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Manage your Contact Center in Agent Setup

Capacity rules

Contents

- 1 Create a capacity rule
- 2 Select media channels
- 3 Define maximum number of interactions
- 4 Specify limits that depend on other channels
- 5 Edit a capacity rule
- 6 Assign a default capacity rule
- 7 Assign a capacity rule to an agent

Define an agent's ability to handle multiple interactions concurrently for different channels.

Related documentation:

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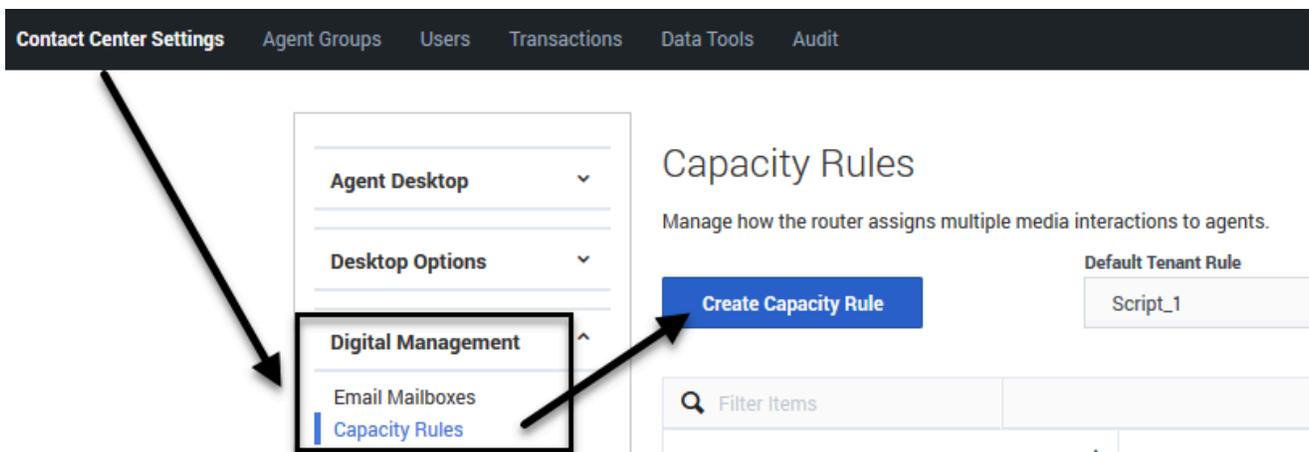
Capacity rules allow you to define an agent's ability to handle multiple interactions concurrently for different channels. When the limits for a channel are reached, the agent stops receiving interactions for that channel.

When you create a capacity rule, you define rules for every enabled channel, except for workbins and outbound channels. For each channel, you first need to set the maximum number of interactions an agent can handle, and then you can optionally define rules that also set limits for that channel based on the number of interactions being handled on other channels.

Example	Result
You could define the following for an agent using a chat channel: <ul style="list-style-type: none">• Allow a maximum of 3 chat interactions.	This rule means that the system will not route new chat interactions to an agent under the following conditions: <ul style="list-style-type: none">• If the agent is handling 3 or more chat interactions.
You could define the following for an agent using a chat channel: <ul style="list-style-type: none">• Allow a maximum of 3 chat interactions.• Do not send new chat interactions when the agent is busy with either:<ul style="list-style-type: none">• 1 email• 1 voice	This rule means that the system will not route new chat interactions to an agent under the following conditions: <ul style="list-style-type: none">• If the agent is handling 3 or more chat interactions.• If the agent is handling 1 or more email interactions.• If the agent is handling 1 or more voice calls.
You could define the following for an agent using a chat channel: <ul style="list-style-type: none">• Allow a maximum of 3 chat interactions.• Do not send new chat interactions when the agent is busy with either:<ul style="list-style-type: none">• 1 email and 1 chat concurrently• 1 voice	This rule means that the system will not route new chat interactions to an agent under the following conditions: <ul style="list-style-type: none">• If the agent is handling 3 or more chat interactions.• If the agent is already handling <i>at the same time</i> 1 or more email interactions <i>and</i> 1 or more chat interactions.• If the agent is handling 1 or more voice calls.

Example	Result
<div data-bbox="261 327 800 499" style="border-left: 2px solid orange; padding-left: 10px;"><p>Important</p><p>This is considered advanced functionality and is used in rare circumstances.</p></div>	

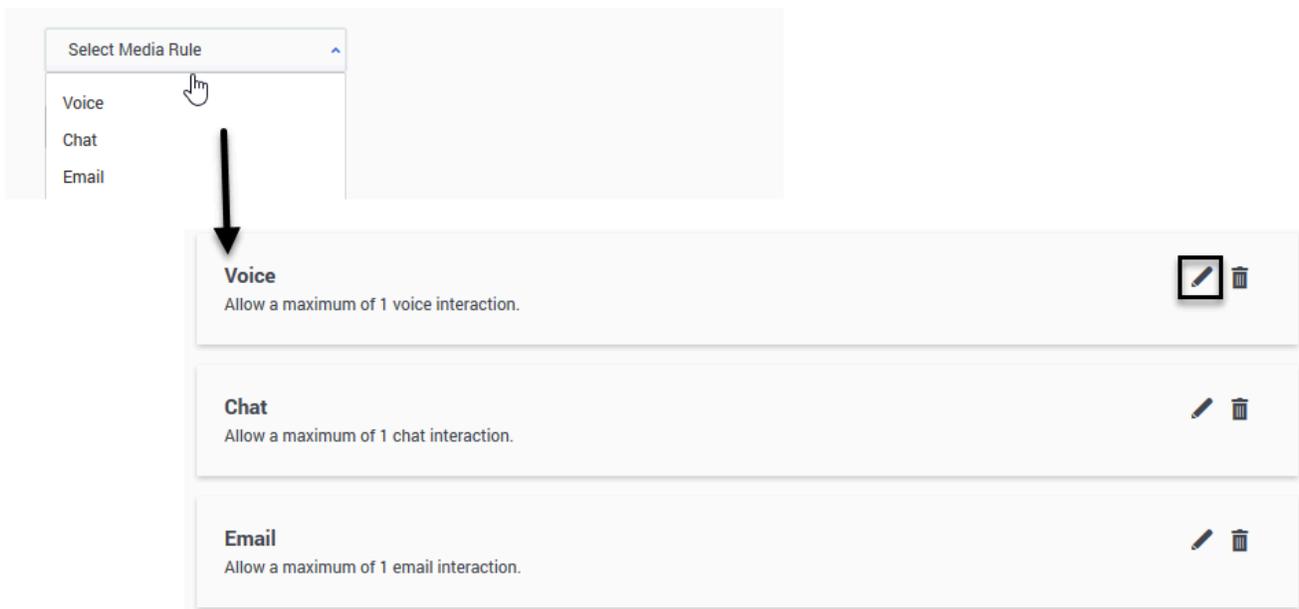
Create a capacity rule



To create a capacity rule:

1. Go to **Contact Center Settings** -> **Digital Management** -> **Capacity Rules** screen in Agent Setup.
2. Click **Create Capacity Rule**.

Select media channels



On the **Create a Capacity Rule** screen, enter a name for the capacity rule and specify the rule folder.

Next, from the **Select Media Rule** menu, select all channels that apply to your contact center.

When you select a channel, a default media rule for that channel appears onscreen. To open and edit the rule, click the pencil icon.

Now, you'll create the media rules by specifying the following:

- the maximum allowable interactions an agent can handle for a media channel.
- (optional) add limit conditions for that channel, based on interactions being handled on other channels.

Define maximum number of interactions



To define the maximum allowable number of interactions an agent can handle for a media channel, click the pencil icon to open and edit the media rule for the respective channel.

Next, in the **Allow a maximum of interactions** section, simply enter an integer in the text box to

define the maximum allowable number of agent can handle for that media channel.

You can click **Done** or continue on to define additional rules that depend on other channels.

Specify limits that depend on other channels

The screenshot shows a configuration window titled "Chat". At the top, it says "Allow a maximum of 3 chat interactions". Below this, there are two sections for dependency rules. The first section is titled "Also, don't send new chat interactions when agents are busy with, concurrently" and contains two rows: one for "Email" with a limit of 1, and one for "Chat" with a limit of 1. To the right of these rows is a button labeled "+ Add Concurrent Interactions". The second section is titled "Also, don't send new chat interactions when agents are busy with" and contains one row for "Voice" with a limit of 1, also with a "+ Add Concurrent Interactions" button to its right. At the bottom left, there is a button labeled "+ Add Rule On Other Channels". At the bottom right, there are two buttons: "Cancel" and "Done".

To specify rules that depend on the number of interactions of other channels being handled: Click **Add Rule on Other Channels**. Next, enter the number of interactions and select the channel that you want to depend on.

You can repeat and click **Add Rule on Other Channels** button to add more limit conditions on other channels.

Advanced, rarely used: Sometimes, you may need to define a more complex rule, that sets a limit based on interactions of several channels being handled at the same time by the agent. For that case, click **Add concurrent Interactions** to build composite rules.

To illustrate how this works, let's look at the last example from above:

Example	Instructions
<ul style="list-style-type: none"> • Allow a maximum of 3 chat interactions. • Also, don't send new chat interactions when the agent is busy with: <ul style="list-style-type: none"> • 1 email and 1 chat concurrently • 1 voice 	<p>To enable:</p> <ol style="list-style-type: none"> 1. Because the rule will contain chat, email, and voice interactions, you must have already selected all three channels from the Select Media Rule menu. That means you should see three separate sections on your screen - one for each channel. 2. Click the pencil icon in the chat section to define the chat media rules. 3. In the Allow a maximum of chat interactions field, enter 3 in the text box. 4. In the next section, for the Also, don't send new chat interactions when agents are busy with: option, specify an integer of 1 in the text box and then select Email from the Select Channel menu. 5. Click Add Concurrent interactions. 6. In the Also, don't send new chat interactions when agents are busy with, concurrently: section, specify an integer of 1 in the text box and then select Chat from the Select Channel menu. 7. Click Add Rule on Other Channels. 8. In the next section, for the Also, don't send new chat interactions when agents are busy with: option, specify an integer of 1 in the text box and then select Voice from the Select Channel menu.

Edit a capacity rule

To edit a capacity rule that has already been created, go to **Contact Center Settings -> Digital Management -> Capacity Rules** screen in Agent Setup. Locate the capacity rule from the menu and click the corresponding pencil icon. The Edit Capacity Rule window opens. Edit any or all of its properties.

Assign a default capacity rule

When you create a new capacity rule, it appears in the **Default Tenant Rule** menu on the main **Contact Center Settings -> Digital Management -> Capacity Rules** screen. Select any Capacity Rule from this menu to make it the default Capacity Rule for a tenant.

Assign a capacity rule to an agent

You can assign a capacity rule to a user in Agent Setup, as follows:

1. From the Users tab, locate the user/agent or add a new one.
2. From the Capacity Rules menu, find the capacity rule you want to apply.

You can also assign a capacity rule to a user in a CSV or XLS file that will be imported via Bulk Import:

- For CSV files - In the CapacityRule column, enter the capacity rule name.
- For XLS files - In the CapacityRule column, specify the capacity rule DBID.