

Approvals

2019-11-25 - Emily Booth - Comment (1) - Product

We are proud to announce the release of Approvals. Approvals will give you more power to streamline & record your approval processes - whether that is gaining your customer's permission or making internal company requests. You can read further about how to create Approval templates [here](#), and how your agents can use Approvals [here](#).

With Approvals, an agent can generate a request manually with just a few clicks.

Let's take the example scenario of a customer requesting a discount on their product training purchase. The agent handling the ticket sees the customer's request & decides managerial approval is required. All the agent needs to do is click on the Approvals tab, select the appropriate request template & submit the request for their manager's consideration.

Depending on how the approval template has been set up by the admin, the agent can select the approvers or the approvers can be pre-set. The agent will have the option to add a description to accompany the request unless this has also been preset.



Once the manager has made their decision, the Approval log is updated & the agent handling the ticket is notified. At no point during the approval process is the agent's ability to converse with the customer interfered. Multiple ongoing requests can be linked to a single ticket.



Comment (1)

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Zsolt Kiss

5 years ago

pretty cool feature!