

Howto: Create and Manage Departments

What is a department?

Departments allow you to group your agents into specific knowledge-worker categories, also known as skill-sets. Once agents have been assigned to departments, your account can be set up to route incoming chats to these departments based on a series of rules. Velaro provides comprehensive department support both throughout the chat process, as well as in the administrative reporting.

When your account is initially set up (SMB and Enterprise Accounts), two default departments are created: Sales and Support.

To manage departments, select the Setup : Departments menu option.

Managing your departments

The list on the left hand side of this section shows you the current departments that have been configured for your account.

Adding departments

To add a new department, click the Add option below the list of current departments.

You are then asked to enter the name of that department. While department names do not need to be unique, it is recommended that you give each department an identifiable name that related to your business.

Changing the name of a department

To change the name of a department, select the department from the list, and click the Edit option. You are then provided with the ability to rename the department.

Deleting or Changing departments

To delete a department, select the department from the list, and click the Delete option. After confirming that you do want this department to be removed, it is deleted.

Note: Care should be taken in deleting existing departments. Once the department is deleted, it can not be recovered. If you find that you accidentally delete a department, then you may create a new one with the same name. You will still be required to set up the new department from scratch. In general, if you change a department name, ensure you modify any pre-chat surveys that may rely on the department name being an exact match as well.

Configuring departments

To configure an existing department, select that department from the list. After it is selected you can now manage that department.

Setting the default dictionary

In certain cases, you may be configuring departments that will be staffed to support customers in different languages. In this case, you may select a different default spelling dictionary that is activated when a chat begins. Note that not all the dictionaries listed in this option are automatically included in the Velaro Desktop application. For access to these additional dictionaries, please contact your Velaro account representative.

Managing agents

To add agents to this department, select the agent listed below the Agents Not In This Department list and click the Add Agent option. Multiple agents may be added simultaneously by holding your shift key down and selecting the different agents you want to add to this department. Click the Add All Agents option to automatically include every agent in the list. Once an agent is added to the department, they are removed from this list and placed in the Agents Included In This Department list.

To remove an agent from the currently selected department, click the Remove option to the right of that agent from the Agents Included In This Department list. Click the Remove All Agents option to automatically remove all the agents from this department.

Setting Agent Availability

Velaro allows the agent's chat availability to be set independently within each department. In this manner, agents may make themselves available to chat for some departments, but unavailable to chat for others. The agent always has the ability to set their availability options directly within the Velaro Desktop application, however, you can select their default availability options here by changing the Chat Status value next to each agent.

Last Modified By: Alex, Wednesday, April 22, 2009
<http://kb.velaro.com/KnowledgebaseArticle10141.aspx>

Friday, November 20, 2009