I. Agent Management Module

1. Introduction

The Agent Management page provides administrators with a powerful tool to manage the workload and availability of agents in the system. By setting working hours and capacity limits, administrators can ensure that agents are not overloaded with leads and that leads are assigned to agents who are available to handle them.

2. Page Layout

The Agent Management page is divided into several sections:

A. Agent List: This section displays a list of all agents in the system, along with their current state (on or off) and capacity (the maximum number of leads that could be assigned to them).
B. Filtering: The page provides several filtering options to help administrators narrow down the agent list, including filtering by agent name, state, email, branch name, or changing the order based on the creation date, or last update date in either an ascending or descending order.

3. Agent States

Agents on the Agent Management page can have two different states:

On: Agents who are "on" are available to receive new leads.

Off: Agents who are "off" are not currently available to receive new leads.

4. Edit page

The edit page contains many sections regarding the agent’s personalized settings, which are:

A. Capacity: The capacity section of the page allows administrators to set the maximum number of leads each agent can handle. Once an agent reaches their capacity, they will no longer receive new leads until they complete some of their existing assignments.

To *set an agent's capacity*, follow these steps:

1. Find the agent you want to update in the agent list.
2. Click the "Edit" button next to the agent's name

3. In the "Lead Capacity" section, enter the maximum number of leads the agent can handle for the specified period of time, the details are as follow:
   Lead Cap: Maximum assigned leads overall leads in the system.
   Lead Cap / Monthly: Maximum assigned leads during the current month.
   Lead Cap / Weekly: Maximum assigned leads during the current week.
   Lead Cap / daily: Maximum assigned leads during the current day.
4. Click the "Save" button to apply the changes.

B. Normal contacted expiration period (Min)

This setting allows you to specify how long a lead will continue to be assigned to an agent until the agent contacts that lead. This setting is located in the agent profile editing page, which can be accessed by clicking on any agent from the agent management page and then clicking on the "Edit" button.

C. Working Hours: The working hours section of the page allows administrators to set the dates and times that agents are available to accept new leads. Administrators can set different working hours for each agent.

To *set an agent's working hours*, follow these steps:

1. Find the agent you want to update in the agent list.
2. Click the "Edit" button next to the agent's name.
3. In the "Working Hours" section, select the date and times that the agent is available to accept new leads.
4. Click the "Save" button to apply the changes.

II. Rotation Schema Module

1. Introduction

The "Rotation Criteria" page is a module within the PSI CRM system that allows you to specify the rules for how leads are assigned to agents. This page can be accessed by navigating to the "Rotation Criteria" section from the main menu.

Once on the page, you will see a list of all the rotation criteria that have been set up in the system. Each rotation criteria is identified by a unique order number and a label. You can view the details of each rotation criteria by clicking on its name and then" view".

Within each rotation criteria, you can specify the rules for how leads are assigned to agents. This includes setting up criteria based on lead location, lead language, lead type, and other attributes, you can set up a custom rule that matches exactly your needs.

Additionally, you can set up rules for how leads are distributed among agents. This includes setting up rules for how leads are assigned based on agent capacity and availability.

Once you have set up your rotation criteria, you can save them and they will be applied to all leads that come into the system going forward when enabling the “Send to rotation” field. You can also edit or delete rotation criteria as needed.

Overall, the "Rotation Criteria" page is an essential module within the PSI CRM system that allows you to customize the rules for how leads are assigned to agents. By setting up the right criteria, you can ensure that leads are assigned to the most qualified agents and that your lead assignment process is optimized for efficiency and effectiveness.

2. Creating a new Rotation Criteria

You can create new rotation criteria by pressing on “New rotation criteria”, and then you can advance to create a new rotation with filling in all the needed fields to pick your accurate rules in order for the leads to be assigned to the most qualified agents.

In order for the lead to be suitable for a rotation, The Rotation rules (criteria) must all match the lead’s info and the lead stage must be set as New in order to become assigned to the suitable agent based on the rotation settings, the details are as follows:

3. Rotation Criteria Functionality & Example

Assume we created new rotation criteria named “SystemTestWessam”.

The “SystemTestWessam” rotation has a:

Rotation label: SystemTestWessam

Lead Type: Buyer

Lead Class: VVIP

preferred language: English. (Matches with the contact inside of lead), if they are not matched the rotation won’t include that lead.

Referred bys: Wessam Lahloub and Wessam RolesTest Agents, The schema will only involve the leads that are created by (referred by) “Wessam Lahloub” and “Wessam RolesTest” Agents, if there leads matched all schema’s conditions.

Price range: Between 10,000 and 100,000.

Bedrooms: from 0 to 10.

Bathrooms: from 0 to 10.

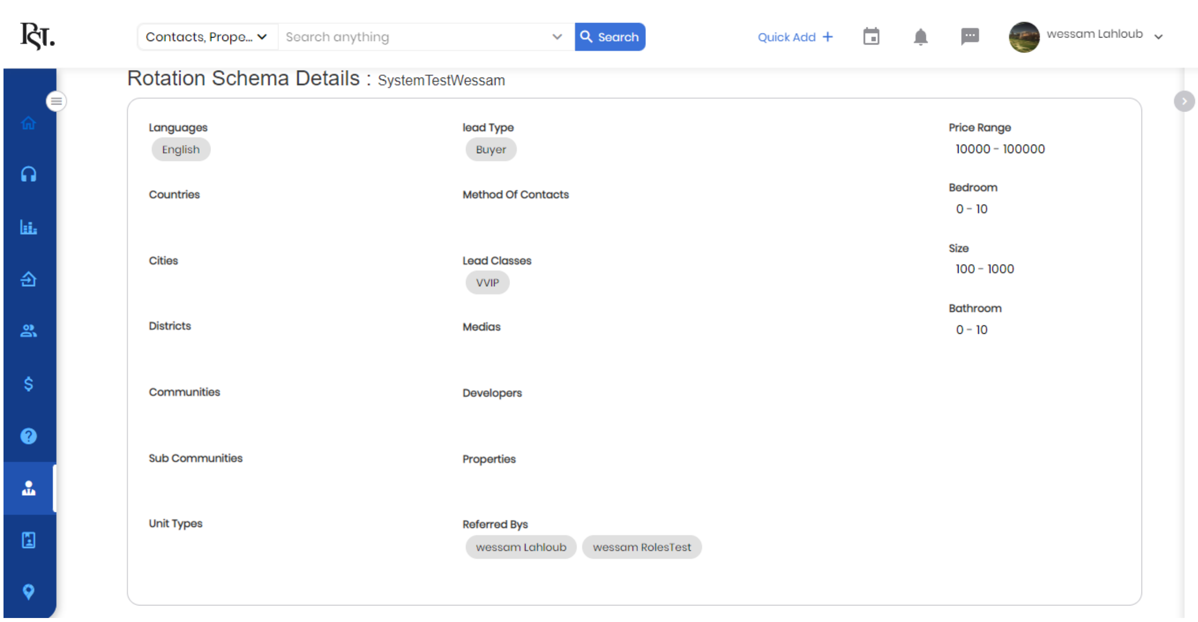
size: Between 100 – 1,000.

finally, the State of the rotation is Active.

Note

The location fields, including Country, City, District, Community, and Subcommunity, are designed to accept multiple selections without a specific sequence. This means you can choose multiple options independently. For example, you can set the rotation criteria to include leads from both UAE and KSA countries, as well as leads from Cairo City.

or just leads from a specific community without filling a country nor a city.



4. Schema Setting

Schema Setting assists in specifying the suitable lead distribution method among the referred bys agents (agents who created the leads).

There are two factors to control the leads distribution mechanism, which are:

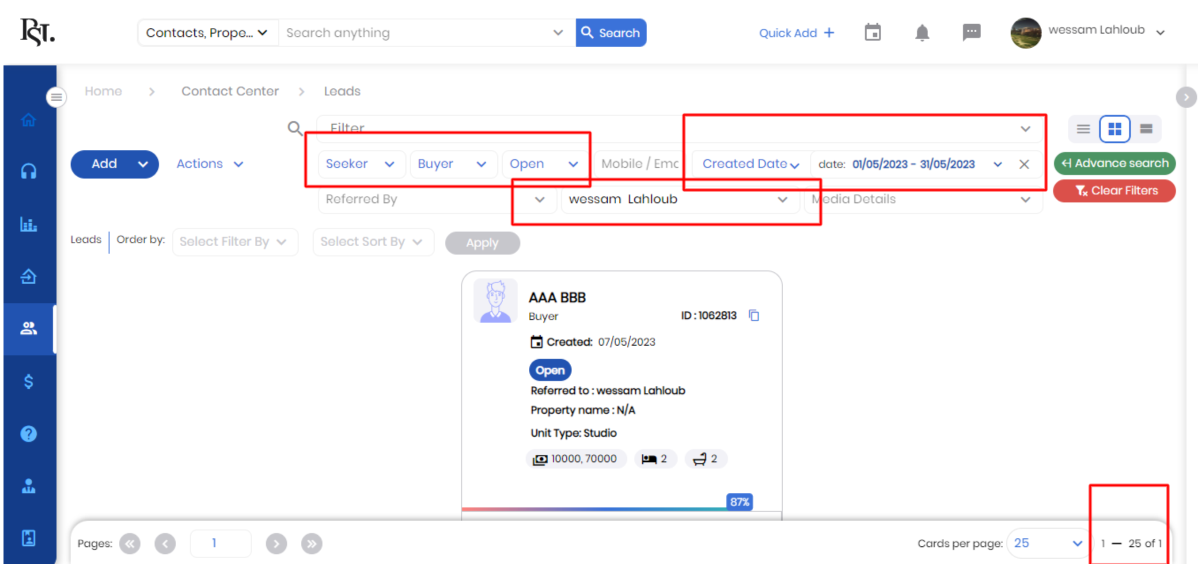
A. Count Based On

This factor Controls the way the schema will count the leads that all the “referred by” agents have, It helps admins to pick the most suitable way to distribute leads that enters the schema between sales/lease agents.

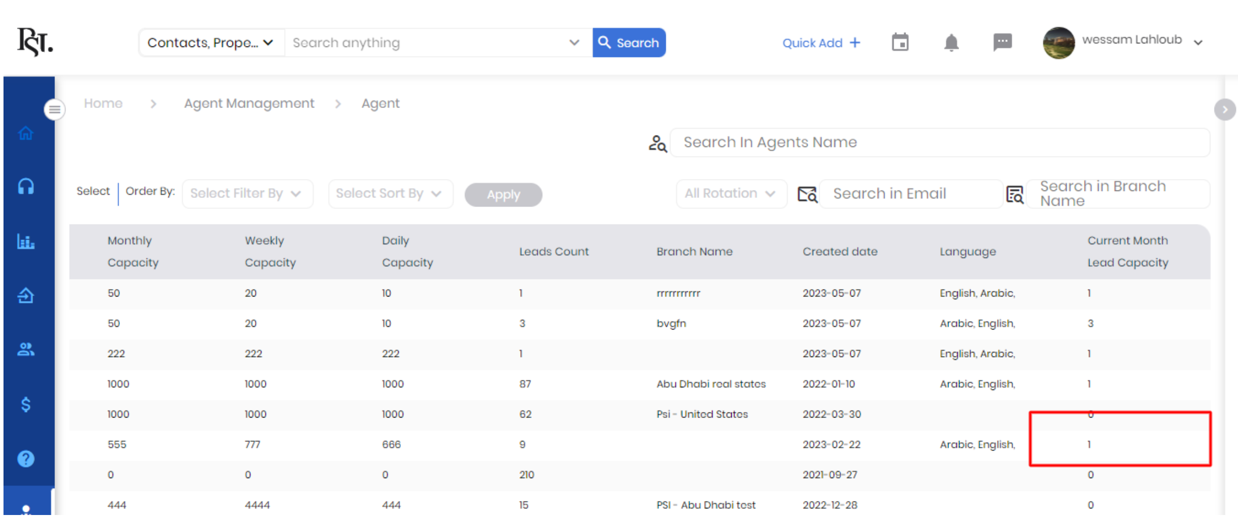
There are three options available for configuring this factor, and we can select the one that best fits our needs. These options are:

a. Overall System

This option Counts the Total open leads during the current month only for all the referred bys agents, we can find the total open leads for agents by Navigating to the Contact Center module → Leads, then setting the following Filters:



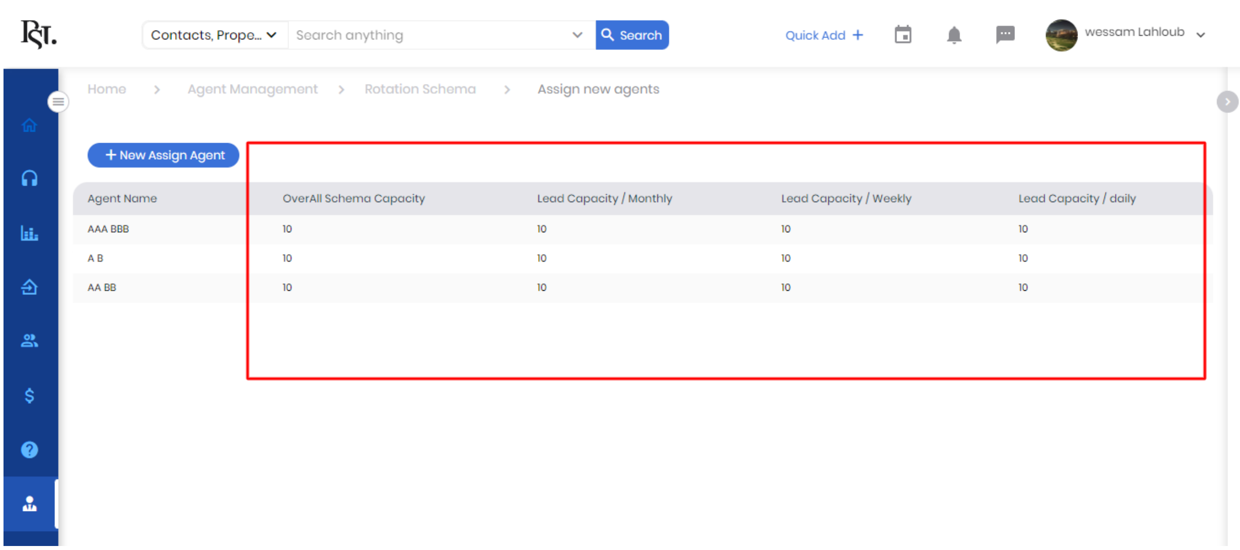
Or it can be seen from the Agent Management Module → Agent and then navigating to "Current Month Lead Count" field, As shown in the next image:



Monthly Capacity	Weekly Capacity	Daily Capacity	Leads Count	Branch Name	Created date	Language	Current Month Lead Capacity
50	20	10	1	rrrrrrrrrr	2023-05-07	English, Arabic,	1
50	20	10	3	bvgfn	2023-05-07	Arabic, English,	3
222	222	222	1		2023-05-07	English, Arabic,	1
1000	1000	1000	87	Abu Dhabi real states	2022-01-10	Arabic, English,	1
1000	1000	1000	62	Psi - United States	2022-03-30		0
555	777	666	9		2023-02-22	Arabic, English,	1
0	0	0	210		2021-09-27		0
444	4444	444	15	PSI - Abu Dhabi test	2022-12-28		0

b. Current Schema Assigned

This option Counts the leads that only got assigned to the agent from the current schema, regardless of the total leads number assigned to the agent manually in the CRM, Lead capacities here can be set and edited by navigating to Agent Management Module → Rotation Schema → Click on your schema and then on “Manage Agents”.



c. Current Schema Active Leads

This option Counts the leads that only are active (Open) and assigned to the agent from the current schema, regardless of both the total leads number assigned to the agent manually in the CRM, and the number of leads that got assigned to the agent and then got lost (there status transferred to closed, Lead capacities here can be set and edited by navigating to Agent Management Module → Rotation Schema → Click on your schema and then on “Manage Agents”, same as the previous one.

B. Cap Based On

The "Cap Based on" or "Capacity Based on" option enables the administrators to select the criteria for determining the highest limit of work capacity for the agents who are assigned to the criteria, there are two methods to do that which are:

a) Overall System

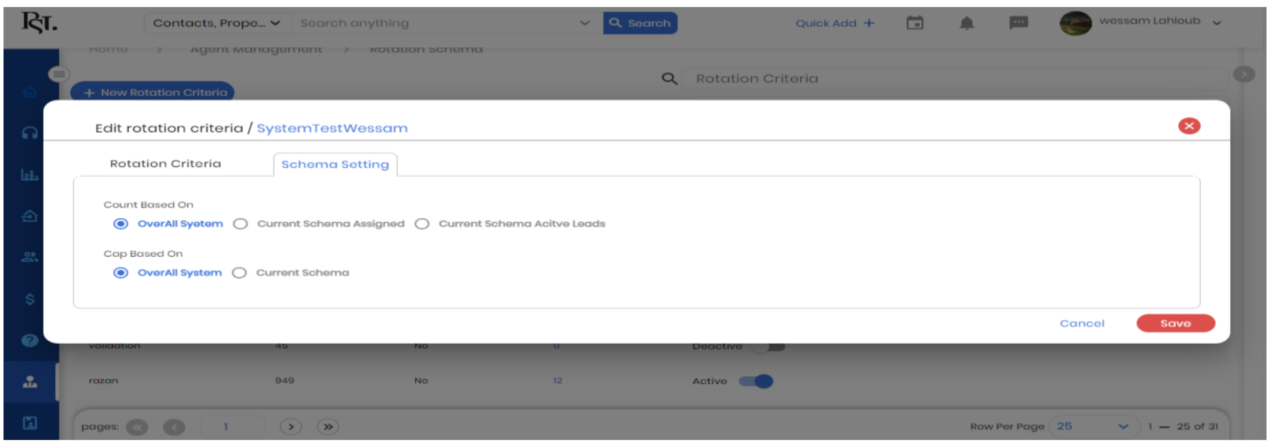
Selecting the "Overall System" method for the "Cap Based on" setting means that each agent’s capacity will be calculated based on the overall system limit which can be picked from the agent management module → agent → press on any agent and then “Edit”, This means that the maximum number of leads that an agent can handle will be determined by the specified cap number inside of the agent’s edit option.

b) Current Schema

When choosing the "Current Schema" method as the "Cap Based on" setting for your agent, it means that your agent's capacity will depend on the caps that you set from the "Managed Agents" option. You can access the "Managed Agents" option by clicking on the same schema that you are currently working on → Manage Agents.

5. Setting Up the Agents for Rotation

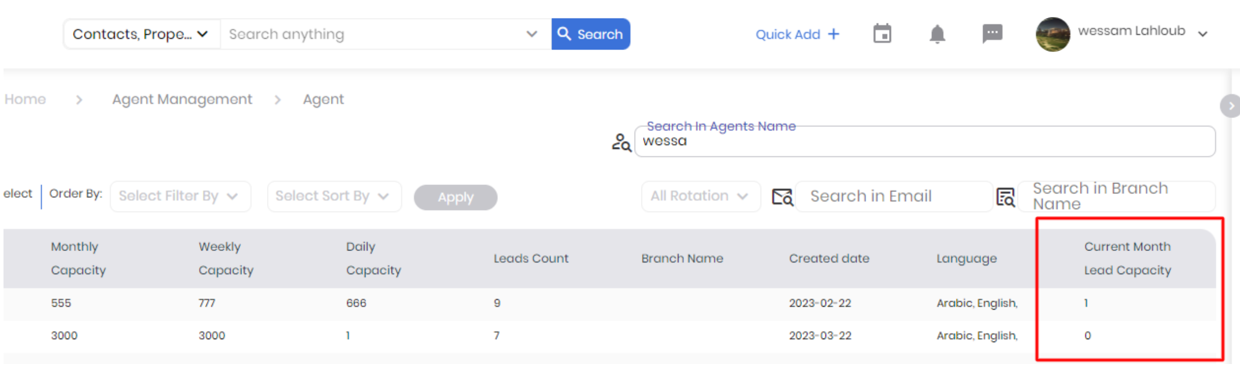
In SystemTestWessam example, we picked our count based on to be OverAllSystem, and our capacity Based On to also be OverAllSystem, means that the count will include all open leads during the current month and the capacity will be picked and edited from the agent's tab inside the agent management module.



Lead's Count for Wessam Lahloub Agent is 1 Lead inserted during this month (May)

Lead's Count for Wessam RolesTest Agent is 0 Leads during this month (May), This is the agent that will get the next inserted lead in the rotation (will get assigned to it).

The following is a picture for both of their Lead's counts, this can be seen from the Agent Tab → Current month lead capacity.

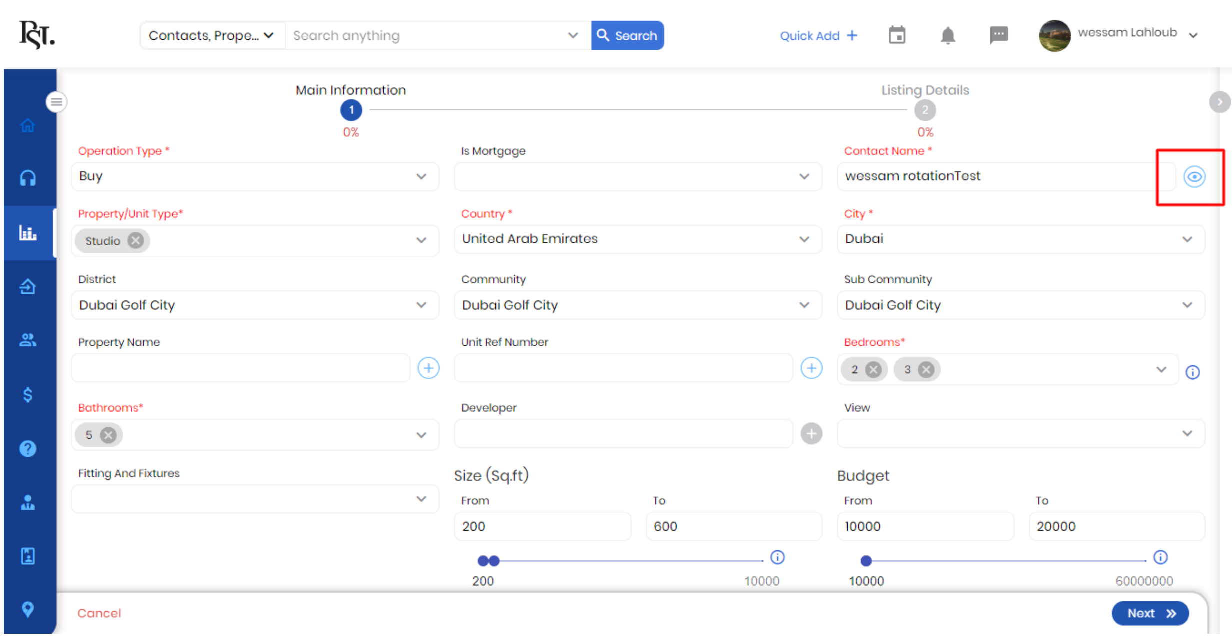


Monthly Capacity	Weekly Capacity	Daily Capacity	Leads Count	Branch Name	Created date	Language	Current Month Lead Capacity
555	777	666	9		2023-02-22	Arabic, English,	1
3000	3000	1	7		2023-03-22	Arabic, English,	0

After we prepared the rotation schema, set the agent's working hours, dates, and capacities, and picked the most effective lead distribution method for agents, it's time to create a lead, send it to the rotation, and notice the efficiency of this functionality.

In order for the Lead to enter the rotation and get assigned to one of the specified agents in it, it needs to meet all of the rotation's arguments, which are:

1- The Lead must be a seeker lead.
2- The operation type must be Buyer as in the rotation's Lead Type.
3- The Lead class of Contact assigned to the lead must be a VVIP class, which can be checked by clicking on the "Eye" icon beside the contact's name



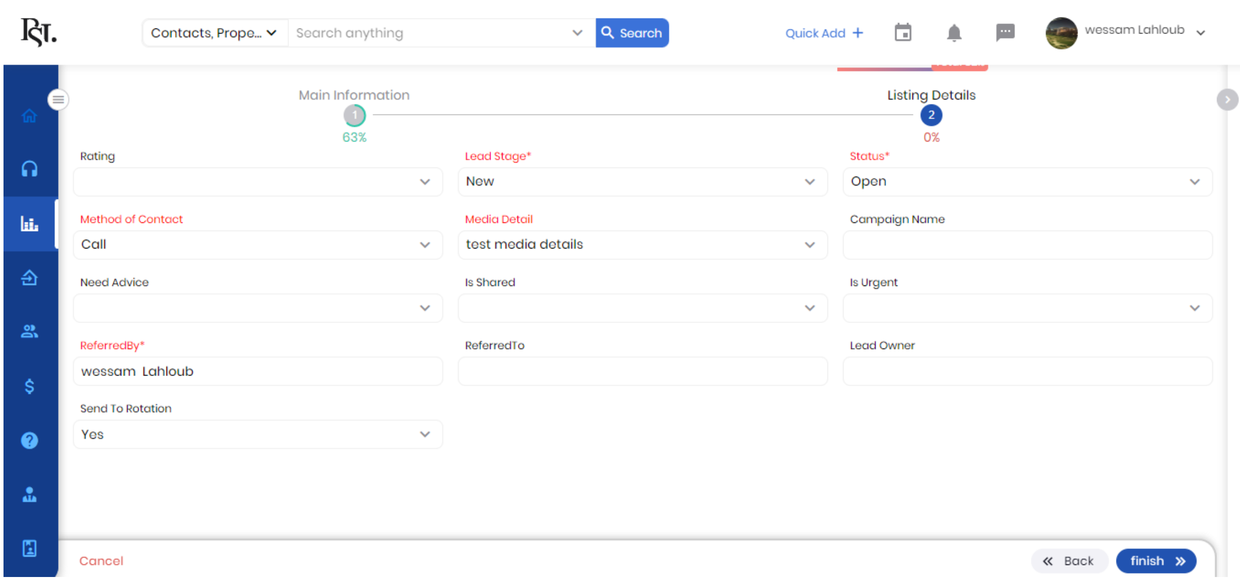
4- Property/Unit type can be anything because we haven't picked any specific unit type for it in the schema.
5- The location can be anything because we haven't picked any country, city, district, community, or sub-community for it in the schema.
6- Bedroom and Bathroom fields must be between 0 and 10 as specified in the schema.
7- Size must be between 100 and 1,000 as specified in the schema.
8- Budget (Price) must be between 10,000 and 100,000 as specified in the schema.
9- The lead's status must be Open to be involved in any schema.
10- The Lead's Stage must be New to enter any schema.
11- The "Send to rotation" field must be set to Yes.

Note 1.

All other fields can be set to anything, as it's not specified in the Schema and thus it will not affect the rotation process.

Note 2.

If the language of the schema was lifted empty when creating it, then the Leads will be Distributed if the contact's language (assigned to the lead) matches the agent's language (The referred bys agents), Which can be checked from the System Admin module → Users → Edit → Languages.



This Lead will be automatically assigned to Wessam RolesTest Agent since he has 0 agents assigned to it during the current month, and Wessam Lahloub Agent has 1 lead assigned to it.

We can check if the lead got assigned to the agent or not by checking the "Referred To" field after saving the lead, or from the Lead's Activities.

<< screenshot for the referred to and activity autorotation>>

6. Assign Agent's Tracking

We can also check all the rotation details by navigating to the "**Assign Agents Tracking**" where we can find all the agents that got the rotation, the date that the lead got assigned to a lead through the rotation, and the name of the rotation that the lead has entered.

<Needs screen shot after lead issue get fixed>