Creatio Academy

Agent Desktop workflows

Version 8.0

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Regular queue workflow

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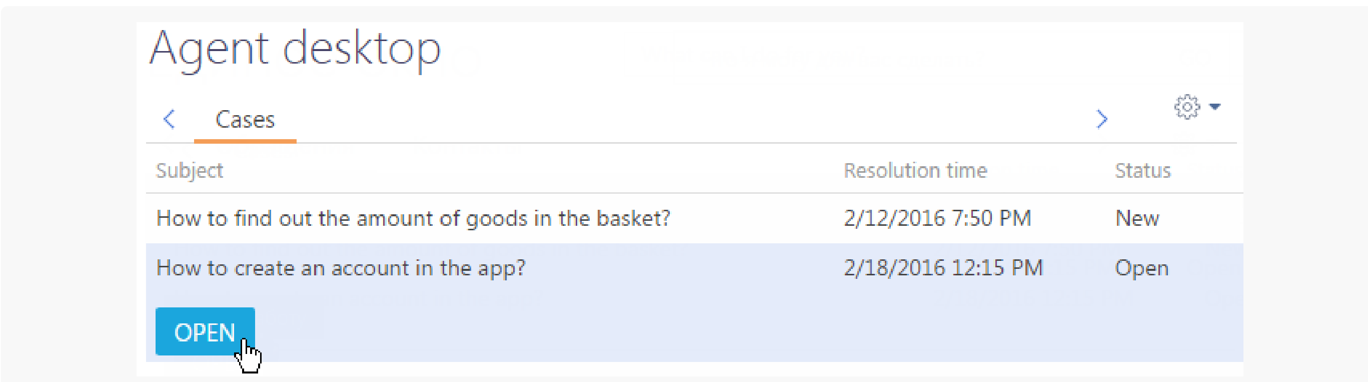
Let's take a look at the typical procedure to process cases via the agent desktop using a regular queue. When an agent takes a case from a queue to process it, the “Agent desktop: Queue cases processing” business process starts.

> **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.

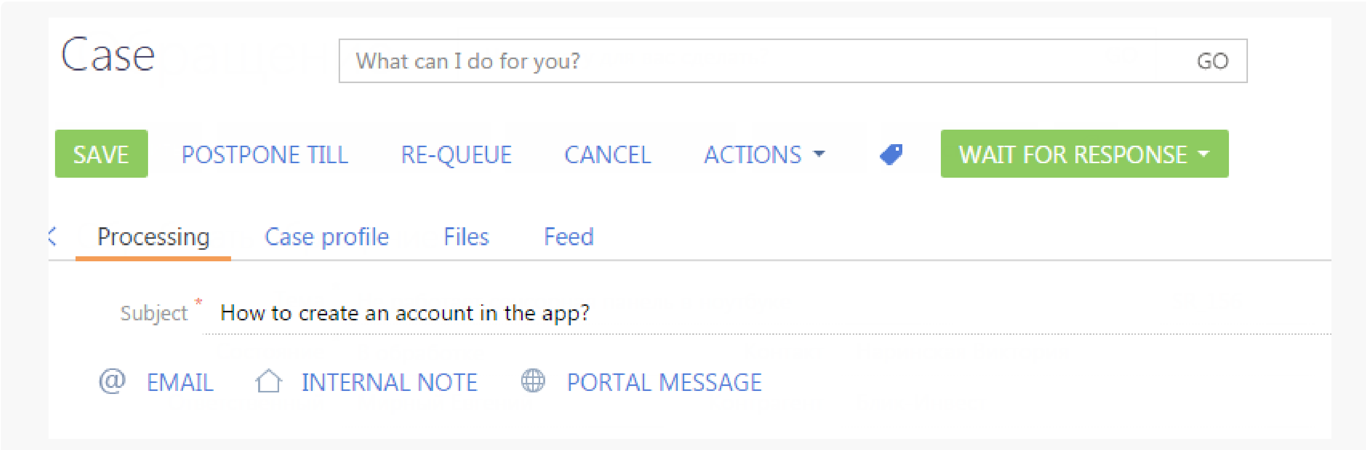
Fig. 1 Taking a case from a regular queue



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.

Blind queue workflow

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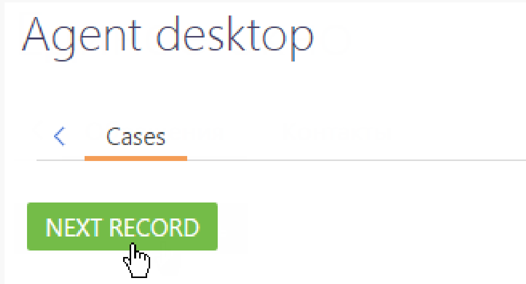
Let's take a look at the typical procedure to process cases via the agent desktop using a blind queue. When an employee takes a case from the queue, the “Processing order in Agent desktop queue” business process is run.

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



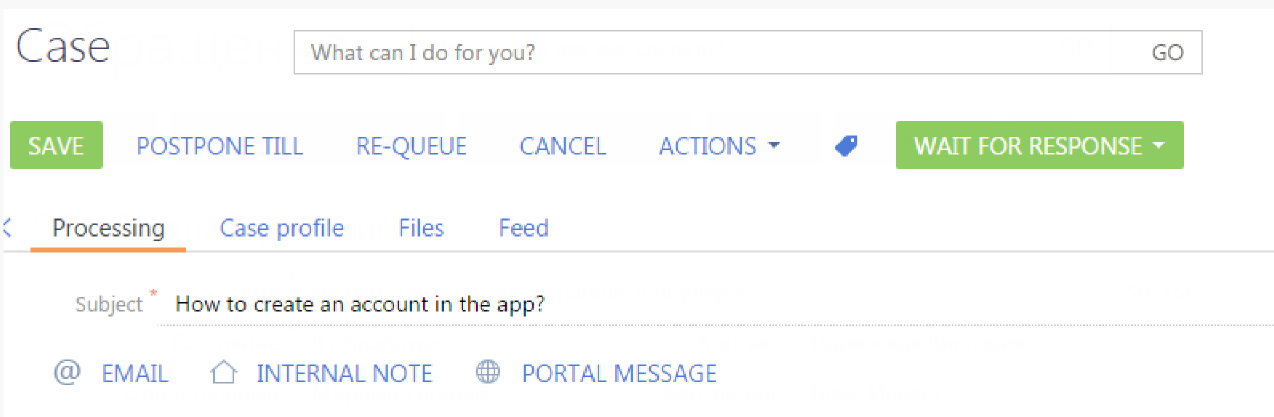
As a result, the page of the case to process next will open. The algorithm used to select a case takes into account the queue priorities and inner sorting rules of a given queue. (Fig. 2).

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.

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.

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.