

Creating and managing 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:

1. Log in to your administrative account at login.velaro.com
2. Select Account > Departments
3. Select your department from the 'Working on' drop down

Managing your departments

1. Select Account > Departments
2. Select your department from the 'Working on' drop down

Adding departments

1. Select Account > Departments
2. Select the 'New' button next to the 'Working on' drop down
3. Enter the name of that department
4. Select 'Save'

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

1. Select Account > Departments
2. Select your department from the 'Working on' drop down
3. Change the 'Department name' field
4. Select 'Save'

Deleting or Changing departments

1. Select Account > Departments
2. Select your department from the 'Working on' drop down
3. Select 'Delete'
4. Confirm you would like to delete this department

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 and exact match as well.

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.

1. Select Account > Departments
2. Select your department from the 'Working on' drop down
3. Change the 'Default Dictionary' field
4. Confirm you would like to delete this department

Managing agents

1. Select Account > Departments
2. Select your department from the 'Working on' drop down
3. Select 'Department users' tab
4. Add, remove, or manager your agents active in this department

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.

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