Manual Assignment – Beta Instructions

# How to test: (note: recommend testing with email)

1. Ensure the appropriate permissions are assigned to the user updating the API

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Assign to Others** | **Assign to Self** | **View\* (existing)** |
| **Voice** | conversation:call:assign | conversation:call:pull | conversation:call:view |
| **Email** | conversation:email:assign | conversation:email:pull | conversation:email:view |
| **Chat** | conversation:webchat:assign | conversation:webchat:pull | conversation:webchat:view |
| **Messaging** | conversation:message:assign | conversation:message:pull | conversation:message:view |
| **Callback** | conversation:callback:assign | conversation:callback:pull | conversation:callback:view |

1. Select queue to test with
   1. Enable queue-level setting via API
      1. GET/api/v2/routing/queues/<queueID>
         1. Copy payload
      2. PUT/api/v2/routing/queues/<queueID> (use payload from the previous GET step)
         1. Insert a new row: ‘**"enableManualAssignment": true,**’ (recommend inserting into its own row after ‘skillEvaluationMethod’
            1. See sample payload below
2. Check queue settings to ensure evaluation method for you intend to test with is either ‘All Skills Matching’ or ‘Best Available Skills’
3. Log in an agent to the test queue
   1. Make sure agent have has no skills or proficiency
   2. Note AgentID for later
4. Send an email into the queue with and skill attached (skills are set in architect flow)
5. If setup correctly, the email should be sitting in queue in a ‘waiting’ state
6. To assign the interaction to the agent:
   1. Find conversation ID of waiting interaction
   2. Use new API: POST /api/v2/conversations/{conversationId}/assign
      1. Insert conversationID into API payload where requested
      2. Insert AgentID into body of payload
      3. Send the request
      4. If successful – you should receive a ‘202 Accepted’ response from the API and the agent should receive the alert notification to accept or decline the interaction.

# Phase 1 Limitations

1. Manual assignment will only work to agents in the same queue
2. Utilization will be honored – so once an agent’s utilization is full for a specific media, they will not be eligible to receive an assigned interaction.
   1. It’s very unlikely that when they do come available a supervisor would have enough time to manually assign an interaction as assignment would have already picked it up.
3. Manual assignment will ignore all skills, languages, priority, time-in-queue, bullseye ring number, or Preferred Agent Routing score
4. Agents must be on-queue and in an Idle, interacting, or communicating state
   1. ‘Not\_responding’ agents will not be eligible
5. Agents cannot be assigned an interaction if they are already in an alerting state for another interaction.
6. Agents must have the appropriate permissions to receive assigned media type.
7. Interactions that are declined or not answered by an agent (timeout threshold reached) will return to queue where they may be assigned again until successfully answered.

NOTE: If you update the queue settings after enabling manual assignment – you will need to re-enable the queue via the API before testing again.

# API Sample: Conversation > Assign > PUT

{

"id": "efcaa1f9-da08-4ed4-a297-99ebca52ede4",

"name": "ChrisBohlin",

"division": {

"id": "b825f73b-b96f-43fe-b9bc-f43c48d9d49b",

"name": "Home",

"selfUri": "/api/v2/authorization/divisions/b825f73b-b96f-43fe-b9bc-f43c48d9d49b"

},

"dateModified": "2020-07-14T19:02:58.741Z",

"modifiedBy": "0cbe4603-7a7d-4b7d-8fc9-e9799d309cf1",

"memberCount": 3,

"mediaSettings": {

"call": {

"alertingTimeoutSeconds": 8,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 20000

}

},

"socialExpression": {

"alertingTimeoutSeconds": 300,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 20000

}

},

"chat": {

"alertingTimeoutSeconds": 30,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 20000

}

},

"callback": {

"alertingTimeoutSeconds": 30,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 20000

}

},

"message": {

"alertingTimeoutSeconds": 30,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 20000

}

},

"videoComm": {

"alertingTimeoutSeconds": 8,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 20000

}

},

"email": {

"alertingTimeoutSeconds": 300,

"serviceLevel": {

"percentage": 0.8,

"durationMs": 86400000

}

}

},

"routingRules": [],

"acwSettings": {

"wrapupPrompt": "MANDATORY\_TIMEOUT",

"timeoutMs": 120000

},

"skillEvaluationMethod": "ALL",

"enableManualAssignment": true,

"autoAnswerOnly": true,

"callingPartyName": "",

"callingPartyNumber": "",

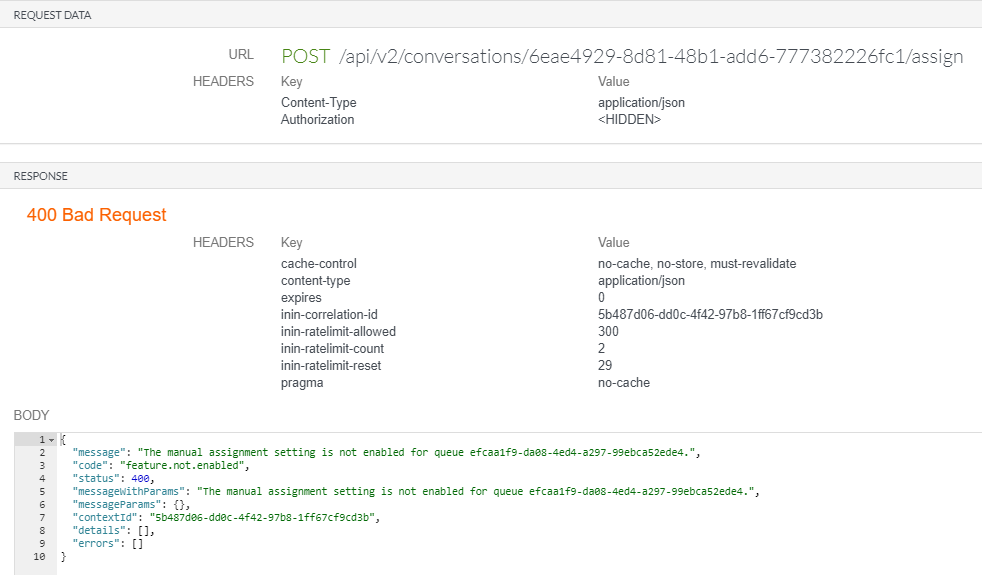
"defaultScripts": {},

"selfUri": "/api/v2/routing/queues/efcaa1f9-da08-4ed4-a297-99ebca52ede4"

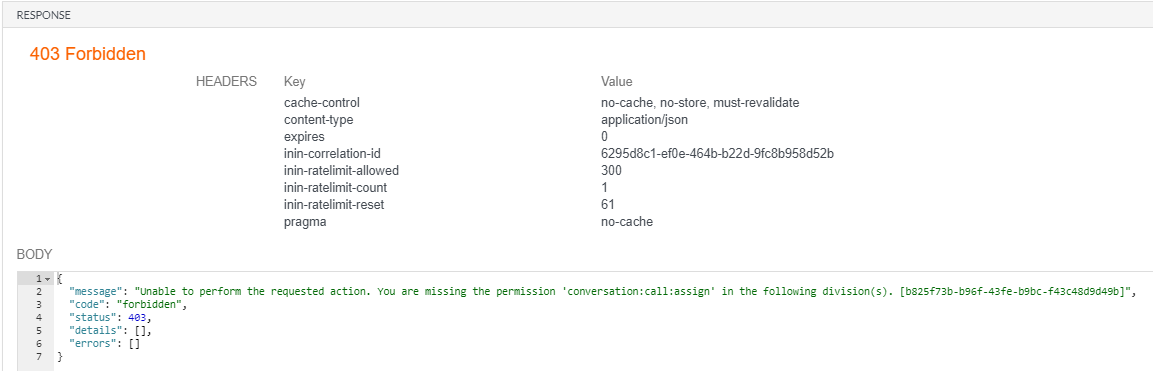
}

API Failure Errors:

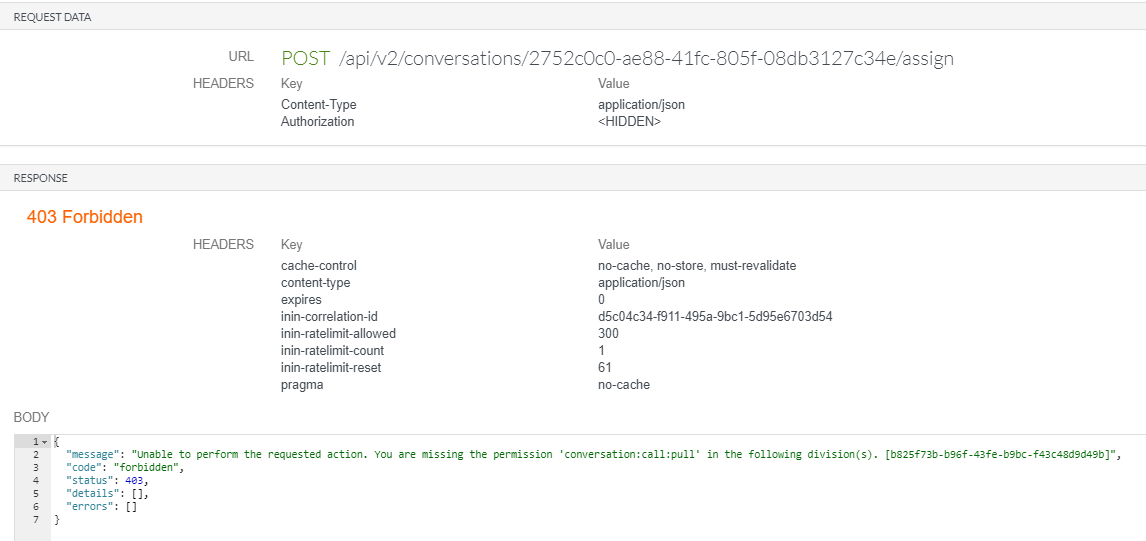
1. Queue not enabled for manual assignment



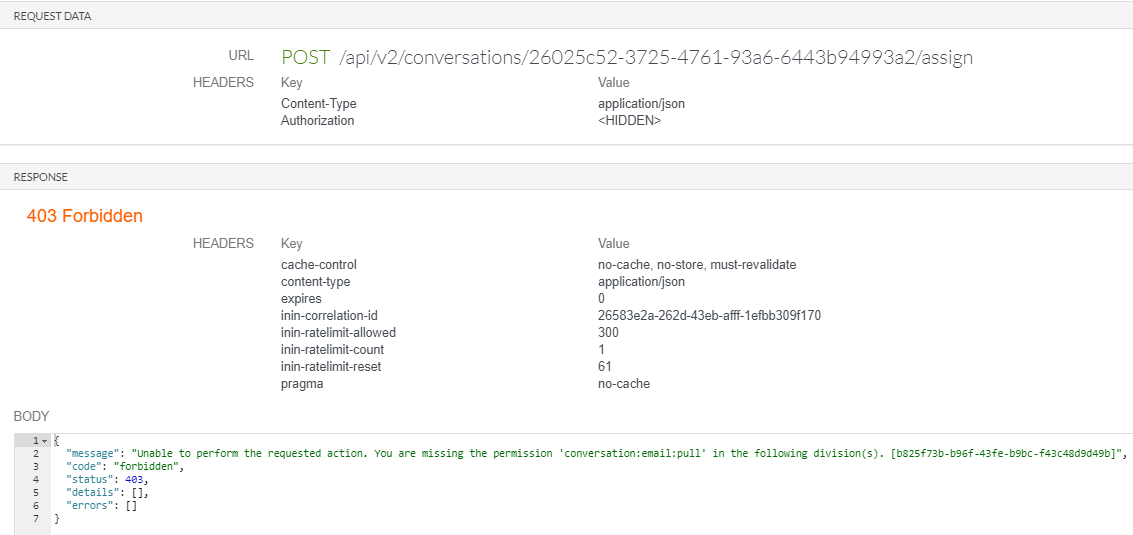
1. Missing ‘conversation>call>assign’ permission:



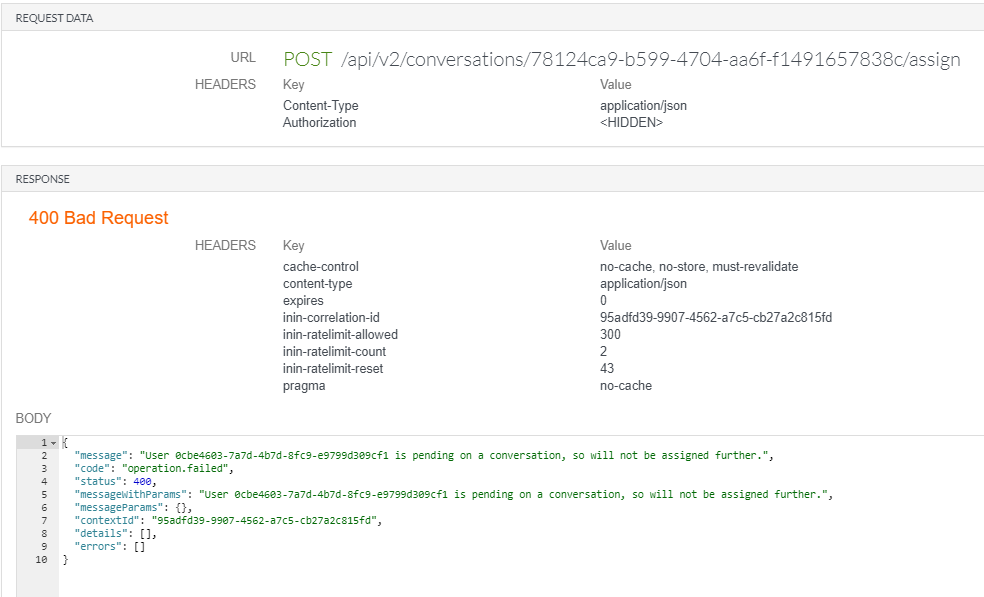
1. Missing ‘conversation>call>pull’ permission



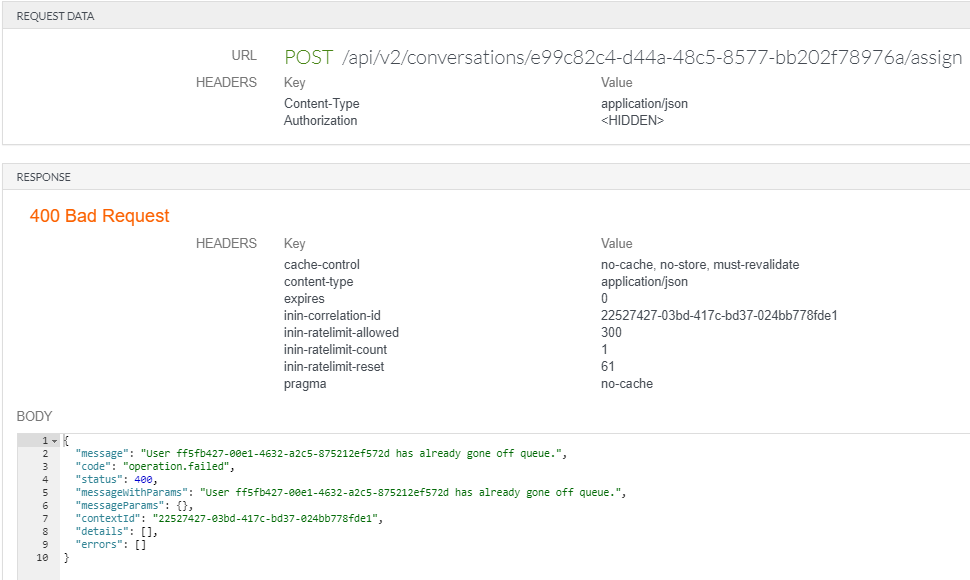
1. Missing ‘conversation>email>pull’ permission



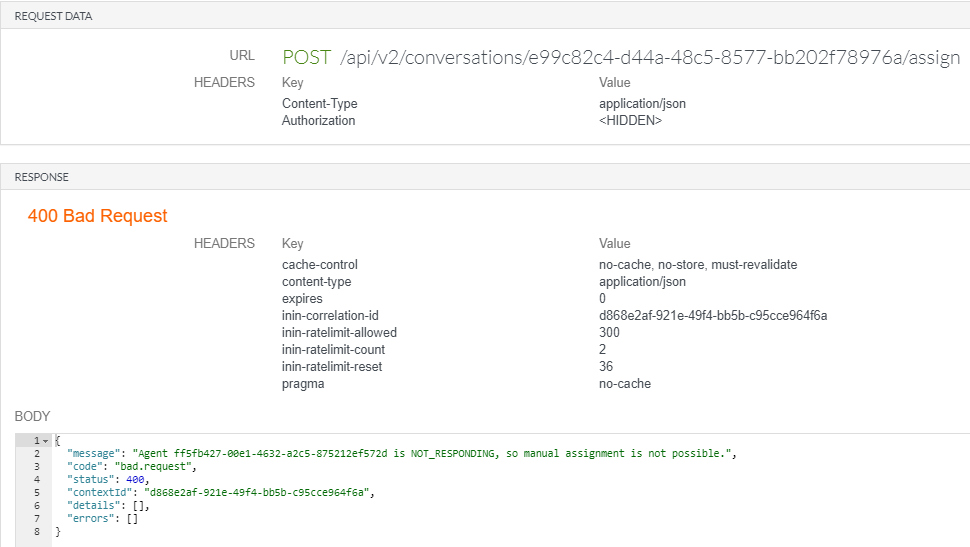
1. User already alerting



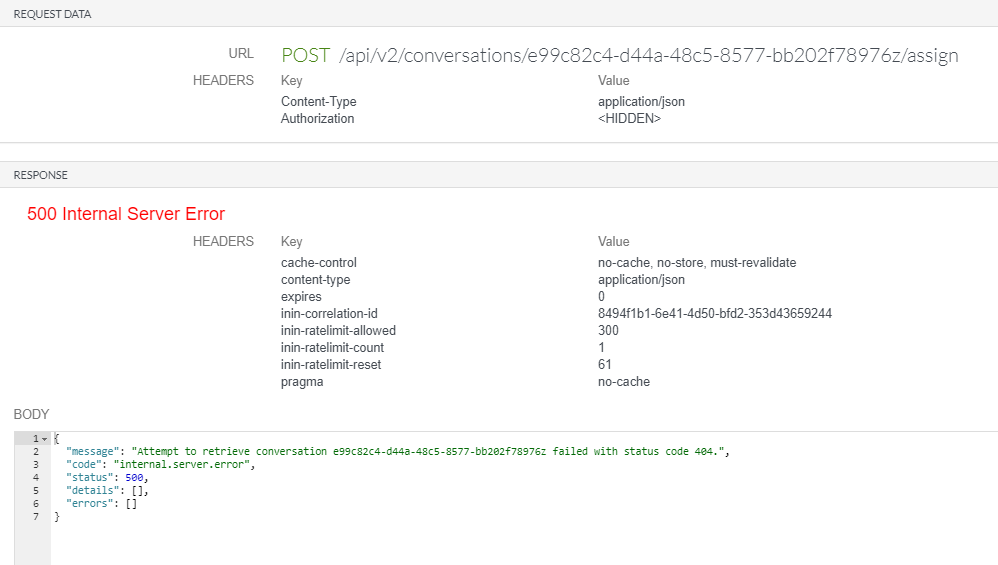
1. Agent off-queue



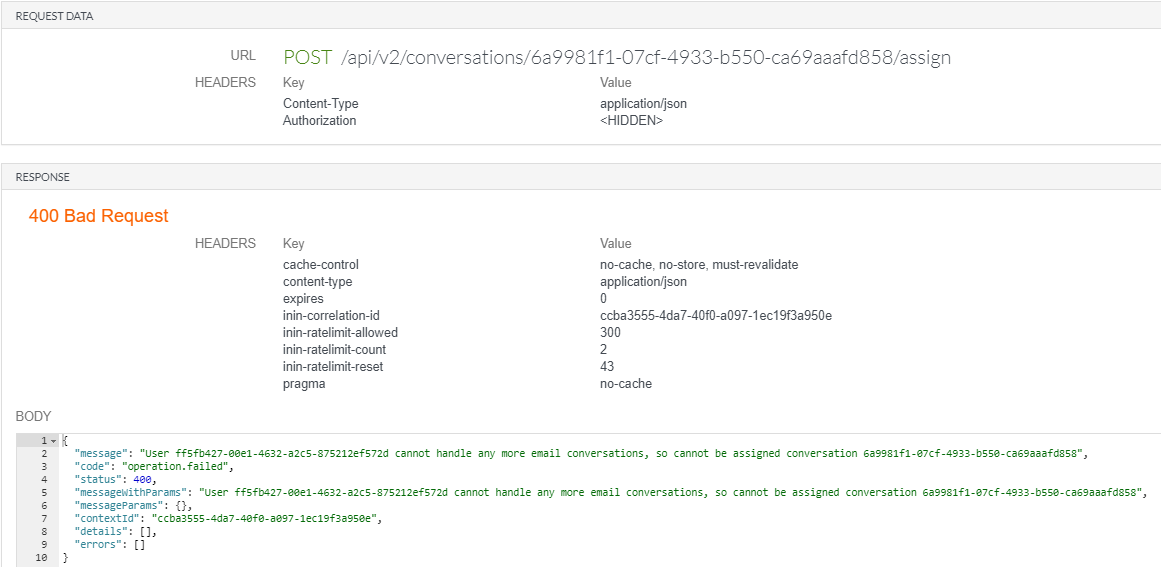
1. Agent ‘not-responding’



1. Bad conversationID:



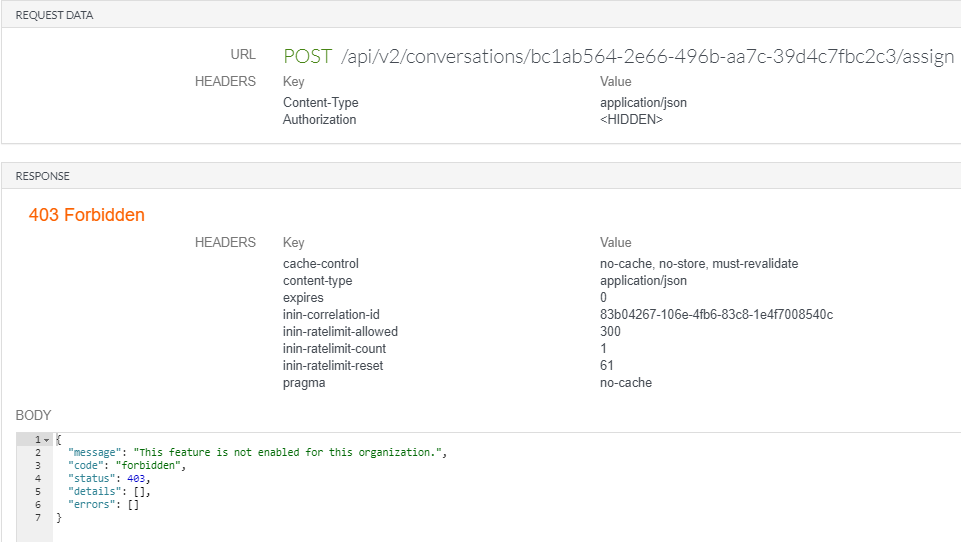
1. Agent fully utilized



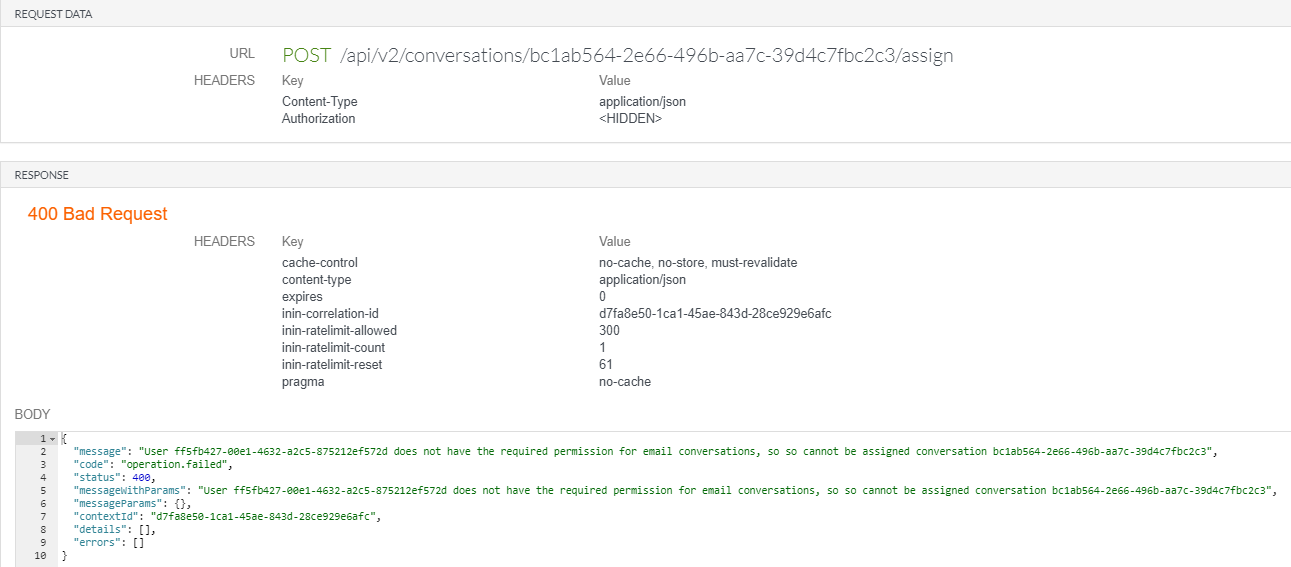
1. Agent not active on queue



1. Feature toggle not enabled on org:



1. User does not have permissions to accept



1. Interaction already alerting another agent

