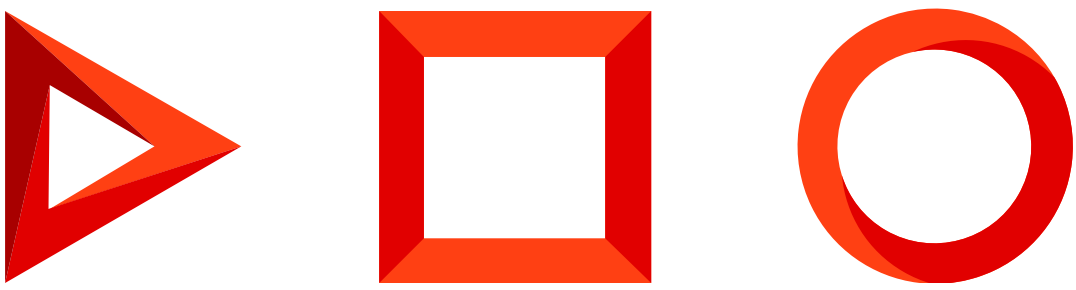
Creatio Academy

# Agent Desktop setup

Version 8.0



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# General Agent Desktop settings

PRODUCTS: SERVICE CREATIO

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.

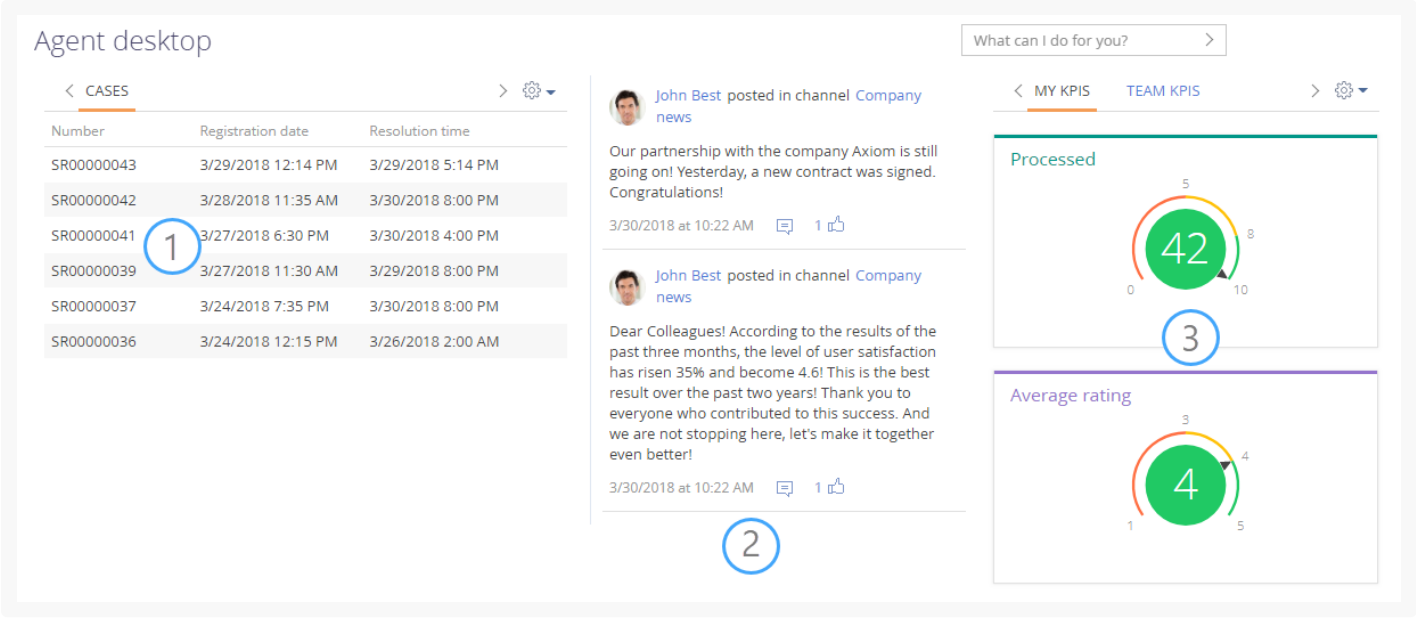
Using the agent desktop an agent can quickly process tickets in the omnichannel mode, manage incoming and outgoing calls, and work with other queue items. In the agent desktop, the employee can read the messages posted on the feed and analytical KPI dashboards of a single employee or the whole team are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

# 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.

# 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".

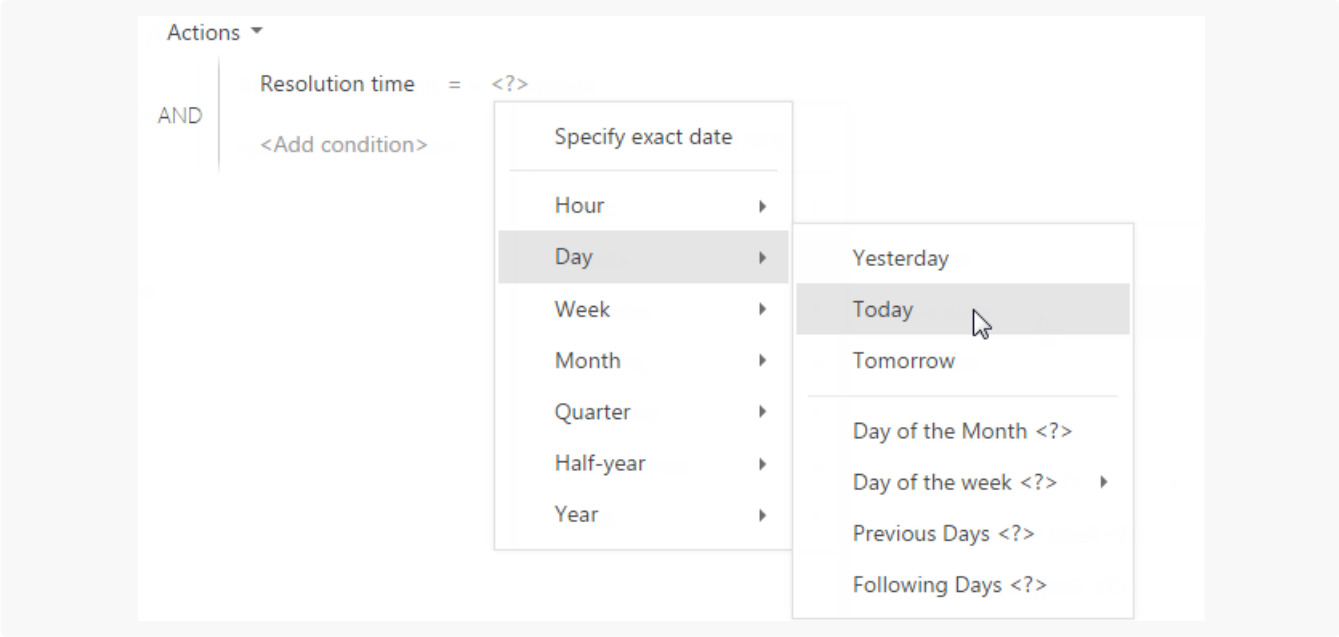
7. Select a business process in the [ *Process* ] field. The selected business process will be run each time an agent takes an element from the queue. Select the “Agent desktop: Queue cases processing” business process for cases.

   **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.

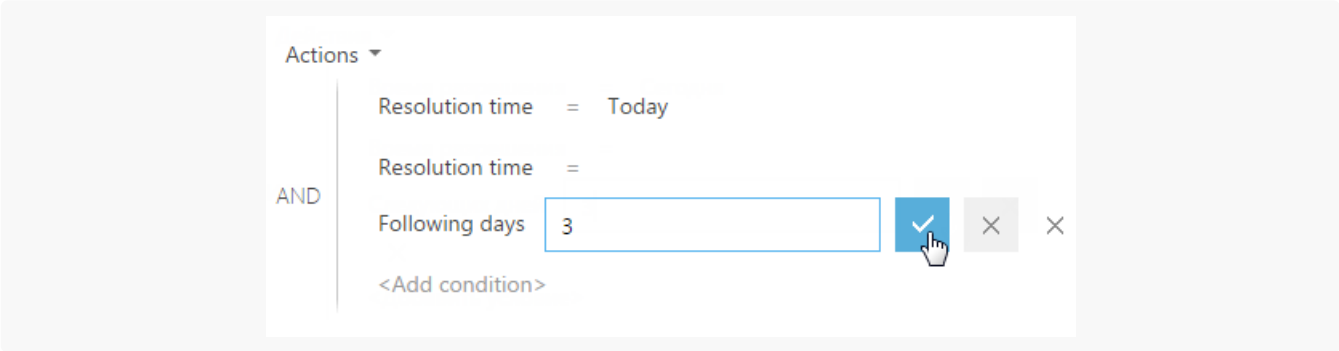
   a. Click the [ *Add condition* ] link and select the [ *Resolution time* ] column in the opened window. Select the value of the condition: "Day → Today”(Fig. 1).

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



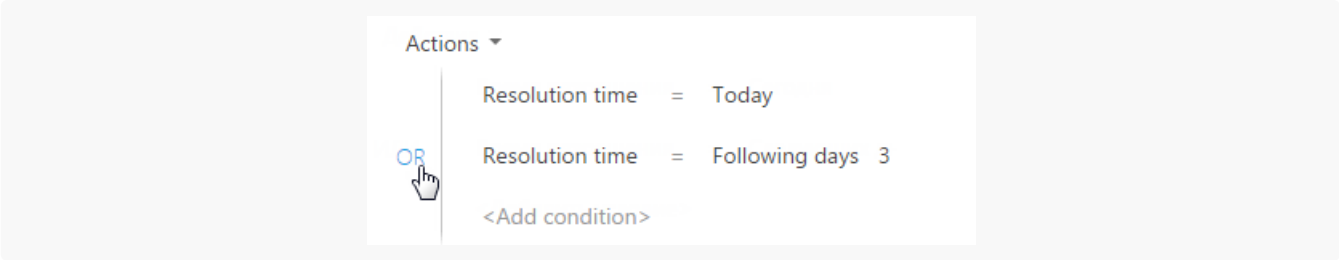

b. Add another filter condition: "Resolution time = Following 3 days" (Fig. 2).

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.

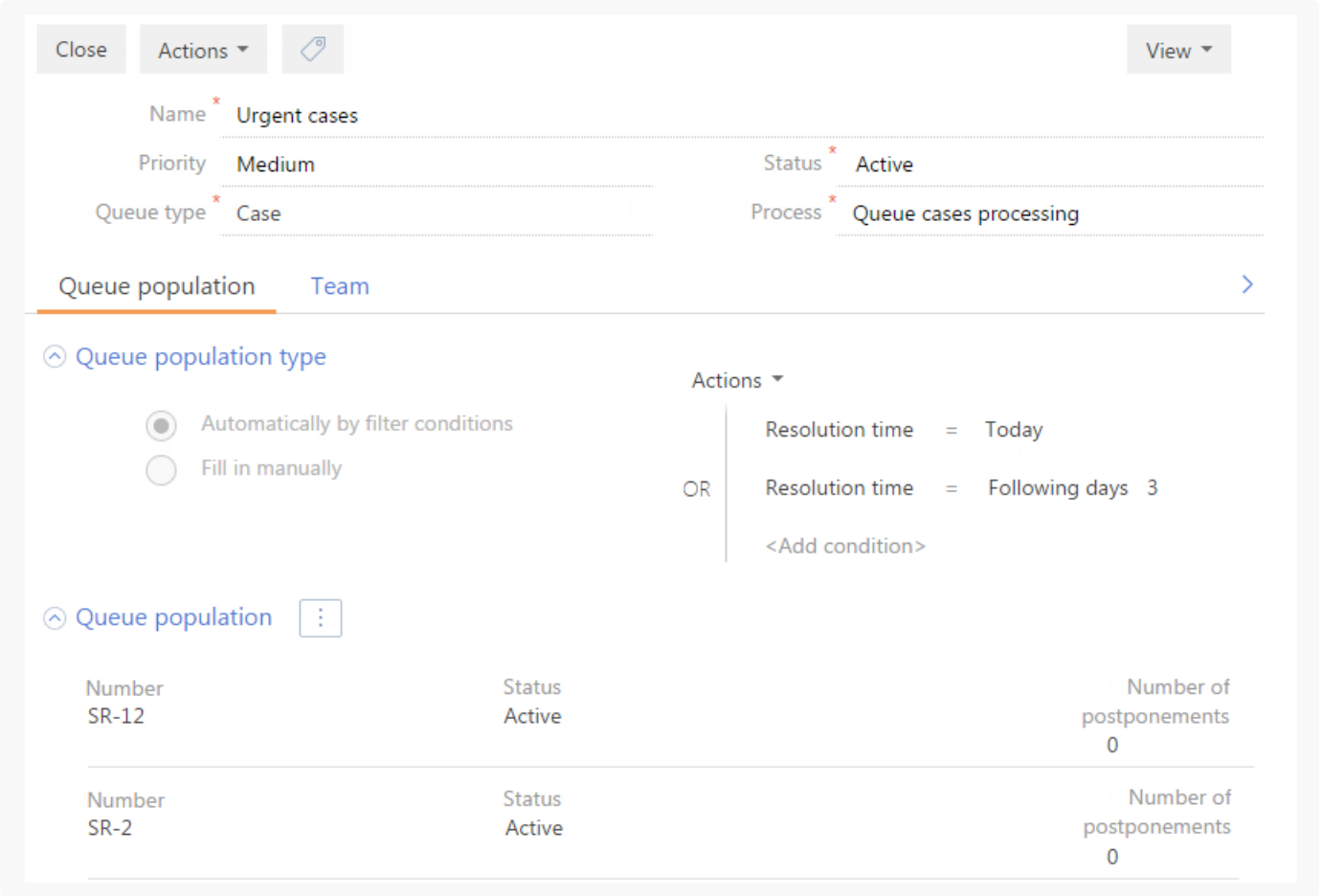
10. To form a list of agents to process objects from the queue, go to the [ *Team* ] tab. Click the [ *New* ] button and select the required employees. The selected contacts can process the content of the queue from the agent desktop.

**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




# 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

PRODUCTS: SERVICE CREATIO

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.

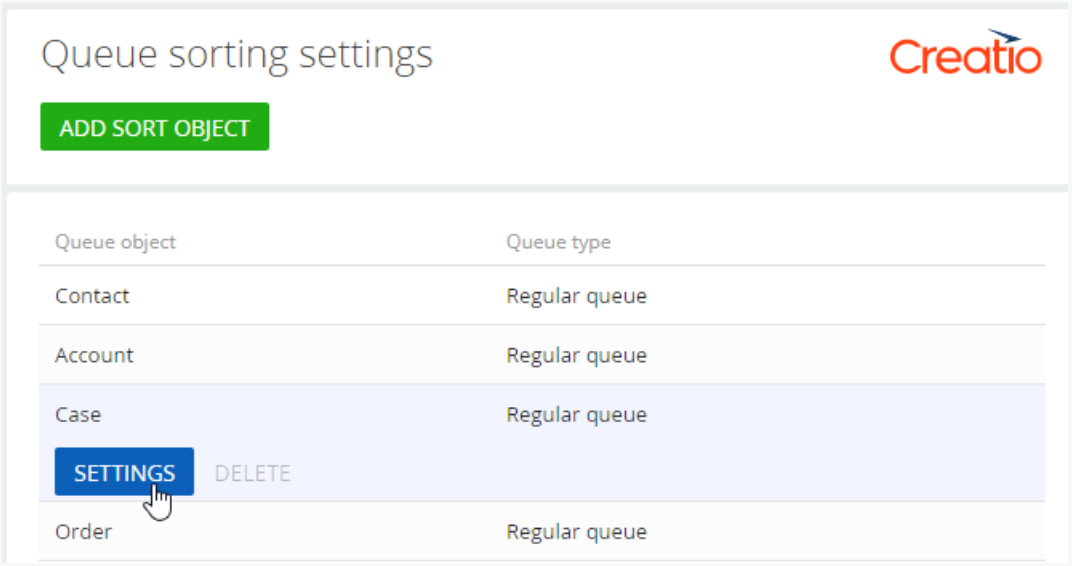
To do this:

To change the sort order, use the ^ and v buttons.

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

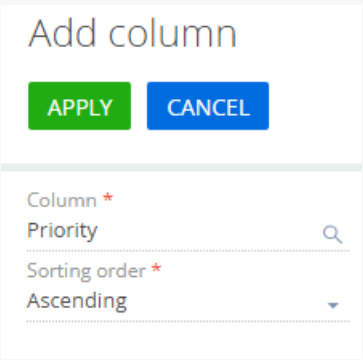
2. Click  to open the [ *Queues setup* ] view.
3. Click [ *Actions* ] → [ *Queue sorting setup* ].
4. Select the “Case” object and click [ *Settings* ] (Fig. 1).

Fig. 1 – Selecting the object in the lookup



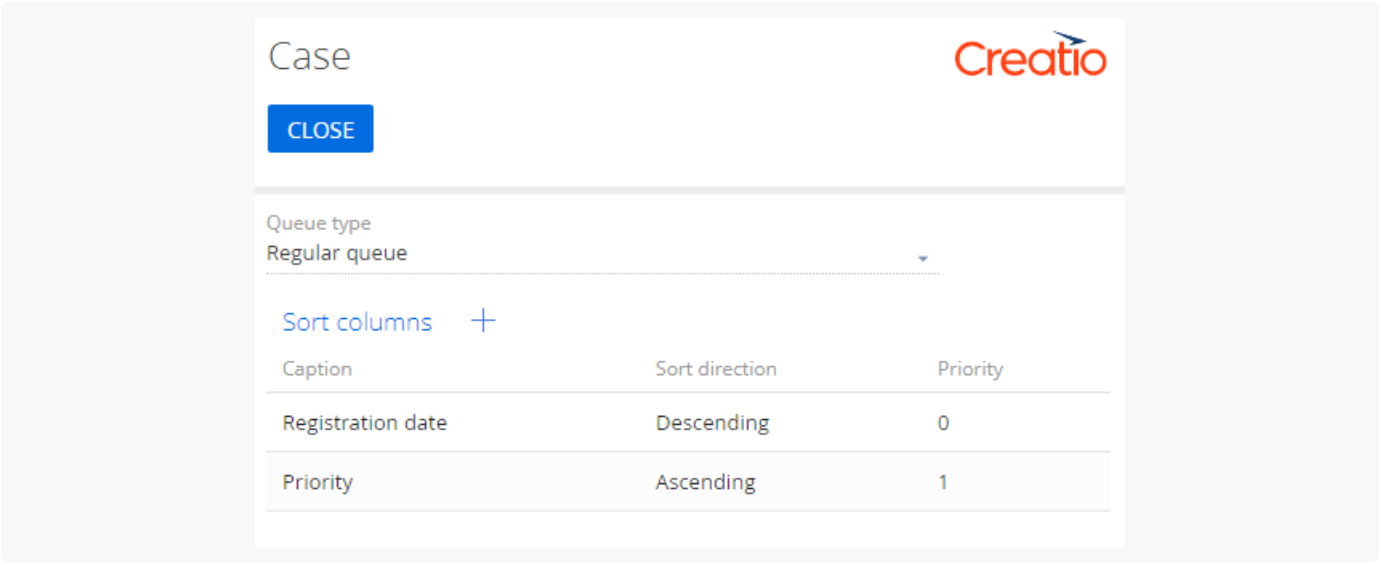

5. n the new window, click [ + ] to add a case column for sorting. For example, add the [ *Priority* ] column.
6. Select the “Ascending” sorting order to high-priority cases display first. Creatio will sort the records alphabetically. To sort the records by origin in a specific order, add a number before 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.