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Communication

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Settings

< Back to My Workflows

Cancel

Save

1. Setting up my Workflow

Workflow properties

Workflow name

Task Reservation timeout (in seconds)

e.g.: Support Team

e.g.: 100 seconds

2. Creating Filters

New filter 1

Create matching task

Syntax (Go to docs)

Attributes

Condition

Label

Language

HAS

English

and

Attributes

Condition

Label

e.g.: Language, Skill, Department

Select or type a condition

e.g.: English, Payment, Sales

and

+Add new task expression

Create routing steps

Matching Agents

Priority & Timeout

Queue

Priority

Select

e.g.: 10

Agent expression

Timeout (in seconds)

e.g.: Language HAS English-EN

e.g.: 100 seconds

Matching Agents

Priority & Timeout

Queue

Priority

Select

e.g.: 10

Agent expression

Timeout (in seconds)

e.g.: Language HAS English-EN

e.g.: 100 seconds

+Add a routing step

Smart Workflow Routing Made Simple

Streamlining the Routing process

Routing setup is usually complex, especially for lean teams. The new Workflow Builder makes it simple, letting users define filters, conditions, and steps in one place, no tech help needed.

With a clear UI and drag-and-fill logic, it's fast and flexible.

In testing, setup was 30% faster than competitors, and 87% of users completed it without support, citing clarity and ease as key benefits.

Failures

- **Setup lacked guidance, causing confusion especially for SMBs** with limited support resources.
- **Early users struggled to understand the primary value proposition of the product.** Without a clear “why” and “when to use,” many defaulted to existing workflows, resulting in low adoption.
- **Urgent calls and standard tickets were mixed** creating confusion during initial interactions.
- **Response suggestions lacked relevance and context**, offering minimal productivity gains for agents.

Takeaways

- **Start with core messaging channels** (e.g., WhatsApp, Messenger) to drive early value and adoption.
- Leave voice aside for the launch of MVP, it's too complex and hard to have that up running, less is more;
- Agents often juggle multiple conversations and channels. **The interface should allow fluid navigation between tasks without disorientation** or loss of progress, minimizing the cost of multitasking.
- **Focus on automation and productivity without add more complexity** on the user side (integrations with third parties);
- Decrease UI cognitive overload;
- **Optimize for search** and make it central to the experience;