Creatio Academy

Agent Desktop workflows

Incoming call workflow

Version 8.0

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PRODUCTS: SERVICE CREATIO

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.