



# Ticket Distribution Methods

Help Documentation

## Ticket Distribution Methods

There are two types of distribution methods available for tickets: "Pull From Queue" and "Round Robin". Ticket distribution is set up at the group level, when adding agents to a Group .

Administrators select how agents will participate in the round robin distribution method, whether they are part of the primary or secondary distribution group or not included in the automated distribution.

For more details on setting up the SmarterTrack distribution methods, refer to the KB article [Ticket and Live Chat Distribution Settings](#) .

### Pull from Queue

Also known as "cherry picking", this distribution method allows agents to pick and choose the tickets they want to work on. If all agents in a group are set to Not Included (Pull from Queue), all tickets are directed to the Queue and agents must manually take the tickets they are going to respond to. This model is typically preferred by smaller companies with lower volumes of tickets. This model can also be used by companies that want the absolute fastest response time and are not concerned that agents can see all available tickets. Because this relies on the agents to do their fair share (and not pick the easy tickets), proper agent training is essential for successful implementation of the cherry picking distribution method.

Administrators that choose this distribution method should note the following:

- When agents are added to a group, in order for them to cherry pick tickets, the agent's round robin option should be "Not Included (Pull from Queue)". This will add the agent to the group so that they can see tickets, take transfers and pull tickets from the group's queue; they just won't receive any new tickets automatically.
- New tickets are not assigned directly to agents. All tickets are directed to the Queue and are grabbed by staff members. (Waiting and follow-up tickets are assigned as usual, if the agent's are active in the proper ticket groups.)
- It's recommended that managers or system administrators configure event notifications that alert agents and/or managers when tickets have been waiting in the Queue too long.

### Round Robin

If administrators want to have more control over how tickets are distributed and to whom, using a round robin distribution method by enabling assignment groups is the answer. For example, a company that has a sales team that works on commission may employ the basic round robin distribution method to ensure that all sales agents receive the same number of potential leads. Another example is a technical support group that consists of both veteran agents as well as new or "in

training" agents. In this case, administrators would want to make sure the more senior agents receive more tickets than the newer agents. In this case, when the group is set up and the agents are added, the more senior agents receive a high "max tickets" setting and are put in the primary round robin group, whereas newer agents are given a lower ticket limit and are added to the secondary group. In that way, the senior agents get all new tickets first, with the newer agents acting as the overflow.

Administrators that choose this distribution method should note the following:

- In order for the round robin distribution method to be used, at least one agent needs to have an assignment group, either primary or secondary.
- An agent is considered in receipt of a new ticket in the following cases. In each case, the ticket is counted against any Max Ticket settings for the agent:
  - An active ticket is created as an incoming or outgoing ticket and assigned directly or indirectly to him.
  - A ticket is transferred from a different user to him, and it's active.
  - A new ticket is created through email or web services and is assigned to the agent.
  - An existing ticket is replied to through email and it is assigned to the agent but it was assigned to someone different before.
  - A ticket is created through web services and is set as active.
  - Whenever an agent goes active in the group, the agent pool is interpreted as having changed. This causes the allocated ticket counts to reset back to the count of open and active tickets for each agent. This prevents people that are on vacation from getting 20 tickets when their day starts, but still allows the system to deal with agents that come in a few minutes late.
  - When adding agents to a group, it IS possible to exclude specific agents from the round robin distribution. For example, managers may want to be part of a group but not receive any tickets. In this case, simply set the round robin distribution for the agent to "Not Included (Pull from Queue)" when the agent is added to the group, or edit the agent as needed.
  - It IS possible for agents in the secondary round robin group to be the first to receive tickets. This will occur if agents in the secondary group log in before agents in the primary group. For this reason, it's advisable that primary group agents log in first OR that agents in the secondary group have a managed ticket load using max ticket settings.

### **A Note on Round Robin, Agent Workload and Assignment Groups**

When adding agents to a group, it's possible to set the number of max new tickets that the agent can have open at any one time in addition to the assignment group that the agent belongs to. If you set Max Tickets for all agents, regardless of their assignment group, once the max tickets limit for all

agents is reached, any tickets that come into the group will go into the Queue and not distribute completely. The queue will only distribute as fast as the agents work. If it is important for the queue to be empty, you will want to avoid setting a Max Tickets limit for agents and NOT let them go inactive, again, regardless of their assignment group. Removing max ticket limits will provide the most balanced distribution across a 24 hour period. The Max Tickets setting represents how many NEW tickets are distributed and sitting in the agent's active list. That means that while follow-ups and waiting tickets that become active for an agent (e.g., a reply to a waiting ticket comes in) do not follow max ticket limit, they DO affect agents receiving new tickets. This is important because it allows new work to be evenly distributed but continues to let agents to manage their existing workload.

On the other hand, for new employees, agents-in-training or in circumstances where agents log out at the end of a shift or the end of the day, it may be worthwhile to add a max tickets limit while allowing all other agents in the group to grab the remaining workload.

## Rebalancing

The rebalancing method allows the system to automatically redistribute tickets to agents based on rules set by the administrator. For example, tickets can automatically be redistributed when a new agent logs in or at specific times of the day.

Administrators that choose this distribution method should note the following:

- When an agent views a ticket, it is temporarily assigned to that agent.
- If the agent begins to write a response to the ticket, the ticket is temporarily assigned to that agent. For more information, see the Rebalance Rules section of Tickets .