Approvals

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

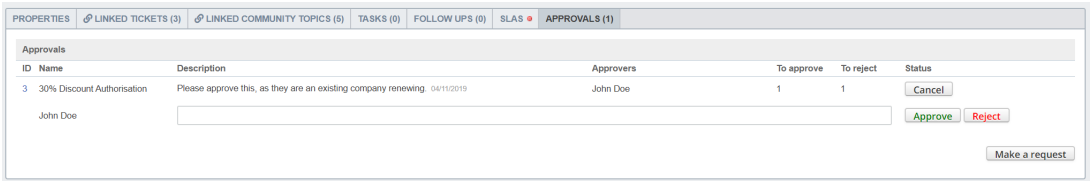
We are proud to announce the release of Approvals. Approvals will give you more power to streamline & record your approval processes - whether that is gaining your customer's permission or making internal company requests. You can read further about how to create Approval templates here, and how your 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 a request has been created, the approver/s are informed & the request is logged on the ticket. To guarantee accountability, the log includes all vital information about the request & its current status. The approver, in this scenario the agent's manager, will be informed by email about the pending request. To ensure security, the manager is required to log into either the agent interface or the Help Center to respond to the request. Regardless of which method is used, the manager can approve or reject the request & submit a text response explaining their reasoning if they wish.



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.

Admins can use Approval Templates to pre-define different approval requests, which can then be automatically applied to tickets using Triggers, allowing you to automate approval requests on certain types of tickets.

Below is a summary of the key capabilities of our new Approvals feature:

- Send approval requests to agent & users
- Send a single request to one or multiple approvers
- Create approval requests which allow the agent to select the approver/s
- Chain approvals together using approval triggers
- Set which agents can raise an approval request

Comment (1)

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Zsolt Kiss

4 years ago

pretty cool feature!