Facilitates quicker responses to customer issues by escalating negative sentiment tickets.

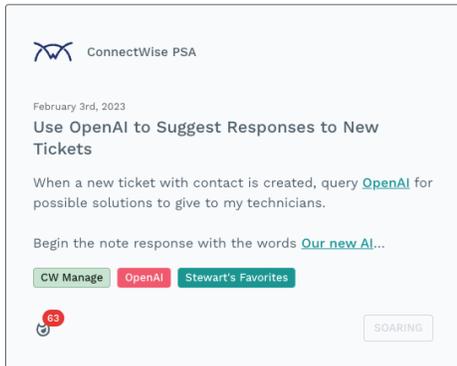


## 16. Prompt to Combine Similar Tickets

**What it Does:** Checks for duplicate tickets, offering options for resolution.

**Integrations:** ConnectWise PSA

**Why MSPs love it:** Prevents redundancy and ensures efficient ticket management.



## 17. Use OpenAI to Suggest Responses to New Tickets

**What it Does:** Queries OpenAI for potential solutions for new tickets.

**Integrations:** OpenAI, ConnectWise PSA

**Why MSPs love it:** Leverages AI for faster and informed ticket resolution.

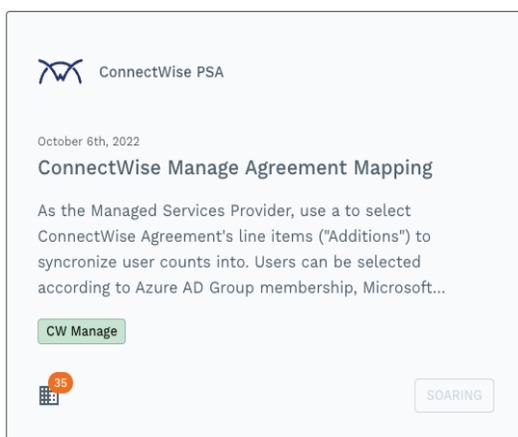
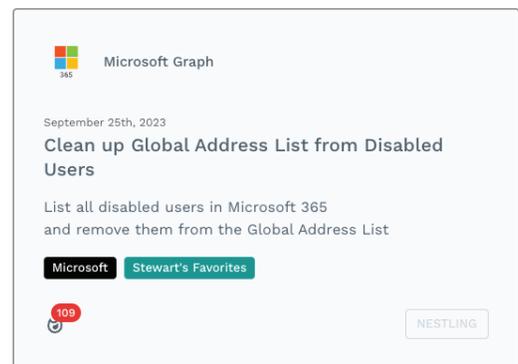
## Reporting Crates

### 18. Clean up Global Address List from Disabled Users

**What it Does:** Identifies and removes disabled users from the Global Address List in Microsoft 365.

**Integrations:** Microsoft Graph

**Why MSPs love it:** Ensures accurate reports by maintaining a tidy contact list.

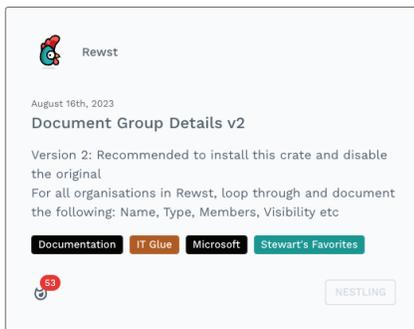


### 19. ConnectWise PSA (Manage) Agreement Mapping

**What it Does:** Syncs user counts into ConnectWise Agreement line items based on criteria like Azure AD Group membership, Microsoft Licensing, or Department fields. Also lets you include a list of users in the Addition's Description field.

**Integrations:** ConnectWise PSA

**Why MSPs love it:** Streamlines user count synchronization, providing accurate and detailed reporting.



## 20. Document Group Details V2

**What it Does:** Documents the name, type, members, and visibility of all organizations in Rewst.

**Integrations:** Microsoft Graph, IT Glue

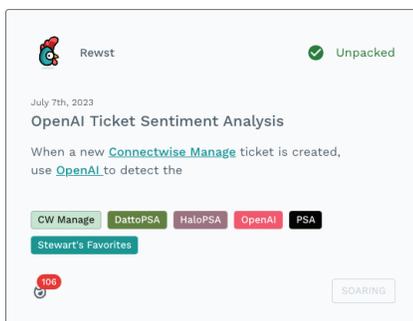
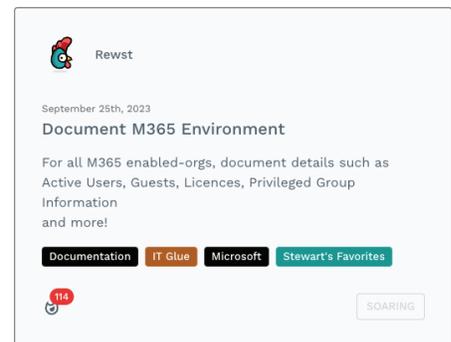
**Why MSPs love it:** Maintains up-to-date organization details for accurate reporting.

## 21. Document M365 Environment

**What it Does:** Tracks essential metrics in Microsoft 365 organizations for comprehensive documentation.

**Integrations:** Microsoft Graph, IT Glue

**Why MSPs love it:** Simplifies documentation, optimizes license usage, and enhances security through proactive monitoring.



## 22. Document Rewst Forms URLs

**What it Does:** Organizes workflow triggers, updating a flexible asset with relevant form triggers.

**Integrations:** IT Glue

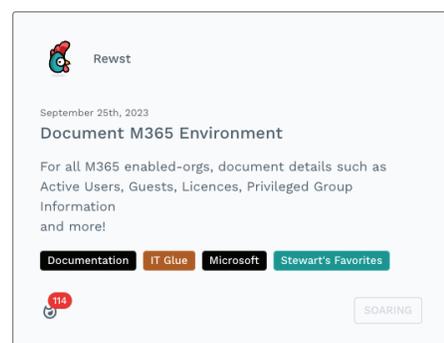
**Why MSPs love it:** Easier workflow trigger management and reporting, promoting simplicity and organization.

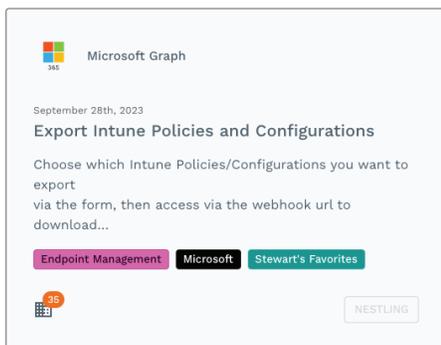
## 23. Document User Details

**What it Does:** Documents essential details for all organizations in Rewst.

**Integrations:** Microsoft Exchange Online, Microsoft Graph, IT Glue

**Why MSPs love it:** Automates documentation, providing up-to-date information for accurate reporting.





## 24. Export Intune Policies and Configurations

**What it Does:** Allows the selection of Intune policies and configurations for export via a webhook URL.

**Integrations:** Microsoft Graph

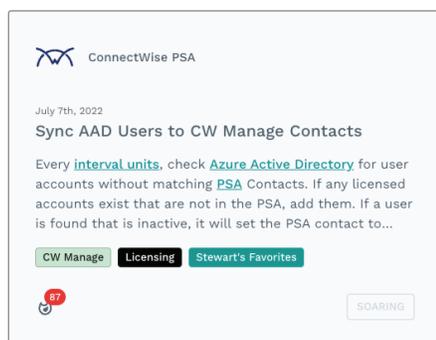
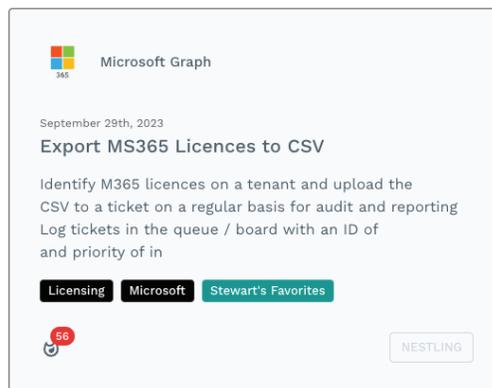
**Why MSPs love it:** Optimizes backup, sharing, and integration of critical Intune data, enhancing reporting flexibility.

## 25. Export MS365 Licenses to CSV

**What it Does:** Automates Microsoft 365 license auditing, generating CSV reports for compliance checks.

**Integrations:** Microsoft Graph, Halo PSA, ConnectWise PSA, Datto PSA, Freshdesk, Kaseya BMS

**Why MSPs love it:** Clarifies license auditing, ensuring ongoing compliance and resource allocation assessment.

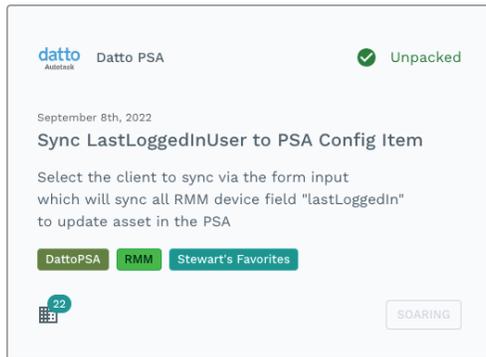


## 26. Sync AAD User to CW manage Contacts

**What it Does:** Checks Azure Active Directory daily for user accounts without matching ConnectWise PSA Contacts.

**Integrations:** ConnectWise PSA, Microsoft Graph

**Why MSPs love it:** Facilities alignment, ensuring accurate and up-to-date reporting on licensed accounts.



## 27. Sync Last Logged In User to PSA Config Item

**What it Does:** Simplifies tracking the last login activities on devices and updating assets in the PSA.

**Integrations:** Datto PSA

**Why MSPs love it:** It provides an effortless way to keep PSA assets up to date, minimizing manual data entry.

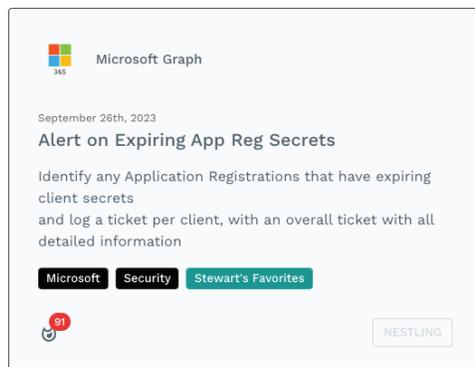
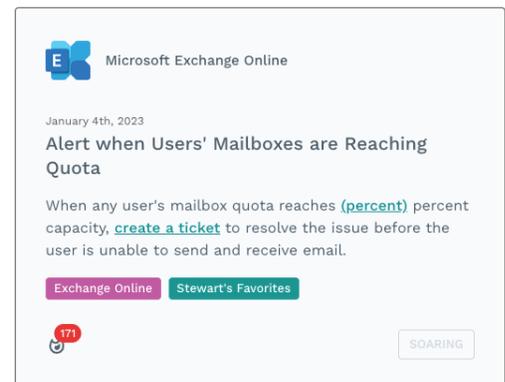
## Alerting Crates

### 28. Alert When Users' Mailboxes Are Reaching Quota

**What it Does:** Generates a PSA ticket when any user's mailbox reaches a defined percentage capacity.

**Integrations:** Microsoft Exchange Online

**Why MSPs love it:** Reduces risk of disruptions and automates monitoring, ensuring timely notifications to prevent mailbox overflows.



### 29. Alert on Expiring App Reg Secrets

**What it Does:** Proactively monitors and logs expiring client secrets in Application Registrations.

**Integrations:** Microsoft Graph

**Why MSPs love it:** Prevents service interruptions by identifying expiring client secrets ensuring proactive remediation.

## 30. Alert on Expiring App Reg Certificates

**What it Does:** Identifies any App Registrations with expiring certificates and logs tickets for remedial action.

**Integrations:** Microsoft Graph

**Why MSPs love it:** Prevents service interruptions by ensuring proactive remediation of expiring certificates.



## Increase your time to value with Rewst

While this guide details **30 of our favorite Crates**, we have 100 more pre-built automations in our marketplace, each designed to empower you in various aspects of your operations. Tailor our Crates to your unique requirements and increase your time to value with Rewst today.

