Best Practices

For the best results with Flow, please follow these suggested guidelines.

You Should:

- Assign only the minimum permissions necessary for individuals to fulfill their role duties
- Plan Queues and Queue overflow before creating them in Flow.
- Test your Queues before putting them fully into production use - a Queue that is not configured properly can likely lead to a bad customer experience trying to contact the organization frustrating callers before they can reach you.
- Educate Supervisors to not directly modify Agent status unless necessary - status changes are tracked internally so skewing in favor of or against Agents can be detected.
- Clone existing Application reports and dashboards when making custom Applications or modifying existing ones.
- If Application reports are being sent to multiple individuals, request your IT department to create a mailing group including the relevant individuals so reports can be sent to a single “address”.
- Encourage agents to transfer calls using Click-to-Transfer instead of through a headset or from the handset directly.

You Should Avoid:

- Re-using Agent ID numbers.
- Deleting Agents, Queues, etc. - set them to inactive or disabled to retain historical data that may be used later in reporting.
- Recycling existing queues by renaming them or repurposing a disabled queue. If a new queue is needed it should be created.
- Setting Queues that overflow to do so into Queues that also overflow.
- Creating skills that are named or implicitly suggest proficiency such as “help desk trainee”. The proficiency associated with each skill accounts for this.
- Deleting Reporting Parameters starting with “nt-”.
- Transferring calls through a headset or from the handset directly.
- Manually managing Agent Current Status - let Post-Call Status do the work.

Related articles

- Supervisor Call Functions
- Call Logs
- Agent Login
- Toolbar Buttons
- Agent Status