XGEN PLUS

Most Advanced Enterprise E-mail

Automated inward Routing (AIR)

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1. Introduction

In today's scenario, customer care plays a critical role in serving the customers. Normally organisations have support IDs as Customer Care or Support or Sales or Enquiry. Normal procedure allows all customers to send a mail to these IDs and expect a fast response. It is easy for a customer to send emails to such support IDs, but what about the Companies/Agents handling these IDs?

Let's consider some scenarios to understand the intensity of the situation.

Scenario 1: Multiple Customer Care Agents
You run a company with a multiple employees working as Customer Care agents and all agents access customercare@yourdomain.com email account. Who is responsible for looking at the Customer Care emails? Do all agents follow and track all the emails received in the Customer Care mailbox? If yes, how do you find out which agent replied to which email? How do you assign the emails to different Customer Care agents? Do you have another ticketing system in place to assign emails to customer care agent?

Scenario 2: Tracking Emails
You are a Customer Care agent working on one particular issue. You are sending your replies through Customer Care Account. How do you track the emails received in response to your replies? Do you dig through the whole Customer Care account mailbox to view your email replies? Are you sure you will not miss any email in this way?

Scenario 3: Performance Monitoring
With so many Customer Care agents working from the same account, how do you make sure load is equally distributed among all agents? Above all, how do you monitor the performance of different agents?

Keeping all the above scenarios in mind, XGen Plus have come up with an in-built assignment module called **Automated Inward Routing - AIR.**

2. What is Automated Inward Routing (AIR)?

Automated Inward Routing, shortly called AIR, is the module through which you can have automated rules to allow one email id of the organisation being served by multiple agents with strict rules and responsibilities assigned to each agent automatically.

Overall functionality of AIR is given in the steps below:

- Customer Care admin creates a rule in Customer Care account to forward all incoming mails to Customer Care group
- Mails coming to Customer Care agent mailbox are automatically assigned to different agents on Round Robin basis
- Agents can view their assignments in their own mailbox through 'Assignments' tab
- Agents can work on the assignments, send replies, add notes & tags for the assignments and even view the history of each assignment individually
- Replies to the assignments are sent through Customer Care account and not through agent's account
- Any mail coming in response to any agent's reply will automatically be assigned to that particular agent
- Customer Care Admin can monitor the workload and performance of each agent through admin tab

3. Automated Inward Routing (AIR)

Automated Inward Routing (AIR) is an assignment module that comes in-built with XGen Plus. AIR gives you freedom from any extra ticketing system and allows easy load distribution and monitoring for your Support/BPO/Customer Care group. Let's see how.

Please note that we have taken the example of Customer Care group for explaining the steps in detail.

- ***Create Group for Customer Care*** –
  Create a group for Customer Care/Support on Domain level and add the agents' email IDs to the group

Fig. 1 XGen Plus - Create a 'CustomerAgent' group on Domain level

Please note that the group will be created through Domain Administrator.

- ***Create a Rule for Customer Care Account*** –
  Once the Customer Agent group has been created, open Customer Care mail account and create a rule for forwarding 'All Mails' to Customer Agent group:

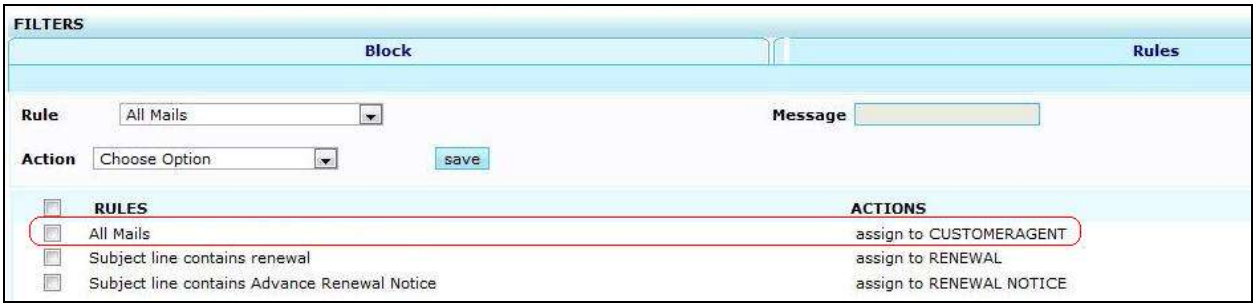

Fig.2 Create a rule to forward all emails to 'CustomerAgent' group

This rule will make sure all incoming mails for Customer Care email account and forwarded to email Ids present in customer care agents on round robin basis.

- ***Customer Care Agent's Assignments*** –
  Customer Care agents can view the assignments (emails) assigned to him/her through 'Assignments' tab

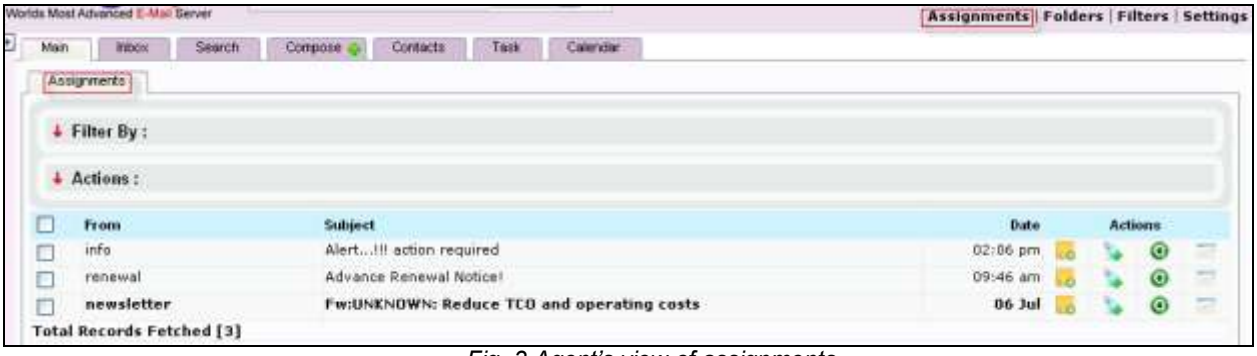

Fig. 3 Agent's view of assignments

- ***Filter By –***
  Customer Care agents can filter the assignments based on date, Account, 'Assigned From', status of assignments and through assignments tags as shown in the screenshot below

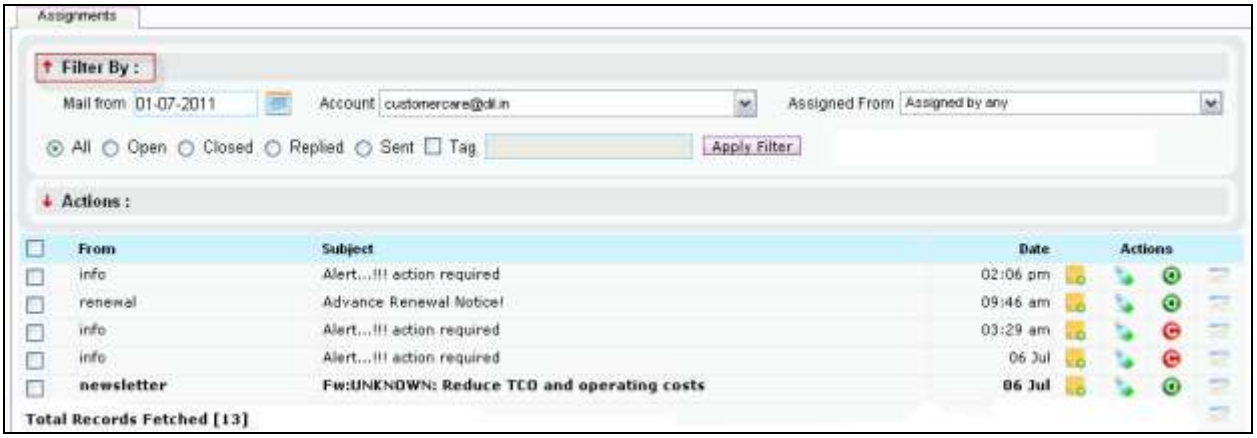

Fig. 4 'Filter By' allows agents to filter assignments

- ***Actions –***
  Agents can take various actions on assignments including assigning to another agent, open/close the assignments or put reminders on assignments.

Fig. 5 Take actions on assignments through 'Actions' window

Assignment actions have been described below in detail.

➢ ***Assign to another agent –***

XGen Plus allows agents to select the assignment(s) and move it to another agent's queue as and when required. So, in case any agent is overloaded with assignments, he/she can easily move assignments to another less overloaded agent's queue.

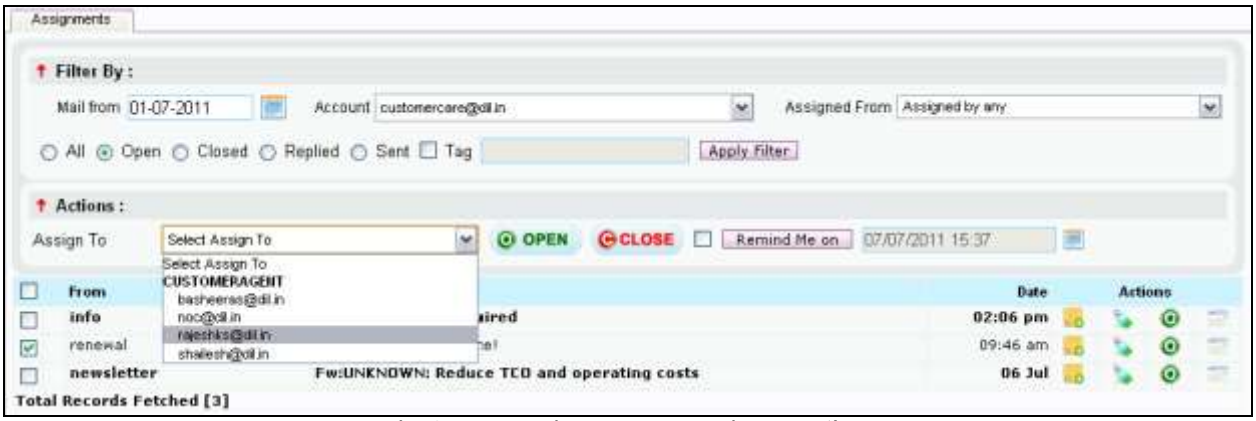

Fig. 6 Move assignments to another agent's queue

Also, this transfer of assignments will be recorded in the history of assignment transferred.

➢ ***Open/Close the assignment –***

Agents can select single/multiple assignments and open/close the assignments from 'Actions' pane.

Fig. 7 Close the selected assignments

Agents can also re-open any closed assignments for further re-work.

Fig. 8 Re-open closed assignments

➢ ***Add reminder for assignment –***

Agents can select any assignment and add reminder to it so as to be reminded about that assignment at a later stage. Agents are shown a reminder pop-up on the scheduled reminder time.

Fig. 9 Add reminders for assignments

- ***Activity Tracking –***

Agents can record any activity done on assignments through Notes, Tags, and History as explained below in detail.

➢ ***Add Notes –***

Agents can add notes to assignments for easy reference later on. Notes can be added by clicking on 'Note' icon ( ) on the right side of assignments. There is no limit on the number of notes added to the assignment.

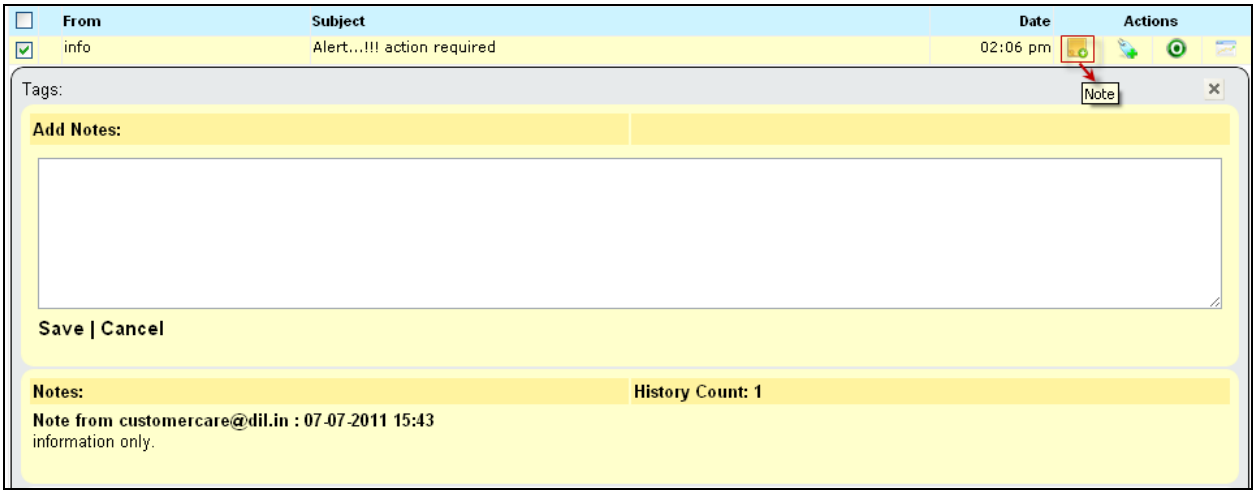

Fig. 10 Add notes to assignments

➢ *Add Tags –*

Agents can add tags to assignments by clicking on 'Apply Tag' icon ( ) present in the right menu of assignments. Agents can also select from pre-defined tags or select their own tags for assignments.

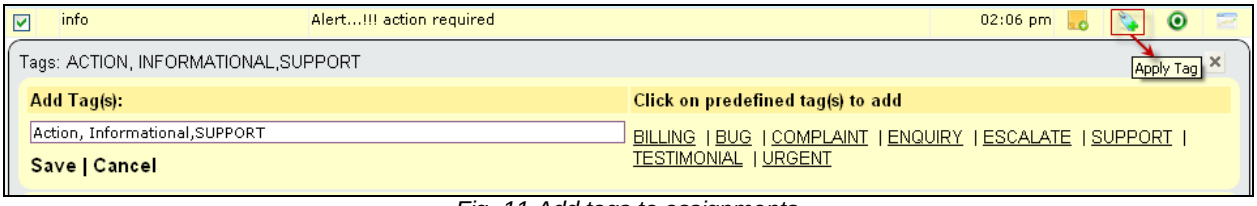

Fig. 11 Add tags to assignments

'Filter By' allows the search of assignments based on Tags added to them as displayed below.

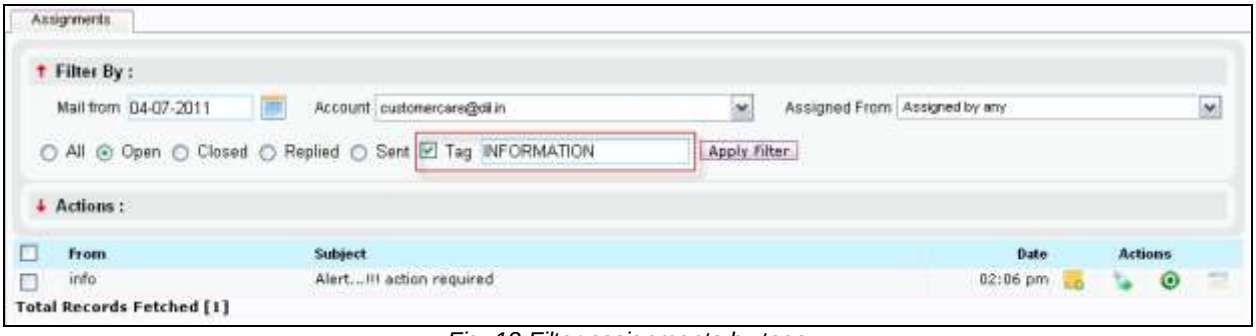

Fig. 12 Filter assignments by tags

➢ *Close/Re-open Assignments –*

Agents can also close or re-open the assignments by clicking on open/close icons (/) present in the right menu of assignments. Agents can close the open assignments after completing work on them as well as re-open any closed assignment for further re-work as required.

Fig. 13 Close assignments by clicking on icon

Fig. 14 Re-open closed assignments by clicking on icon

➢ ***View History –***

Any action taken by the agent on assignment is recorded as history of assignment. E.g. History will record moving the assignment to another agent's queue, addition of tags & notes, opening/closing the assignment. Agents/Admin can view the history of any assignment by clicking on ( ) icon as shown in the screenshot below.

Fig. 15 View Assignment History

- ***Admin Reports –***

Admin can view the tracking report through 'Admin' tab. Admin can see the number of assignments, notes, tags, replies, closed & open assignments for each agent in a tabular form. Admin can also see every agent's remaining work in percentage.

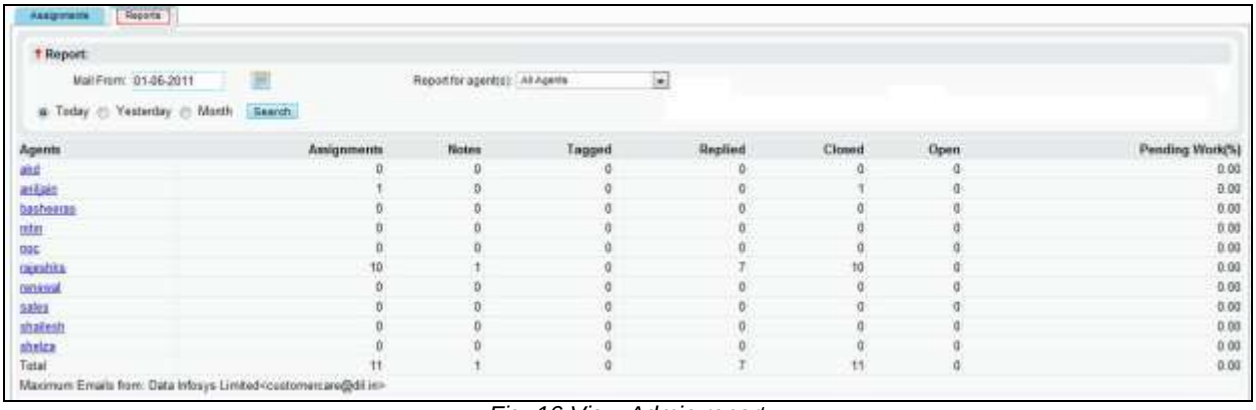

Fig. 16 View Admin report

Admin can also filter the report for individual agent as shown below:

Fig. 17 Filter Admin report for individual agent

4. Conclusion

AIR is a very powerful and useful tool to manage any Customer Care/Support/BPO accounts easily without any extra ticketing system or installation. It automatically takes care of everything – right from assigning work maintaining load distribution to tracking the status of assignments. With AIR, agents will not have to continuously monitor the support mail account and administrators will not have to keep tracking every email and work individually. AIR gives required freedom to agents as well as administrators.

AIR is yet another unique approach of XGen Plus in moving towards perfection and for becoming world's most advanced email server.

For more details regarding AIR and XGen Plus, please visit www.xgen.in.