Creatio Academy

Contact center workflow

Supervisor workflows

Version 8.0

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Supervisor workflows

PRODUCTS: SERVICE CREATIO

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.