

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 <u>customercare@yourdomain.com</u> 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

	admin@dil.in Server Administrator Logout			Mails	P Domain
		Server Grou	ps		
Group Name Sav	e	Search Text	P		
List of Groups:-		List of Users of gro	oup : customeragent		
alimali (545)		First Name	E-mail id	Expi	ry Date
Customeragenc (5)		📄 basheera	basheeras@dil.in	12/3	1/20
		m noc	noc@dil.in	12/0	1/12
		🔄 Rajesh	rajeshks@dil.in	12/3	1/20
		📄 Shailesh	shailesh@dil.in	04/2	5/12
		Shelza	shelza@dil.in	12/3	1/20
		Actio	on move to	Gre	oup Name

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:

FILTERS		
	Block	Rules
Rule	All Mails	Message
Action	Choose Option 💌 save	
	RULES	ACTIONS
	All Mails	assign to CUSTOMERAGENT)
	Subject line contains renewal	assign to RENEWAL
	Subject line contains Advance Renewal Notice	assign to RENEWAL NOTICE

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

fds Mol	st Advanced E-Max Server		Assignments	olders	Filters	Settin
Main	intex Search	Compose 🧼 Contacta Task Calendar				
Ast	signments					_
4	Filter By :					
4	Actions :					
	From	Subject	Date		Actions	
	info	AlertIII action required	02:06 pm	10	. 0	-
	renewal	Advance Renewal Notice!	09:46 am	0	. 0	-
D.	newsletter	Fw:UNKNOWN: Reduce TCO and operating costs	D6 Jul	10 1	. 0	22
Tota	Records Fetched [3]					

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

Filter By :							
Mail from D1	07-2011 Televisionercare@dlin	*	Assigned From Assigned by any				1
Ə All 🔿 Op	n 🔿 Closed 🔿 Replied 🔿 Sent 🗌 Tag	Apply Fi	iter				
Actions :							
From	Subject			Date	Act	ions	
info	Alert!!! action required		02:	06 pm 🐻		0	
info renewal	AlertIII action required Advance Renewal Notice!		02± 095	06 pm 📙	-	0	
info renewal	Alert!!! action required Advance Renewal Notice! Alert!!! action required		02: 09: 03:	06 pm 🔀 46 am 🛃 29 am 🔀	000	000	
info renewal info info	Alert!!! action required Advance Renewal Notice! Alert!!! action required Alert!!! action required		02: 09: 03:	06 pm 🔀 46 am 🛃 29 am 🔀 06 Jul 🛃	0000	0000	

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.

Ass	signments									
+	Filter By :									
+	Actions :									
As	sign To	Select Assign To	O OPEN	OCLOSE	Remind Me on	07/07/2011 15:43				
	From	Subject				Dute		Acti	ons	
	info	Alert10	action required			02:06 pm		5	0	2
	renewal	Advance	Renewal Notice!			09:46.am	-	5	0	-
	info	Alert!!	action required			03:29 am	-	5	0	-
Total	Records F	etched [3]								

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.

Assignments								
† Filter By :								
Mail from 01-	-07-2011 📃 Account	customercare@dilin	*	Assigned From Assigned by any				¥
🔿 All 💿 Ope	m 🔿 Closed 🔿 Replied 🔿 !	Sent 🔲 Tag	Apply Fi	lter				
+ Actions :								
Assign To	Select Assign To	· O OPEN OC	LOSE Ren	nind Me on 07/07/2011 15:37				
from	Select Assign To CUSTOMERAGENT basheerat@dli.n			Date		Acti	ons	
info info	noc@dLin	sired		02:06 pm	16	54	0	12.
renewal	shaleshikkigdi.m	ne!		09:46 am	-	5	0	-7
newslette	r Fw:UNK	NOWN: Reduce TCO and operat	ing costs	06 Jul	-0	4	0	-
Total Records Fe	tched [3]							

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.

Main	Indox.	Search Co	ompose 👴	Contacts	Tech	Calendar				
Ass	ignments									
+	Filter By :									
+	Actions :									
As	sign To	Select Assign To		3	. 0	OPEN @CLOSE C Remind Me on 07/07/2011	15.43			
	From		Subject		1	The page at http://mail.dii.in/ says: 💦 🕺	Date	Acti	ons	
-	info		AlertII	l action requi	ired	En you want to close selected conversation?	02:06 pm 🎂	1.34	0	
-	renewal		Advance	Renewal No	ticel		09:46 am 💑	5	0	
	info		Alert!!	l action requi	ired	COK Canal	03:29 am 📙	1	0	
						UT. I WERE				

Fig. 7 Close the selected assignments

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

As:	signments					
٠	Filter By :					
	Actions :					
As	isign To	Select Assign To	OPEN CLOSE CRemind Me.on. 07/07/2011	15.43		
	From	Subject	The page at http://mail.dil.in/ says: ×	Date	Actions	
	info	AlertIII action required	The units must be an annual selected consumption?	02:06 pm 😽	\$ 0	
	renewal	Advance Renewal Notice!	P.O. 2000 Mark 100 LIG-ODDIT Selection COLLAR SERVICE	09:46 am 💦	5 6) =
2	info	Alert		03:29 am 🔣	5 6	1 22
Tota	l Records F	etched [3]	Cance			

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.

+	Filter By :																
1	Actions :																
As	sign Ta	Select Assign To		O OPE	CLOSE	Remind Me	on	07/0	7/20	011 16	5.04			-			
							Go To	o Mar	ith:		lul 2	011		X	-		
3	From		Subject						124	uly 2	011	1			Actio	-	
1	info		AlertIII action requ	ired			Su	Mo	Tu	We	Th	Fr:	Sa			0	
1	renewal		Advance Renewal No	tice!			-		-			1	2	26	34	0	
1	newslette	sê.	Fw:UNKNOWN: Red	uce TCO an	d operating cos	ts	1	4	6	8		8	-	27	2	0	
ota	Records Fe	etched [3]					10	11	12	13	14	15	16	28	100		
							17	1.0	ta	30	21	22	22	20			
							24	25	26	37	28	20	30	30			
							24	40	20	41	20	20	30	30			
							11	1						31			

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 (assignment.

		From	Subject				Date	Acti	ons	
I	~	info	Alert!!! action required				02:06 pm 🔣	S.	0	\mathbf{Z}
ſ	Tag	5:					No	te		×
	Ad	ld Notes:								
	3	ave Cancel								
	No	tes:			History Count: 1					
	No inf	te from customercare@dil.in : ormation only.	07-07-2011 15:43							
1			Eig 1	0 Add not	o to oppignmo	nto				



> 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.

🔽 info	Alert!!! action required	02:06 pm 🌄 💽 🤕
Tags: ACTION, INFO	DRMATIONAL, SUPPORT	Apply Tag ×
Add Tag(s):		Click on predefined tag(s) to add
Action, Information	nal,SUPPORT	BILLING BUG COMPLAINT ENQUIRY ESCALATE SUPPORT
Save Cancel		TESTIMONIAL URGENT
	E : ((A)))	

Fig. 11 Add tags to assignments

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

Azz	ignments						
+	Filter By :						
	Mail from 04-07-2011	Account customercare@dilin	Assigned From Assigned by any				¥
c) All 💿 Open 🔿 C	losed 🔿 Replied 🔿 Sent 🗹 Tag INFORMATION	Apply Filter				
4	Actions :						
	From	Subject	Date		Actio	ans	
	info	AlertIII action required	02:06 pm	10	14	0	-
Tota	Records Fetched	[1]					

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 (\bigcirc / \bigcirc) 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.

			Message from webpage					
+ Filter By :			2 Do you want to close selected conversation?					
+ A	ctions :							
3	From	Subject	Cartos	Date		Act	ions.	
	hiha	Re I Re I Fw 1	failure delivery/Error In Connection: ReadTimeout	12:14 pm	10	5	0	-
2	iube	[Hast :g.mx.m	ail.yahoo.com.]]	23693750				

Fig. 13 Close assignments by clicking on 🤍 icon

Aas	ignmente							
+	Filter By :	6	Message from webpage					
	Actions :		2 Do you want to re-open selected conversation?					
	From	Subject		Oate		Act	ions	
	lube	Re:Re:Fw: [Host:g.mx.m]	OK Cancel	12:14 pm		*	۲	2
1	info	Alert	required	10:16 am	0	14	0	-

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 (

From	Subje	đ		Date	Actions
info	Alert.	.III action required		02:06 pm 🚾	<u>></u> 0 [
Action Histor	у			Actio	n Count(s): 6
Date 07-07-2011	Action Type	Action By	Remarks		
04:20 pm	Tag	shelza@dil.in	Action, Informational, SUPPORT		
04:19 pm	Tag	shelza@dil.in	Action, Informational		
04:19 pm	Tag	shelza@dil.in	Action		
03:42 pm	Notes	customercare@dil in	information only.		
02:06 pm	Open	shelza@dil.in			
02:06 pm	Assign	customercare@dil.in	To : shelza@dil.in		
					Close

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.

* Report							
MailFrom: 01-06-2011	1	Report for agent(s):	AbAgents				
🗴 Today 🗇 Yesterday 🔿 Manth 📑	aandh						
Agents	Assignments	Notes	Tagged	Replied	Closed	Open	Pending Work?
and	0	0	0	0	0	0	0.0
atilat	1	0	0	0	π.	0	0.0
bashearas	0	0	0	0	0	0	0.0
min	0	0	0	0	0	0	0.0
090	0	0	0	0	0	0	0.0
apahia	10	1	0	7	10	0	0.0
contributed.	0	D	0	0	a	đ	0.0
sales	0	0	0	0	a	đ	0.0
shallesh	0	0	0	0	0	0	0.0
abelca	0	Ú	0	0	a	0	0.0
Total			0		11	0	0.0

Fig. 16 View Admin report

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

Assignments Reports							
+ Report:							
Mail From: j01-66-2011	100	Report for agentics	(restsignth -	1			
■ Today © Yesterday © Marth	Search			71			
Agents	Assignments	Notes	Tagged	Replied	Closed	Open	Pending Work(%)
rajeshka	10	1	0	7	10	0	0.00
Total	10	1	D	7	10	. D	0.00
Maximum Emails from: Data Infosys Lin	vted <customerca v@dl.in=""></customerca>						

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 <u>www.xgen.in</u>.