Round Robin on Active Agent With Load Balance

Auto-Assignment is the automatic assignment of tickets to agents upon creation of new tickets(when the ticket is created in the default status) or whenever an existing ticket gets unassigned back to the New/default status.

This feature is available for customers on Mighty, Fantastic and Enterprise pricing plans.

When the Active agent-based Auto Assignment enabled, the respective agents are assigned tickets in a serial manner based on their availability, load and throttle limit. Once all the active agents have been assigned tickets and the load is balanced, the next incoming ticket will be assigned to the first active agent again.

Here is how to enable this option in your help desk.

Auto-assignment setup

1. To setup auto assignment based on active agent, go to Manage >>Categories.

2. In the auto-assignment section under categories, click on add new auto

assignment.
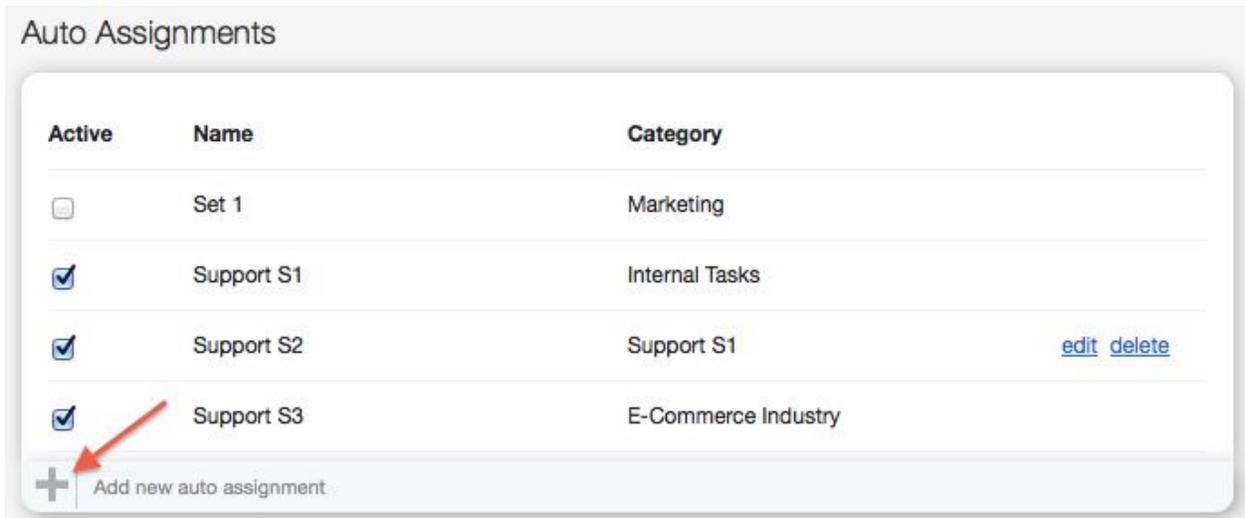
3. Provide a name for the auto-assignment and select the category for which you

wish to enable this assignment format.

4. Choose "Round Robin on Active Agent With Load Balance" under "Type".

5. In the Manage auto assignment section, select the agent for this format of auto assignment.

6. Choose the statuses which should be excluded when calculating the agent pending tickets load.

7. Click on Save Settings.

Category-Auto Assignment settings

Choose the agents who should be a part of the Auto Assignment for this category

Delete

Name

Billing

Category

Billing ▲▼

Active

Yes ▲▼

Type

Round Robin on Active Agents With Load Balance ▲▼

Associate Agents

☐ All   ☐ All Administrators   ☑ All Staffs

☐ Adams   ☑ Alex Rennie   ☑ John Doe

Throttle limit

Some of the agents in this category do not have a throttle limit specified yet. Choose a value here to set a throttle limit to all these agents.

Set throttle limit

10 ▲▼

Exclude statuses for load calculation

Auto assignment considers agent's current pending tickets load before assigning new tickets. Exclude the statuses which you don't want to consider while calculating the load.

☐ NEW   ☐ OPEN   ☑ ON HOLD

Save Settings   Reset   Cancel

7. Set the throttling limit of tickets to be assigned based on your requirement and click on save settings.
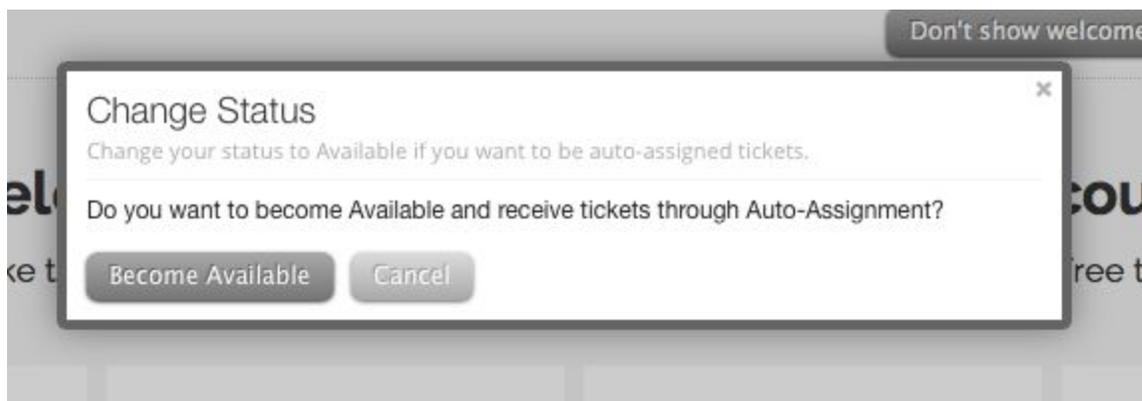
8. With these settings configured, the auto-assignment based on active agent is set.

Agent status setting

1. For an agent to be available, the agent has to log on to the agent portal and click on the "red dot" next to their name on the right top of the screen.
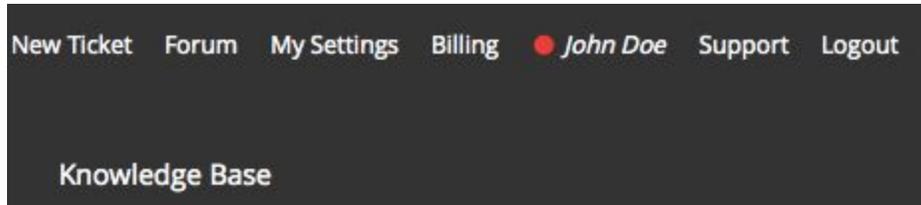
2. Once this is done, a pop up appears for confirmation.

3. If an agent logs in and forgets to enable this setting, the pop up will automatically appear in 5 minutes, and the agent can click on "become available" to start the auto assignment.

4. Once the agent confirms availability, the red dot will change to green indicating that the staff is now available.

5. To "become unavailable", the staff can click on the red dot and a pop up appears with options to retain all tickets that were assigned to the agent or leave them unassigned so that they can be assigned to the next active agent.

6. Upon logging out, their status will be automatically set to 'Unavailable'. If the agent does not logout or closes the browser/computer, their status will not be changed from Unavailable to Available.
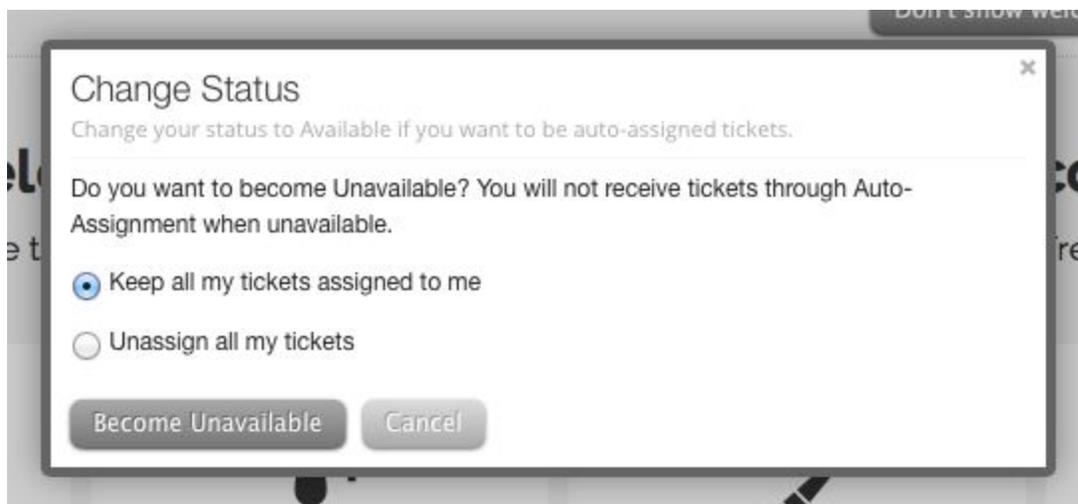
7. Clicking on "Become Unavailable", makes the agent inactive for auto assignment.

An administrator or an agent with access to the Manage >> Agents page, will be able to view a list of all active and inactive agents. The green dot indicates an active agents, red dot indicates an inactive agents, and the grey dot indicates a agent that has had their account deactivated.

Staff

Create new or edit existing staff members here.

Active	Name	Role	Email Address	
☑	🟢 **Alex Roldon**	Administrator	alex@example.com	
☑	🟢 **Ashley Barrett**	Administrator	ashley@example.com	
☑	🟢 **Jonathan Langan**	Administrator	jonathan@example.com	
☑	🟢 **Sandra Hanson**	Administrator	sandra@example.com	
☑	🟢 **Tina David**	Administrator	tina@example.com	edit
☑	🔴 **Bharath Karunamurthy**	Administrator	bharath@tenmiles.com	
☑	🔴 **Helen Jones**	Administrator	helen@example.com	
☑	🔴 **John Doe**	Administrator	john@example.com	
☑	🔴 **Joseph Christopher**	Administrator	joseph@example.com	
☑	🔴 **Rose Robertson**	Administrator	rose@example.com	
☑	🔴 **Stacy Hatley**	Administrator	stacy@example.com	
☐	⚫ **Nandhini**	Administrator	Nandhini.S@example.com	
☐	⚫ **Sam**	Administrator	bharath@example.com	

➕ Add new staff

Points to note:

ACTIVE STATUS

- Auto-Assignment based on Active agents will check which relevant agents are available at the time, and will distribute tickets to the available agents based on their current load.
- Agent load is calculated as a ratio of their current assigned pending tickets to their 'Throttle Limit'.

- If an agent has been given a throttle limit of 0 (which indicates 'unlimited'), the auto-assignment will calculate load as a ratio of their current pending tickets to the total number of pending tickets in its category.
- Auto-assignment in this routine always happens to the agent with the least load. *For instance*, if there are three agents A, B and C with a throttle limit each of 4, 6 and 10, and with current ticket counts as 2, 4 and 3, their loads will be 0.50, 0.67 and 0.33, and hence the auto-assignment will choose C since he/she happens to have the least load out of all three.

THROTTLE LIMIT

- Throttle Limit is the total number of tickets they can handle at the same time, and this is typically set for each individual agent by the admin/manager of the help desk.
- If an agent has been given a throttle limit of 0 (which indicates 'unlimited'), the auto-assignment will calculate load as a ratio of their current pending tickets to the total number of pending tickets in its category.
- If an agent hasn't been given a throttle limit at all(the field is blank), they will not be considered for auto-assignment based on active staff, but round-robin works as usual.