

Creating Shift Patterns in your Helpdesk

Lara Proud - 2024-11-28 - Komentarjev (0) - Business Rules

We wanted to provide some examples of how you can use the new **Shifts** feature, which might provide a basis to help you develop Shift Patterns in your helpdesk.

Shifts let you manage your agents' work statuses and set rules for ticket assignments based on their working hours and availability.

You can access the Shifts menu to create Shifts by, going to **Admin > Workforce Management > Shifts**. For more detailed instructions on creating Shifts in your helpdesk, see the [Shifts Guide](#).

Example 1

Scenario:

You have a group of Agents that work your Customer Support Shift on Mondays and Wednesdays, and work the Tech Support Shift on Tuesdays, Thursdays, and Fridays.

How can you create Shift Patterns that will let the particular Agents move smoothly between the different Shifts, and assign them the relevant tickets based on their schedules?

Example:

The first thing you would do is create **two** Shifts. In this case, the Shifts are these hours:

- **Customer Support Shift** - 09:00 - 18:00 EST.
- **Tech Support Shift** - 09:00 - 18:00 EST.

Which would look like this:

Name*
Customer Support Shift

Timezone*
America/New_York

Set shift pattern as active now
 Set active on
 Deactivate on

Shifts

Monday
09 : 00 to 18 : 00 +

Tuesday

Wednesday
09 : 00 to 18 : 00 +

Thursday

Friday

Saturday

Sunday

Name*
Tech Support Shift

Timezone*
America/New_York

Set shift pattern as active now
 Set active on
 Deactivate on

Shifts

Monday

Tuesday
09 : 00 to 18 : 00 +

Wednesday

Thursday
09 : 00 to 18 : 00 +

Friday
09 : 00 to 18 : 00 +

Saturday








Sunday

For each of these Shifts, you would need to select the Agent or Agents who work this Shift Pattern:

Agents

Agents (4 of 14 selected) Select All

Search

-  Lara Proud
-  Sherlock Holmes
-  Mycroft Holmes
-  Greg Lestrade
-  Hannah Scott
-  James Moriarty
-  John Watson

Now, these **four Agents** are assigned to both shift patterns. They work the Customer Support Shift on Mondays and Wednesdays and the Tech Support Shift Tuesdays, Thursdays, and Fridays.

Next, you want to ensure the Agents receive the correct tickets based on their shifts. To do this, you need to [create a Round Robin](#) that will route tickets based on their shifts, which will look like the below:

The image shows two side-by-side screenshots of the Round Robin configuration interface. Each screenshot has a 'Title*' field at the top, followed by a descriptive text: 'This is the title as it will appear throughout the agent and user interfaces.' Below this are two radio buttons: 'Only assign to agents that are online.' (unselected) and 'Only assign to agents that are Working' (selected). Underneath is an 'Agents' section with a search bar and a list of four agents: James Moriarty, Greg Lestrade, Mycroft Holmes, and Sherlock Holmes, each with a profile picture and a status indicator.

Once you have created these Round Robins, you can set these as **Actions** for the **Set Assigned Agent (Round Robin)** option. Create a [New Ticket Trigger](#) and add the relevant Round Robins to the Trigger Actions.

This screenshot shows the configuration for a ticket trigger. It is divided into two main sections: 'Criteria' and 'Actions'. The 'Criteria' section is titled '3 Criteria' and includes the instruction: 'The criteria section is a list of terms that must match before the actions are applied to the Ticket.' It features a 'When' section with the text 'the following conditions are met:' and a single condition: 'Department is Support'. Below this is an 'Or' section with the text 'when the following conditions are met:' and two empty 'Select...' dropdown menus. The 'Actions' section is titled '4 Actions' and includes the instruction: 'These actions will apply when all of the criteria pass.' It features a 'Then' section with the text 'the following actions will run' and a single action: 'Set assigned agent (Round Robin)' with the target 'Customer Support Round Robin'.

This screenshot shows the configuration for another ticket trigger. It is divided into two main sections: 'Criteria' and 'Actions'. The 'Criteria' section is titled '3 Criteria' and includes the instruction: 'The criteria section is a list of terms that must match before the actions are applied to the Ticket.' It features a 'When' section with the text 'the following conditions are met:' and a single condition: 'Department is Tech Support'. Below this is an 'Or' section with the text 'when the following conditions are met:' and two empty 'Select...' dropdown menus. The 'Actions' section is titled '4 Actions' and includes the instruction: 'These actions will apply when all of the criteria pass.' It features a 'Then' section with the text 'the following actions will run' and a single action: 'Set assigned agent (Round Robin)' with the target 'Tech Support Round Robin'.

Once these Triggers are enabled, new tickets that come into the helpdesk will be routed to the relevant Agents based on the working status for their Shift.

Example 2

Scenario:

You have a core support team that provides excellent support for your department store year-round. But during the holiday rush in December and January, you always receive an influx of tickets, so you employ seasonal support staff to provide out-of-hours additional support Monday through Friday from 18:00 - 23:30.

How can you create a Shift that will assign tickets to the seasonal support team based on their working hours, and add this additional support to the helpdesk at the beginning of December, and automatically stop at the end of January when the busy period has passed?

Example:

Firstly, you can create a Shift pattern for your seasonal staff, that can be activated and deactivated on dates you specify.

To do this, select the **Set active on** option, which lets you choose the specific date that the Shift will begin from. And then you can enable the **Deactive on** option, where you can choose the date that the Shift will stop operation from.

Name*

Seasonal Support Staff

Timezone*

America/New_York

Set shift pattern as active now

Set active on

01 Dec 2023



Deactivate on

31 Jan 2024



Shifts

Monday

18

: 00

to

23

: 30

+

Tuesday

18

: 00

to

23

: 30

+

Wednesday

18

: 00

to

23

: 30

+

Thursday

18

: 00

to

23

: 30

+

Friday

18

: 00

to

23

: 30

+

Saturday

Sunday

Then

you want to assign tickets to your seasonal support team based on this shift. To do this you will need to create a Round Robin, add the Agents from the Seasonal Support shift, and enable the **Only assign to agents that are working** option.

Title*

Seasonal Support Round Robin

This is the title as it will appear throughout the agent and user interfaces.

Only assign to agents that are online.

Only assign to agents that are Working

Agents

🔍 Search Agents

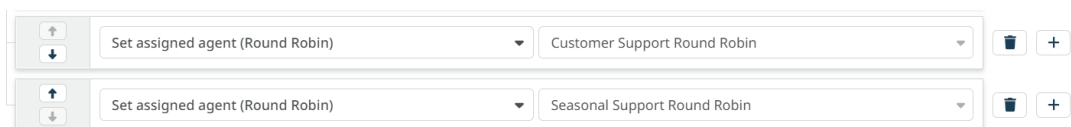
👤 James Moriarty

👤 Greg Lestrade

👤 Mycroft Holmes

👤 Sherlock Holmes

Then you will need to go to your **New Ticket Trigger** that assigns your customer support tickets and add the Seasonal Support Round Robin to the Trigger Actions alongside your current Support Team.



Assuming that your current support team Round Robin runs based on work status, then the Trigger will assign tickets to your Support Team during their shift, and once their shift ends the assignment will seamlessly transition to routing tickets to your Seasonal Support Team when their working hours begin.

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- [Agent Shifts](#)
- [Agent Shifts](#)