<u>Queue Enhancements in Microsoft Dynamics CRM 2015</u>

- Use queues to organize, prioritize, and monitor the progress of your work.
- In Microsoft Dynamics CRM, queues are containers to store anything that needs to be completed or requires an action. For example, completing a task or closing a case.

<u>Create queues</u>

1. By default, a queue is created for each user and team in Microsoft Dynamics CRM.
2. You can use this default queue to track all your work items, or you can set up queues to reflect your organization's structure, business processes, or both.
3. How you set up queues depends on your unique business needs.
4. For example, you could create separate queues for First Tier and Second Tier product support teams that reflect their differing levels of expertise, or Gold and Silver queues to reflect differing priorities based on service contracts that customers have with your organization.
5. Microsoft Dynamics CRM lets you create two types of queues.
6. Create private queues with limited set of members to let only those members view the items in the queue.
7. Create public queues to let everyone in the organization view the items in a queue.

<u>Route items to queues</u>

8. For all cases that are automatically created from incoming email and social posts, create routing rules to route the cases to queues.
9. Then assign the items in the queue to appropriate CSR or users. Alternately, you can manually add cases and activities to queues.

<u>Assign items in the queue to work</u>

10. Queues share cases or activities as a group until these are taken out of the queue, or accepted, by a customer service representative (CSR) who assumes responsibility for handling them.
11. CSRs can pick the items for themselves, or a customer service manager (CSM) can manually route these cases to the CSRs or to other queues, users, or teams.

<u>Important points:</u>

1. As you know for each user or team, a queue used to be created by default in the system. Now such queues will be converted to Private Queues.
2. When a private queue is created the Owner of the queue will automatically get added into the Queue members by default. To add more members click on the + sign on members grid and select the user.
3. You can also remove the Members from the Queues by clicking on the “Trash” icon on line items.
4. Members who are added in Private Queue will only be able to work on queue items of that Queue.

5. While creating Queue, if you select the “Team” as owner of the Queue then all the team Members of that team will get added to that Queue as members. Whereas on update/ assign the members grid remain unchanged.
6. BUT The “Administrator” of the Team will not get added into the Queue members.
7. To add all the team members of any other team under a private Queue members, click on the + button >> change the Entity lookup on dialog to Team >> select the Team. Then all the members from that team will get added in the members grid.
8. If any Team is Owner of private Queue with all its team members added in members’ grid of that Queue and suppose you modify the team to add any new member in that team then that newly added member will not get added under Queue members, they are not synced. If you are adding any new member/s in the Team then you need to make sure that you manually add those member/s to all the private queues where this team is Owner.
9. After creating the queue, if you assign that queue to another user, then that user (i.e. New Owner) will not get added in the Queue members. Whereas the existing user (former Owner) will remain in the Queue members and will not get removed automatically. Also you need to manually add new owner to the Queue members.