Contact center tools

Version 8.0

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Regular queue workflow

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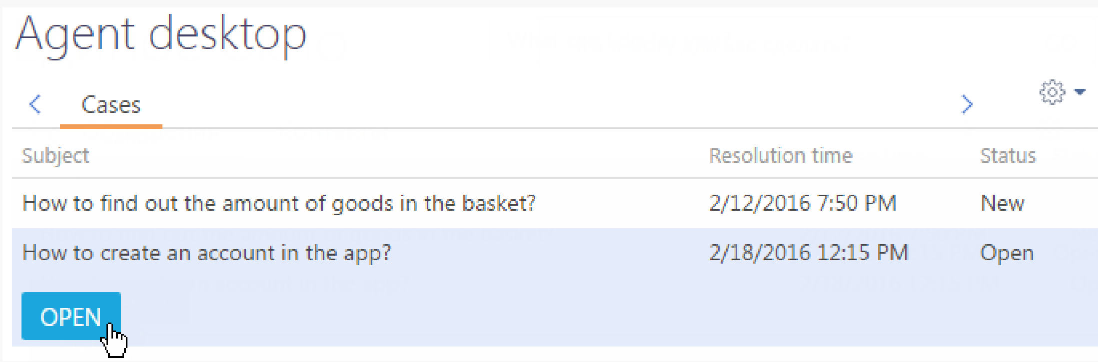
Let's take a look at the typical procedure to process cases via the agent desktop using a regular queue. When an agent takes a case from a queue to process it, the “Agent desktop: Queue cases processing” business process starts.

Note. You can set up custom business processes to handle the cases in your company.

To start working on a case from a regular queue:

1. Select the necessary record from the list and click the [*Open*] button (Fig. 1). When the agent takes a case, it is no longer visible on the agent desktop for other agents.

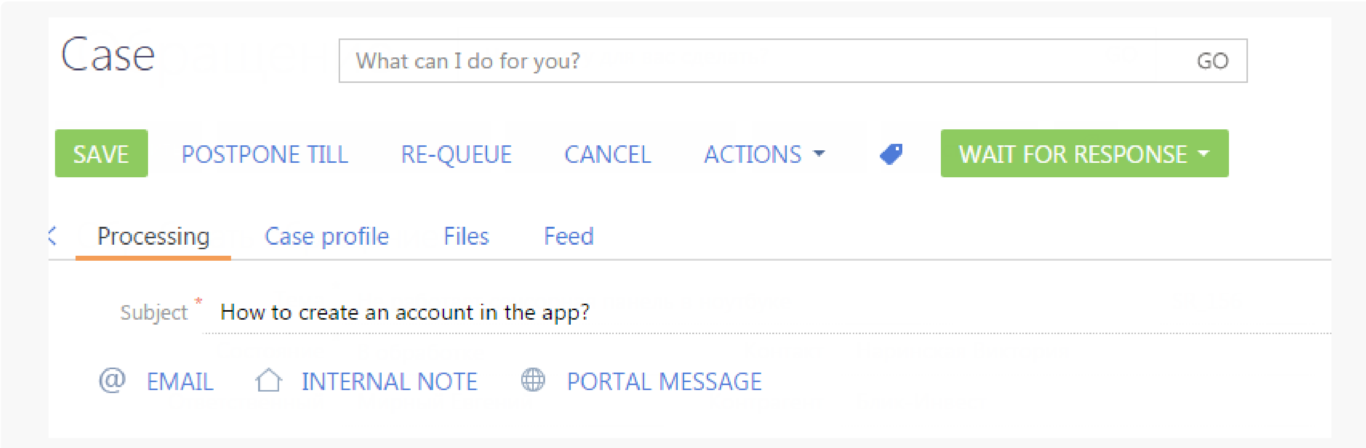
Fig. 1 Taking a case from a regular queue



The page of the selected case (Fig. 2) will open with the following information:

- The value in the [*Status*] field changed to “In progress”
- The agent who took the case is specified as the assignee
- The [*Actual response time*] field is filled in with the current date.

Fig. 2 Page of a case in progress



2. Perform one of the following actions:

- To process the case, change its status. For example, specify the “Resolved” status.
  After you save the page, the [*Agent desktop*] section will be displayed again. The processed case will be removed from the queue.
- To postpone processing the case to another specific time, click the [*Postpone till*] button and enter the date and the time.
  Click the [*Submit*] button to return to the agent desktop. The case will not be displayed on the agent desktop until the specified processing time comes. After that, it will be displayed at the top of the list in the queue of the agent who initially took this case.
- To put off processing the case, click the [*Re-queue*] button.
  The [*Agent desktop*] section will be displayed again. The postponed case will be placed at the end of the queue regardless of the set record sorting rules in the queue.
- To cancel processing the case, click the [*Cancel*] button.
  You will return to the agent desktop and the case will be queued back to the same position it had before you started processing it.

General Agent Desktop settings

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The Agent desktop section is designed to facilitate the work of contact centers and helpdesk agents. Use the agent desktop to manage cases in a single window with the help of out-of-the-box best practice processes, get instant access to customer's profile, and improve customer experience.

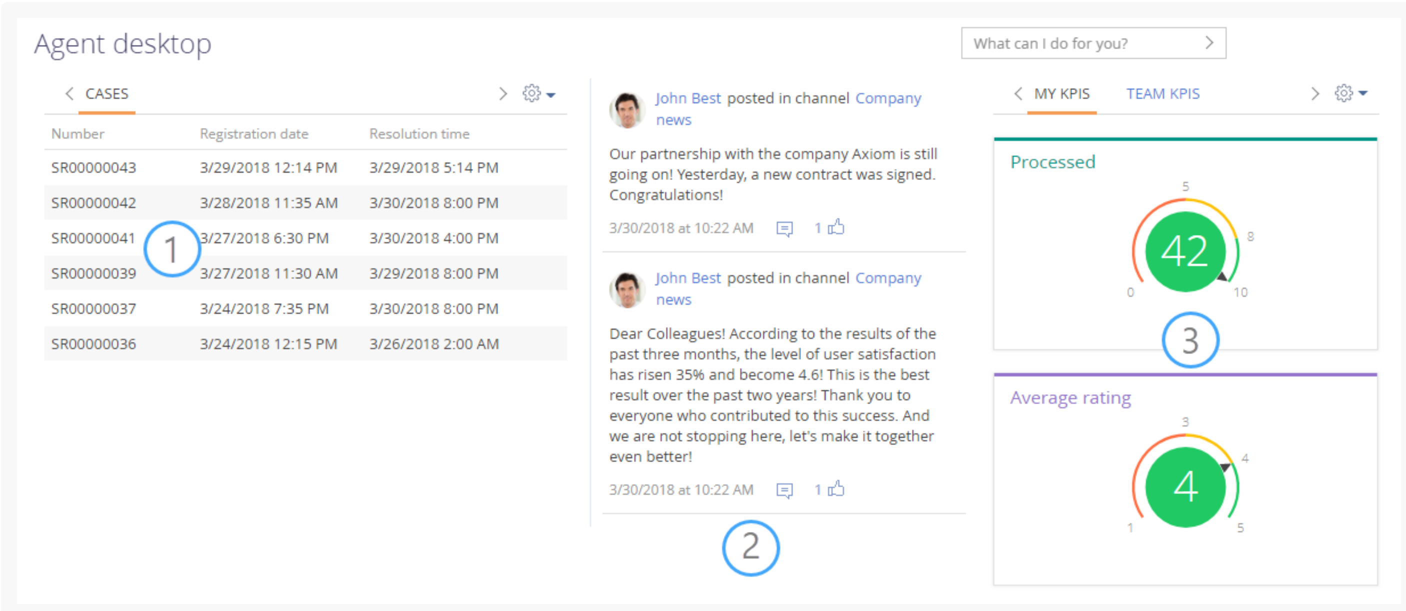
Using the agent desktop an agent can quickly process tickets in the omnichannel mode, manage incoming and outgoing calls, and work with other queue items. In the agent desktop, the employee can read the messages posted on the feed and analytical KPI dashboards of a single employee or the whole team are available.

Note. To allow the employees to receive incoming calls from the agent desktop, set up a connection between Creatio and your phone provider.

The [*Agent desktop*] (Fig. 1) section consists of the following areas:

- The working area of the agent (1) displays the list of records for processing.
- The feed area (2) displays posts from your enterprise social network.
- The analytics area (3) displays aggregate data on agent performance.

Fig. 1 The [*Agent desktop*] section



The working area of the agent

The working area of the contact center agent or helpdesk agent on the agent desktop is a number of tabs with the records that are displayed in the agent desktop according to the conditions of pre-configured queues.

The agent desktop tabs are created automatically, based on the queue teams of which the current agent is a member. Each agent desktop tab corresponds to a system object regardless of the number of the configured queues. For example, all records coming from the “Case” type will be displayed in the [*Cases*] tab of the agent desktop.

By default, the [*Cases*] tab displays incidents, service requests, claims, and complaints, that come from the [*Cases to be processed*] queue. These are unresolved requests.

Note. You can set up custom agent desktop queues in the [*Queues*] section.

Note. Use the [*Agent desktop queues upload interval*] system setting to change the update cycle for agent desktop records.

Agent desktop feed channel

Use the feed channel for prompt notification of the helpdesk agents or agents about noteworthy events of the company. The agent desktop feed displays posts and comments from a specific feed channel. Use the [*Agent desktop - Channel*] system setting to select this channel.

Agent desktop dashboards

The agent desktop dashboard displays. The agent desktop analytics consists of two tabs. One tab displays the agent's personal achievements and the other tab displays the team's achievements. These dashboards display summary data for the current day.

Manage records in the Agent Desktop

The list of records displayed on the agent desktop tabs depends on the queue type, which can be "regular" or "blind."

Display records in regular queues

Regular queues display lists of records and the agent can select which record to process. The order of the records depends on the sorting rules of the agent desktop records.

Display records in blind queues

Blind queues display:

- The [*Next record*] button initiates the processing of the next record in the queue. The processing order depends on the sorting rules of the agent desktop records.
- The list of records for which the processing started, but has not been completed yet.

Use the [*Maximum number of records in progress for a blind queue*] system setting to limit the maximum number of records that can be displayed in the list of a blind queue. By using this system setting, you can limit the number of cases in progress shown to the agent in order to increase the case resolution efficiency.

By default, the [*Maximum number of records in progress for a blind queue*] system setting is set to “1”. Thus, the agent desktop working area shows either the [*Next record*] button or a single record if the processing of this record has not been completed.

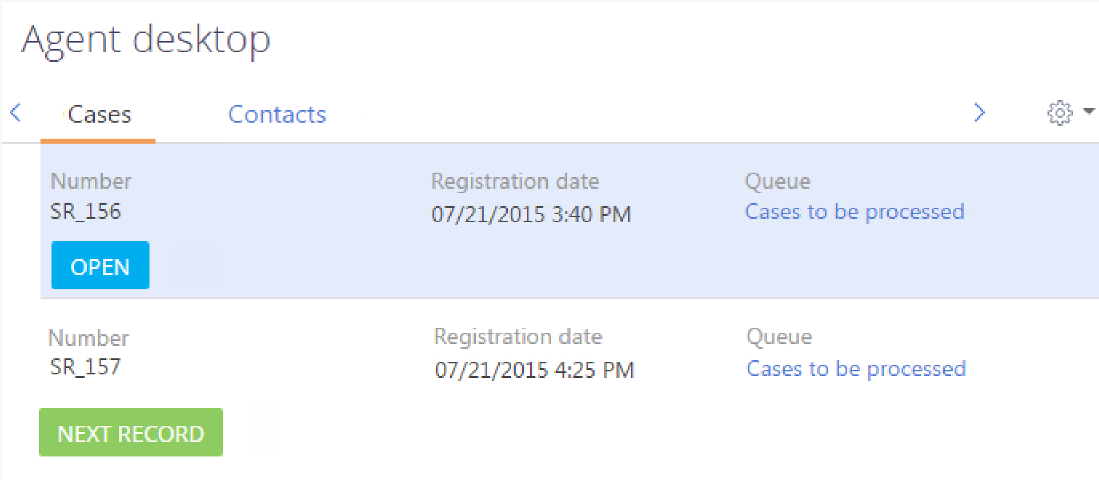
If you increase the value of this system setting, the agent will be able to continue working with the record in progress or take the next record in the queue for processing as long as the number of displayed records is not at maximum. When the number of displayed records reaches the maximum, the [*Next record*] button becomes unavailable.

For example, the value of the [*Maximum number of records in progress for a blind queue*] system setting has been set to “3”.

The agent who has started processing one or two cases on the agent desktop will see both the list of his cases in progress and the [*Next record*] button (Fig. 1). The agent can choose to continue processing the cases in the list or take a new record.

If the agent takes a third case, it will be added to the list in the agent desktop working area and the [*Next record*] button will be unavailable, so in order to be able to take another new case for processing, the agent must resolve at least one of the currently open cases.

Fig. 1 Blind queue example



Sort records on the agent desktop

The records on the agent desktop tabs are sorted based on certain rules. These sorting rules are identical for both regular and blind queues.

- The records whose due date has been reached are displayed at the top of the list.
- These records are followed by more records from the existing queues.

  If multiple queues have been created for an object, then the records from a higher priority queue will be closer to the top of the list.

  If multiple queues with the same priority have been created for an object, their records will be sorted based on the internal sorting settings of the corresponding queues. Therefore, the records from multiple queues may take turns on the agent desktop. If the records which are coming from different queues should not be mixed in the list, create additional priorities in the [*Agent desktop queue priority*] and assign a separate priority for each queue specified for the object.
- The records in the queues are sorted based on the object columns first, and then – by the number of calls connected to each record (the less repeated calls there are, the higher the record's position in the list will be).

Note. More information on how to sort queue records by object columns is available in a separate article.

Blind queue workflow

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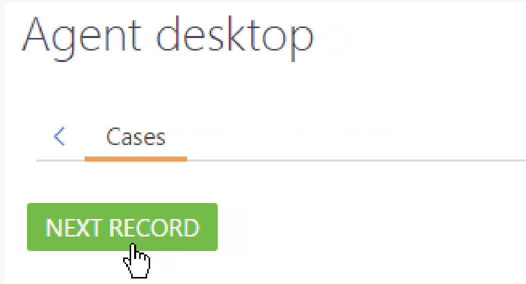
Let's take a look at the typical procedure to process cases via the agent desktop using a blind queue. When an employee takes a case from the queue, the “Processing order in Agent desktop queue” business process is run.

Note. You can set up another business process to handle your cases.

To start working on a case from a regular queue:

1. On the corresponding tab of the agent desktop, click the [*Next record*] button (Fig. 1).
   When an agent takes a case, other agents will not be able to process the case on the agent desktop.

   Fig. 1 Taking a case from a regular queue

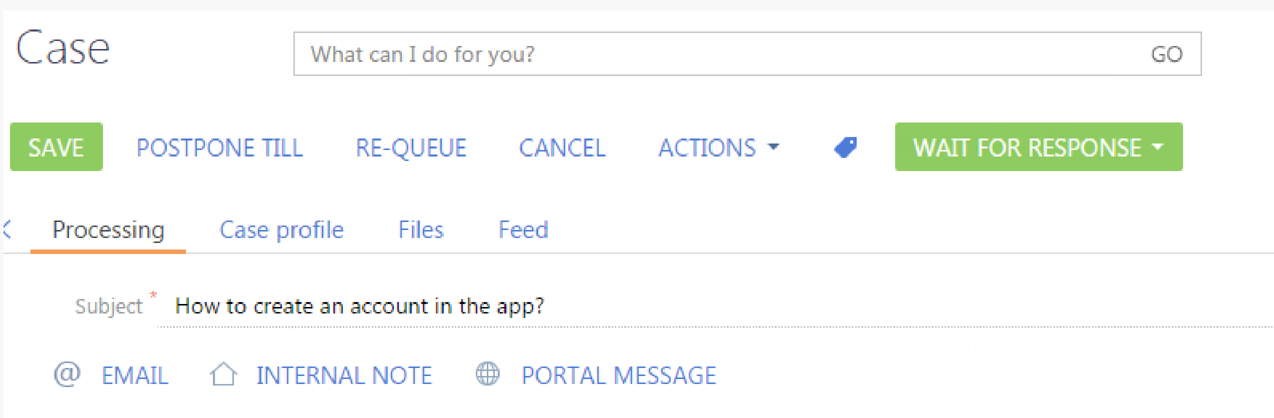
   As a result, the page of the case to process next will open. The algorithm used to select a case takes into account the queue priorities and inner sorting rules of a given queue. (Fig. 2).

   Note. Learn more about elements sorting order on the agent desktop from a separate article.

   On the opened case page:

   - The value in the [*Status*] field is changed to “In progress”
   - The agent who took the case is specified as the assignee
   - The [*Actual response time*] field is filled in with the current date.

   Fig. 2 — Page of the case in progress

2. Perform one of the following actions:

   - To process the case, change its status. For example, specify the “Resolved” status.
     After you save the page, the [*Agent desktop*] section will be displayed again. The processed case will be removed from the queue.
   - To postpone processing the case to another specific time, click the [*Postpone till*] button and enter the date and the time.
     Click the [*Submit*] button to return to the agent desktop. The case will not be displayed on the agent

desktop until the specified processing time comes. At the scheduled time, the case will be displayed on the agent desktop tab only for the agent who has started handling the case. Along with this, the [*Next record*] button will be available or unavailable based on the maximum number of cases that can be assigned with the "In progress" status simultaneously for the blind queue. This value is specified in the [*Maximum number of records in progress for a closed queue*] system setting.

- To put off processing the case, click the [*Re-queue*] button.
  The [*Agent desktop*] section will be displayed again. The case will be placed at the end of the queue regardless of the record sorting rules of this queue. Time for processing such case will come after having processed the cases which are on the higher positions in the queue.
- To cancel processing the case, click the [*Cancel*] button.
  The [*Agent desktop*] section will be displayed again showing the case which has been canceled. Along with this, the [*Next record*] button will be available or unavailable based on the maximum number of cases that can be assigned with the "In progress" status simultaneously for the blind queue. This value is specified in the [*Maximum number of records in progress for a closed queue*] system setting.

> **Note.** The way the records from a blind queue are displayed on the agent desktop is described in a separate article.

Manage queue objects

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The [*Queues*] section enables you to manage calls and case processing sequence. Increase the efficiency of your contact center by creating queues tailored to your company-specific features, customer history, and case priority.

The [*Queues*] section provides contact center or support team supervisors with the instruments to efficiently manage incoming and outgoing communications. Customization enables you to plan for a constant flow of cases, define priorities, and assign employees. Although typical queue elements are cases you can set up queues for other system objects, such as accounts and contacts.

After the queues have been set up, the agent desktop will display the list of records for processing. The content of the list depends on the following:

- the object the queue is created for;
- queue population type (static or dynamic);
- queue display type (regular or blind).

Default queue objects include "Contact", "Account", "Case". You can set up queues for other objects. A list of the queue objects can be found in the [*Queue objects*] lookup. The content of all queues for each object will be displayed on a separate tab on the agent desktop. For example, cases are displayed on the [*Cases*] tab of the agent desktop.

Queues can be populated manually or automatically. Static queues are populated manually and are commonly used for campaigns with a set timeframe and target audiences, such as limited-time promotional offers. DYNAMIC queues are filled in automatically as the records are created or modified in the system. Such queues are a good option, e.g., for prioritizing the CC incoming cases. The type of queue population is determined when a queue is created.

You can also control whether the agents can choose which record to take next. When working with open queues, agents can choose which record to take next. The order of the records depends on the record sorting rules on the agent desktop. Agents who work with blind queues can take only the next record in queue. In a blind queue, an agent can take the next record only after processing the previous one.

Queues with one display type (open or closed) can be created for one object.

Incoming call workflow

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Creatio provides two out-of-the-box business processes to handle cases received by a call. The processes start when an agent receives a call from a customer.

> **Attention.** Telephony setup is needed to work by the processes. Furthermore, the processes are available only for the users included in the folder specified in the [*Folder – Contact Center agents*] system setting.

When taking a call, an agent can choose to run one of the Creatio business processes, depending on the call purpose: create a new case or start consultation for an existing case.

The process flow depends on whether the subscriber is identified or not. The system allows identifying the contact or creating a new one. According to the customer's request, a new case will be created or the contact page will open. On this page, the agent will be able to see the history of communication with the customer and provide consultations regarding the existing cases.

When a call is received, the [*Calls*] tab becomes active on the communication panel. On the [*Processes*] detail of the [*Call*] tab, the following actions become available: [*Add new case*] and [*Advice on existing case*]. Each action starts the corresponding business process.

Case registration process

To register a new case when taking a call, select the [*Add new case*] action. This action will trigger the corresponding process. The process can have different flows based on different conditions. These flows and conditions can be summarized in the following table.

Condition	Agent actions
The contact is uniquely identified by a phone number registered in the system.	Clicking the [*Add new case*] button opens a new case page where you should enter the information provided by the customer. On the case page, the [*Contact*] field is automatically populated.
The system detected multiple contacts with the same phone number from which the call has been received	The call panel displays the [*Search results*] detail that contains the list of contacts with the phone number from which the call has been received. Click the record of the right contact and then click the [*Add new case*] button, so a new case page will open. The [*Contact*] field on the page will be automatically populated.
The contact is not identified by the phone number, but the call has been received from a customer already registered in the system	Clicking the [*Add new case*] button opens the contact identification page. On this page, you can search for the contact by name, by communication options, or by the name of the company where the employee works. Select proper contact and then click the [*Add new case*] button, so a new case page will open. The [*Contact*] field on the page will be automatically populated. The phone number from which the call has been received will be added to the [*Communication options*] detail of the selected contact.
The contact is not identified by the phone number and the call has been received from a new customer	Clicking the [*Add new case*] button opens a contact identification page where you should select the [*Add case and contact*] action. On the opened page, enter contact data. Click the [*Next*] button, so a new case page will open. The [*Contact*] field on this page will be automatically filled in. If needed, you can edit the record of the new contact after saving the record of the new case.

Advising on an existing case process

To advice a customer on an existing case, select the [*Advice on existing case*] action. This action will trigger the corresponding process. The process can have different flows based on different conditions. These flows and conditions can be summarized in the following table.

Condition	Agent actions
The contact is uniquely identified by a phone number registered in the system.	Clicking the [*Advice on existing case*] button opens the page of the caller contact. Open the [*History*] tab to view the list of cases connected to the given contact.
The system detected multiple contacts with the same phone number from which the call has been received	The call panel displays the [*Search results*] detail that contains the list of contacts with the phone number from which the call has been received. Click the record of the needed contact and then click the [*Advice on existing case*] button. The page of the selected contact will open. Open the [*History*] tab to view the list of cases connected to the given contact.
The contact is not identified by the phone number, but the call has been received from a customer already registered in the system	Clicking the [*Advice on existing case*] button opens the contact identification page. On this page, you can search for the contact by name, by communication options, by the number of the registered case, or by the name of the company where the employee works. Select proper contact and then click the [*Add new case*] button, The page of the selected contact will open. Open the [*History*] tab to view the list of cases connected to the given contact.
The contact is not identified by the phone number and the call has been received from a new customer for whom registered cases have not been found	You will need to proceed to the process of creating a new case. Clicking the [*Advice on existing case*] button opens a contact identification page where you should select the [*Add case and contact*] action. On the opened page, enter contact data. Click the [*Next*] button, so a new case page will open. The [*Contact*] field on this page will be automatically filled in. If needed, you can edit the record of the new contact after saving the record of the new case.

Create dynamic queue

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Dynamic queues are populated automatically. The queue will be populated with records that match a specific filter condition. For example, dynamic queues can be used to process new cases that have not yet been assigned a responsible.

Let's take a closer look at how to create and populate dynamic case queues. To create a dynamic queue for cases where the resolution deadline is today or falls within the nearest three days: To do this:

1. Go to the [*Queues*] section.
2. Open the [*Queues setup*] view and add a new element.
3. Specify the name of the queue in the opened window.

4. Select the priority for the queue. The queue priority influences the display order of the queue elements on the agent desktop.

> **Note.** Learn more about elements sorting order on the agent desktop from a separate article.

5. Select a system object in the [*Queue type*] field. In our case, it is “Case”. You can customize queue objects in the [*Queue objects*] lookup by clicking the [*Queue sorting setup*] action in the [*Queues*] section. After saving the queue you cannot change its type.

> **Note.** The selected object defines the queue type - regular or blind.

6. Select the "In progress" queue status.

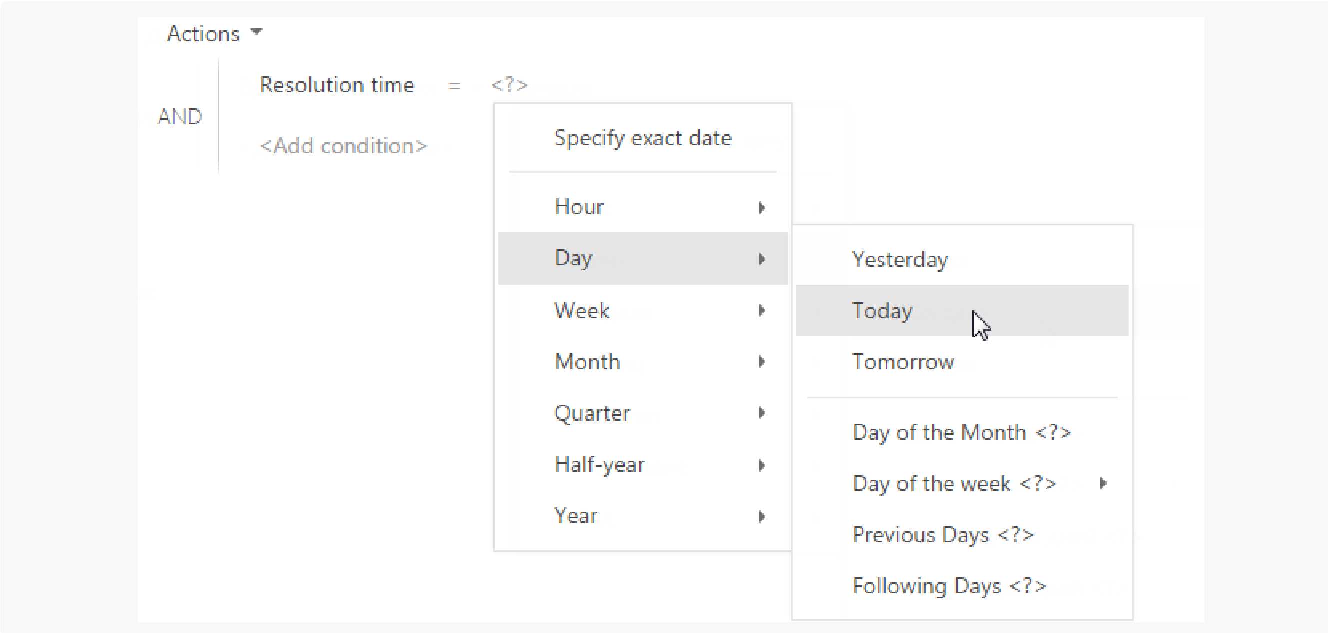
> **Note.** The agent desktop displays only active queues. The status of active queues is “In progress”. By default, the status is "Active".

7. Select a business process in the [*Process*] field. The selected business process will be run each time an agent takes an element from the queue. Select the “Agent desktop: Queue cases processing” business process for cases.

> **Note.** To be able to use a process in a queue, add two global parameters to it: “queueelementId” and “entityRecordId” with the "Unique identifier” type. The record ID from the ([*Queue element*] object) is passed to the “queueelementId” parameter, and the contact/case/application record ID is passed to the “entityRecordId” parameter.

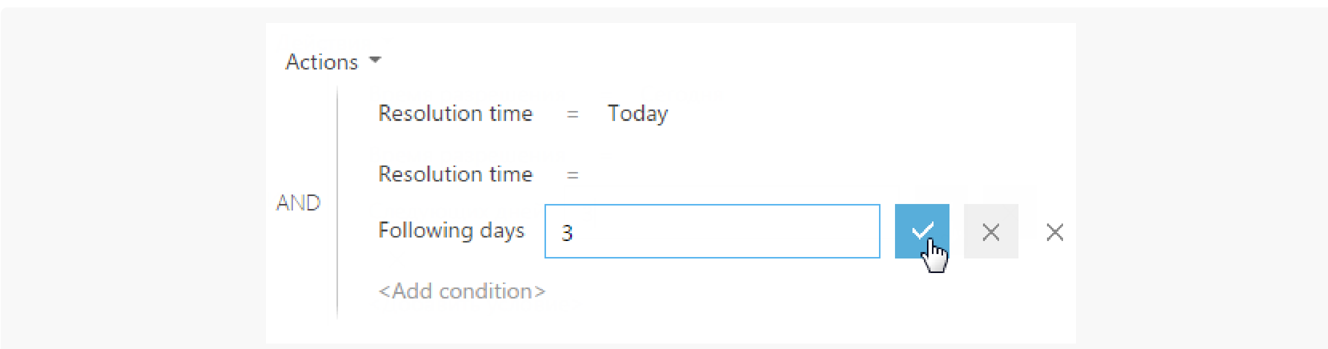
8. Select the [*Automatically by filter conditions*] option in the [*Queue population type*] field group on the [*Queue population*] tab.
9. Specify the filter conditions in the filter area.
    a. Click the [*Add condition*] link and select the [*Resolution time*] column in the opened window. Select the value of the condition: "Day → Today”(Fig. 1).

Fig. 1 Setting up the "Resolution time = Today” filter condition



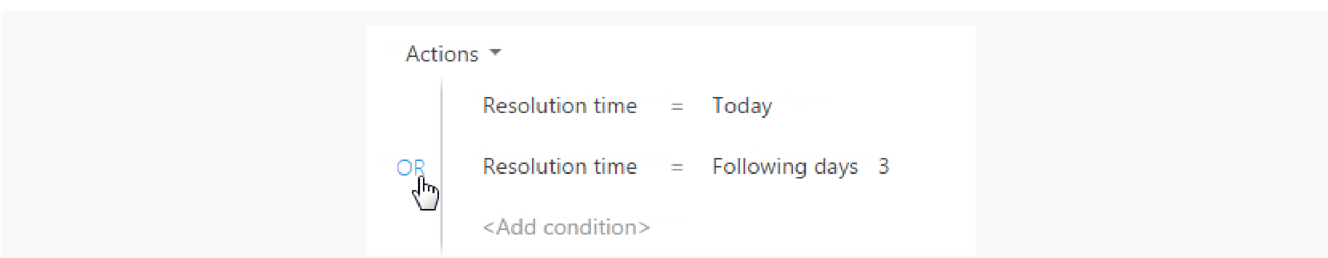
b. Add another filter condition: "Resolution time = Following 3 days" (Fig. 2).

Fig. 2 Setting up the "Resolution time =Following 3 days” filter condition



c. Select the "OR" logical operator (Fig. 3).

Fig. 3 Selecting the "OR" logical operator



Attention. If you do not specify the filter condition for a dynamic queue, the queue elements will not be displayed on the agent desktop.

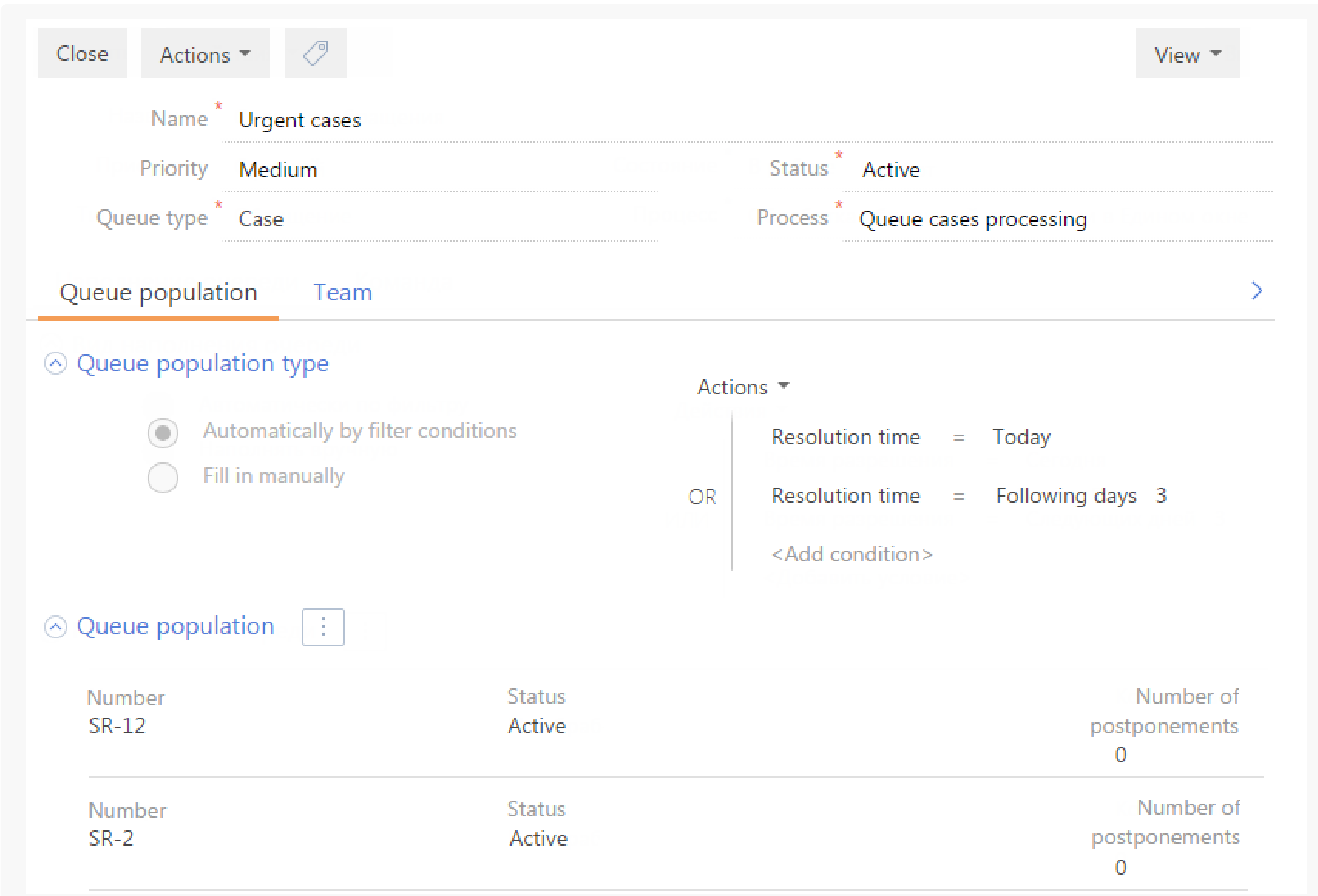
10. To form a list of agents to process objects from the queue, go to the [*Team*] tab. Click the [*New*] button and select the required employees. The selected contacts can process the content of the queue from the agent desktop.

Attention. Only those agents who have the [*Active*] checkbox selected on the [*Team*] tab can process the queues. By default, this checkbox is selected for all contacts on the detail. You can clear the checkbox for certain agents. In this case, the queue elements of the queue will not be displayed on the agent desktop for these agents.

11. Save and close the page.

To view the content of the queue, select the [*Fill queues*] action from the action menu of the [*Queues*] section. Open the queue record. All applications in the current queue will be displayed on the [*Queue population*] detail (Fig. 4). The data is available in read-only mode.

Fig. 4 Dynamic queue page



Supervisor workflows

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The contact center or support team supervisor can use the [*Queues*] section to control the queue elements handling.

Here you can view all cases and other queue elements:

- You can monitor the work of the contact center on-line. When monitoring the content of all queues in one list, a contact center supervisor can view the number of cases or outgoing calls or elements that are already in progress.

- Track the performance of specific queues and control the workload of particular agents using the quick filters.
- Due to the similar queue element sorting, as well as on the agent desktop agent page, the supervisor can identify which queue elements are going to be processed.
- Distribute the current workload between the agents by assigning the agents to specific queue elements. Involve additional agents to work with the queues. Delegate cases from one agent to the other or cancel handling the case by a particular agent.
- Join the contact center team: take cases and other queue elements, return the elements that were closed incorrectly back to the corresponding queues, manually close the queue elements that do not require processing.

Note. Any user who has access to the [*Queues*] section can perform all operations as the contact center manager.

Monitor contact center performance

The key element of agent workflow management is the ability to monitor the total workload of the contact center. When monitoring all outgoing calls and incoming cases in a single list, the supervisor can quickly identify the cases that require attention.

Use the [*Queues*] section to view all incoming cases, contacts, and accounts in a single list if they were added to the static queues or are within the dynamic queues according to the filter settings.

The list displays key information about the queue content. You can manage the information displayed using the standard [*View*] menu > [*Select fields to display*] menu.

Queue	The queue to which the element belongs. Click the queue name to open the setup page of the current queue.
Agent	The agent who processed the queue element or was assigned by the contact center manager to handle the queue element.
Status	Current status of the element in a queue: "Not processed" – the agent has not started working with the element. Assigning the agent does not change the status of the element in the queue. "In progress" – the agent has started working on the element by clicking the [*Take it*] button. "Processed" – the agent has finished working with this element. The elements in this status are not displayed unless the [*Show processed*] checkbox is checked.
Date of next handling	The field displays the date when this element is scheduled for processing if the agent postponed the processing of this element.
Number of postponements	The number of times the element was returned to the queue by clicking the [*Back to queue*] button.
Case, Account, Contact, etc.	The main fields of the queue object. The “primary display columns” of the queue object. The primary display column contains the case number for the "Cases" queue object or the contact full name for the "Contact" queue object. If you add other objects to the [*Queue objects*] lookup, their primary display columns will be displayed in this field too. Click the queue element name to open the corresponding record page.

Note. Customize columns to display fields of queue objects in the list. For example, you can add the [*Case subject*] field to the list of the [*Queues*] section.

The [*Queues*] section displays information about queue elements that are being processed, elements that were taken by an agent and postponed, and those that were not taken. When sorting elements by the [*Agent*] or [*Status*] column, the contact center manager can view the current status of the operations.

Manage progress on specific queues

To monitor the progress of particular queues, the contact center manager can quickly display data for particular queues. For example, the queues filter can be used to analyze calls to customers for one or several product promotions.

To view particular queue items, filter the records using the [*Queue*] filter:

1. Go to the [*Queues*] section.
2. In the [*Queues*] view, click [*Queue*] and select the [*Add queue*] option.

3. Select the required queue in the opened lookup.

   The selected queue will be added to the filter conditions. The content of this queue will be displayed in the list. If you add multiple queues to the filter, all elements from the selected queues will be displayed.

You can view the progress for specific queues by displaying the total number of their elements. To view the queue elements:

1. In the [*View*] menu, select the [*Set up summaries*] command.
2. Select the [*Display number of records*] checkbox.

To display processed elements, select the [*Show processed*] checkbox. Only processed elements from the selected queues will be displayed in the list, for example, closed cases or completed calls.

To view which queue elements are in the process, sort the elements by [*Agent*] or [*Status*] column.

Manage current workload of an agent

To view the current workload of an agent, filter the elements by the agent in the [*Queues*] section. The filter enables you to view the current workload for one or several agents regardless of which queues they work with.

To filter the case by an agent:

1. Go to the [*Queues*] section.
2. Select the [*Add agent*] option from the [*Agent*] filter.
3. Select the required agent in the opened lookup.

   The list will display queue elements that are being processed by the selected agent and those elements assigned to that particular agent. If you add several agents to the filter, the list will display queue elements processed by all of the selected agents.

4. To view processed cases, check the [*Show processed*] checkbox.

   As a result, processed queue elements, such as closed cases, will be displayed in the list. for example, the cases with the "Closed" status.

The contact center manager can then monitor which cases the agent is currently processing and which the agent has already processed.

Plan agent workload

To plan which queue elements will be processed next by the agents, display the items from the selected queues in the same order as they are shown on the agent desktop To do this:

1. Go to the [*Queues*] section.
2. Use the queue filter to display the required elements in the list.
3. Select the [*Agent view*] checkbox.

The queue elements will be displayed in the same order as they are shown on the agent desktop As a result, the contact center manager can view the order in which the elements will be processed.

If the [*Agent view*] checkbox is selected, the list in the [*Queues*] section will display all elements from the blind queues and in the order in which they will be processed.

Assign agents

The contact center manager can assign and reassign agents manually or cancel low priority elements.

To assign agents:

1. Go to the [*Queues*] section.
2. Select the queue element that must be assigned to a particular agent in the list.
3. Select the [*Assign agent*] option from the [*Actions*] menu.
4. Select an agent from the list.

   The selected agent will be assigned to the queue element. The elements assigned to the agent will be displayed on the agent desktop for this particular agent even if the agent is not included in the team of the corresponding queue. After assigning the agent, the item will not be displayed on the agent desktop for other agents.

To cancel the assignment:

1. Go to the [*Queues*] section.
2. Select the element that has been assigned to an agent.
3. Select the [*Clear agent*] option from the [*Actions*] menu.

   The selected element will be returned to the queue and becomes available for an agent who is included in the corresponding queue team.

Create static queue

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The content of static queues is formed manually and is not updated automatically. The static queues can be used for cold calls to a predefined group of contacts to inform them about events.

Let's look closer at an example of creating and populating the static queues for the cold calls to the new customers. To do this:

1. Go to the [*Queues*] section.
2. Open the [*Queues setup*] view and add a new element.
3. Specify the name of the queue on the new page, for example, “New customers”.
4. Select the priority for the queue. The queue priority influences the display order of the queue elements on the agent desktop.

   > **Note.** Learn more about elements sorting order on the agent desktop from a separate article.

5. Select a system object in the [*Queue type*] field. In our case, it is “Contact”. You can customize queue objects in the [*Queue objects*] lookup by clicking the [*Queue sorting setup*] action in the [*Queues*] section. After saving the queue you cannot change its type.

   > **Note.** The selected object defines the queue type - regular or blind.

6. Select the "In progress" queue status.

> **Note.** The agent desktop displays only active queues. The status of active queues is “In progress”. By default, the status is "Active".

7. Specify a pre-configured business process in the [*Process*] field. The selected business process will be run each time an agent takes an element from the queue.

> **Note.** For queues by the “Contact” object, it is necessary to create a business process in Creatio on the agent desktop. To be able to use a process in a queue, add two global parameters to it: “queueelementId” and “entityRecordId” with the "Unique identifier” type. The record ID from the ([*Queue element*] object) is passed to the “queueelementId” parameter, and the contact/case/application record ID is passed to the “entityRecordId” parameter.

8. Select the [*Fill in manually*] option on the [*Queue population*] tab in the [*Queue population type*] fields group.
9. Go to the [*Queue population*] detail, to populate the queue. From the [*New*] button menu, select the [*New folder*] option and specify the pre-configured folder in the [*Contacts*] section for example, ”New customers”. As a result, the contacts, who are included in the selected folder will be added to the queue content. You can edit the content of the static queue by adding or deleting the elements manually. The agent desktop will display the queue content on the [*Contacts*] tab.
10. To form a list of agents to process the queue, go to the [*Team*] tab. Click the [*New*] button and select the required employees. The selected contacts can process the content of the queue from the agent desktop.

> **Attention.** Only those agents who have the [*Active*] checkbox selected on the [*Team*] tab can process the queues. By default, this checkbox is selected for all contacts on the detail. You can clear the checkbox for certain agents. In this case, the queue elements of the queue will not be displayed on the agent desktop for these agents.

Set up regular and blind queues

PRODUCTS: SERVICE CREATIO

The way how the agents will take the data from the queue for processing is determined by the queue type.

By default, the queues are **regular**. This means that an employee can determine the order of processing of records.

You can set up **blind** queues to have the agents process queue elements in a specific order. You can set up blind queues to have the agents process queue elements in a specific order.

This means that all case queues can either be regular or blind. The same applies to contact and account queues.

To set up a blind queue for cases:

1. Go to the [*Queues*] section.

2. Open the [*Queues setup*] view.
3. Select the [*Queue sorting setup*] action in the [*Queues*] section. The [*Queue objects*] lookup will open.
4. Select the "Case" object at the top and click the [*Edit*] button.
5. Select the [*Blind queue*] checkbox in the opened window and click [*OK*].

Sort queue elements

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You can customize the display order of the queue records by applying sorting values for one or several columns of the queue object. For example, you can configure the cases to display in the ascending order of the registration date. The queue priority also influences the way records are sorted.

You can customize queues:

1. By queue priority (if an agent works with several queues with the same queue object).
2. By sorting parameters specified in the object. The parameters configuration applies to all queues generated by the current object.

> **Note.** Learn more about elements sorting order on the agent desktop from the General Agent Desktop settings article.

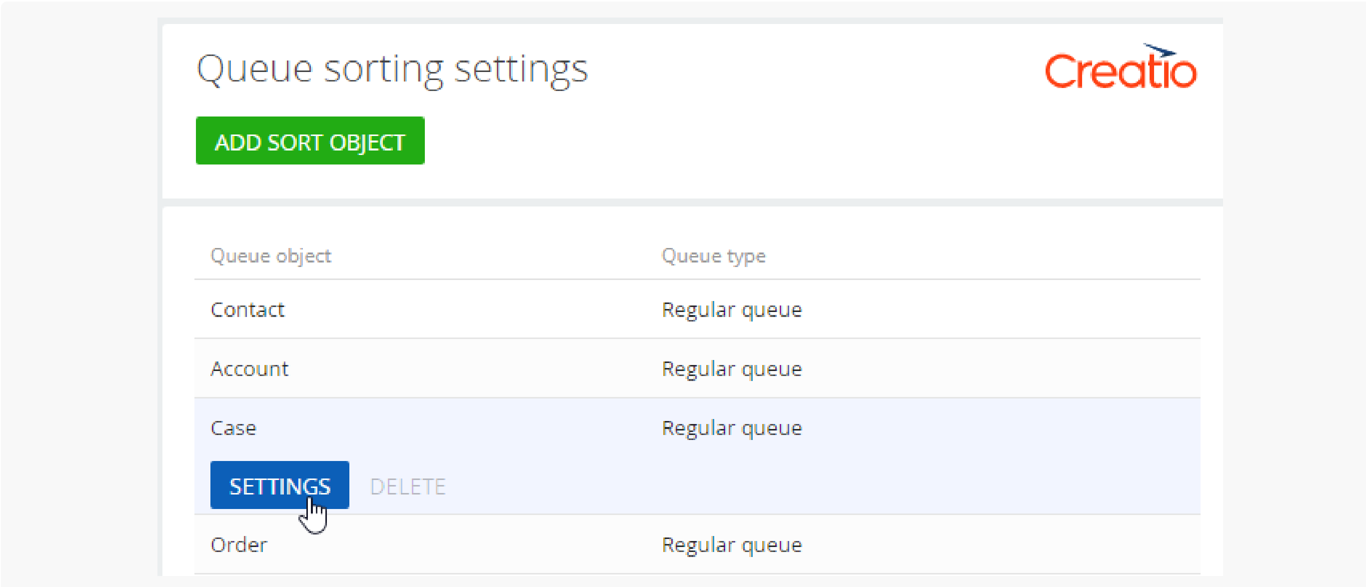
> **Example.** Display cases with a high priority that were created earlier on the agent desktop. To do this, set up the sorting conditions for the cases by priority and then by registration date.

To do this:

To change the sort order, use the and buttons.

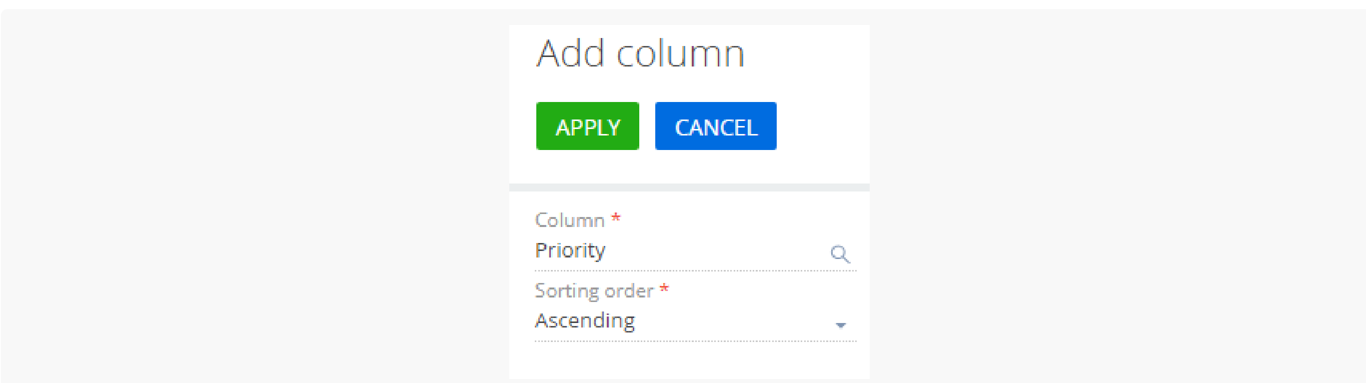
1. Go to the [*Queues*] section.
2. Click to open the [*Queues setup*] view.
3. Click [*Actions*] → [*Queue sorting setup*].
4. Select the “Case” object and click [*Settings*] (Fig. 1).

Fig. 1 – Selecting the object in the lookup



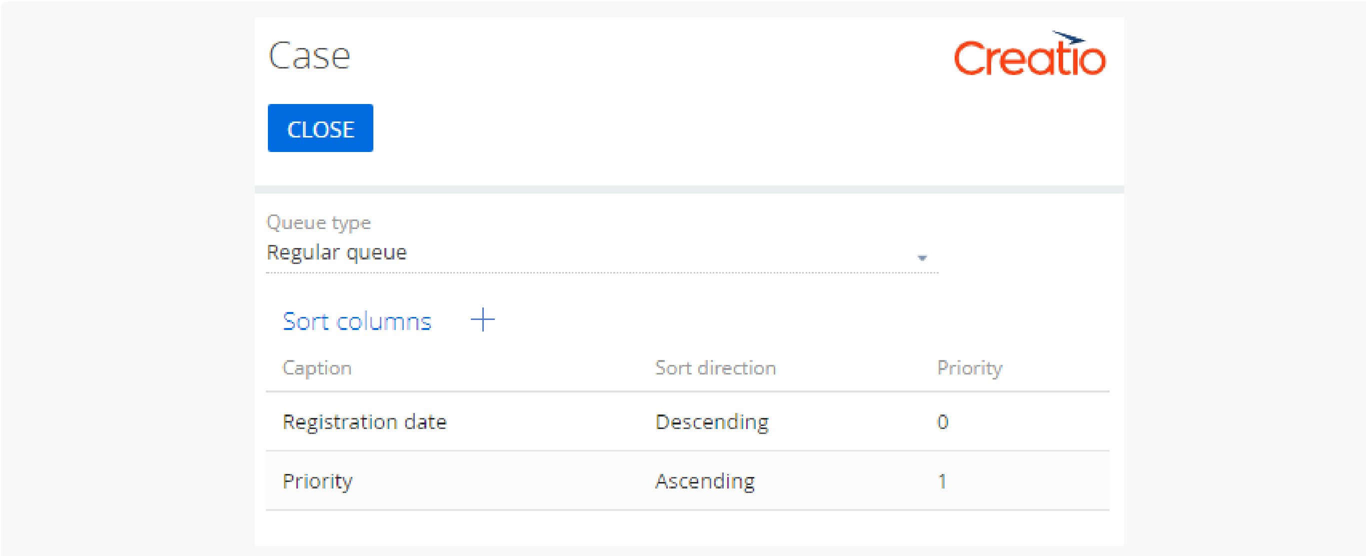
5. n the new window, click [+] to add a case column for sorting. For example, add the [*Priority*] column.
6. Select the “Ascending” sorting order to high-priority cases display first. Creatio will sort the records alphabetically. To sort the records by origin in a specific order, add a number before each entry in the [*Case source*] lookup. For example, “1. Critical", "2. High.”
7. Save the settings by clicking [*Apply*] (Fig. 2).

Fig. 2 – Adding sorting fields



8. Similarly, add the [*Registration date*] column. Use the ascending sorting order.
9. Specify the priority of the columns to sort the records by. The sorting is first performed by the column with a higher position. In this case, Creatio sorts the records by the [*Priority*] column first, then by the [*Registration date*] column (Fig. 3).

Fig. 3 – The sorting order



10. Click [*Close*].

    As a result, the agent desktop will display critical records first, then high-priority records, and so on. The earliest records will be displayed before the latest records of the same priority.