

Everything You Need to Know About Creating a Task Flow

Types of Task Flows

1. Service Catalog/Smart Tickets: gathers specific information for an issue from the end-user and routes to the appropriate team
2. Troubleshooting and Triage: guides end-users through troubleshooting steps and if issue is not resolved routes to the appropriate team
3. Automation Tasks: the bot gathers the information required for a task and then completes it with the use of APIs

Why Consider Creating a Task

Tasks can result in a bot creating tickets that have:

- Pertinent issue details
- Appropriate categorization
- Route to appropriate queue along with a copy of the chat transcript.

This saves time for agents because there is:

1. No need to create a ticket
2. No need to gather information for initial triage
3. No need to touch tickets at L1 for those that require only routing to L2 or L3

Choosing a Task Flow to Create

An ideal task flow:

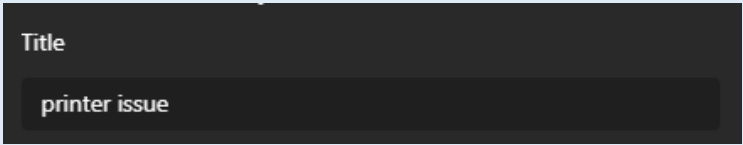
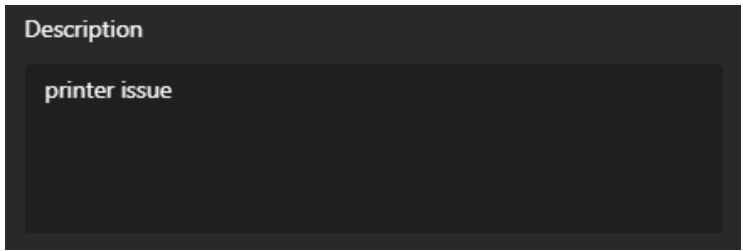
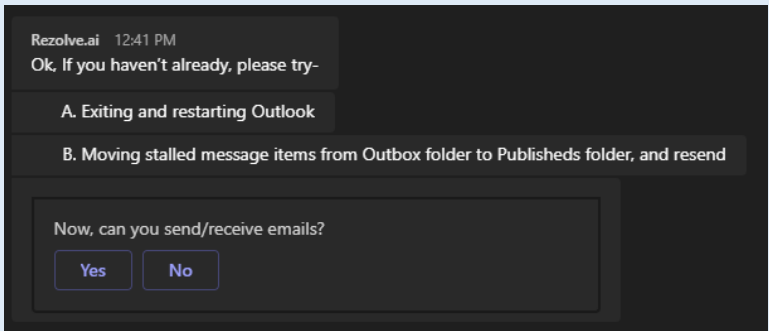
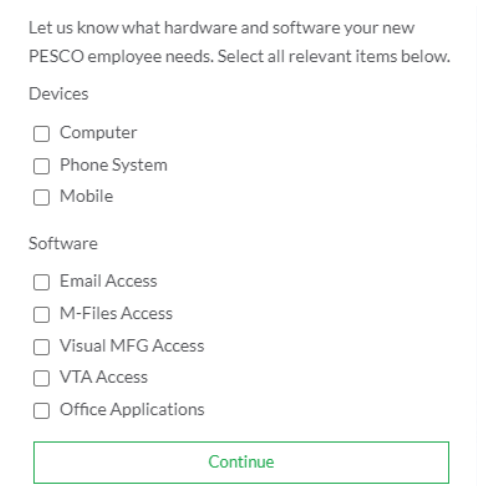
- Is a high volume driver
- Will make a complex process simpler for the end user
- Will save agent/analyst time and effort

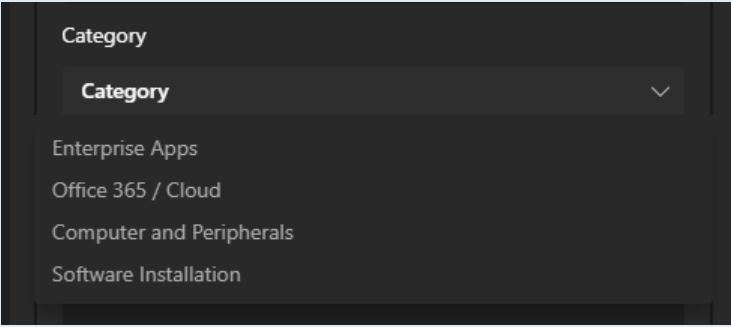
Creating a Task Flow Process

- Step 1** Build a decision tree to outlining:
- What details would you like the bot to communicate?
 - What information would you like the bot to collect?
 - How should the bot behave to user's responses?
 - What do you want to happen after the user has completed the flow?
- Step 2** Provide your decision tree to REZOLVE.AI to review.
- Step 3** REZOLVE.AI will set up a meeting if there are any questions or suggestions on changing the task flow.
- Step 4** REZOLVE.AI team will build the task flow in Staging environment.
- Step 5** REZOLVE.AI will have a meeting with you to review the task flow in the bot.
- Step 6** You review and provide feedback. If any changes are needed REZOLVE.AI will make them and give back to you for review.
- Step 7** Once you are happy with the task flow and approve it for production, the REZOLVE.AI team will push to PROD.

Response Field options

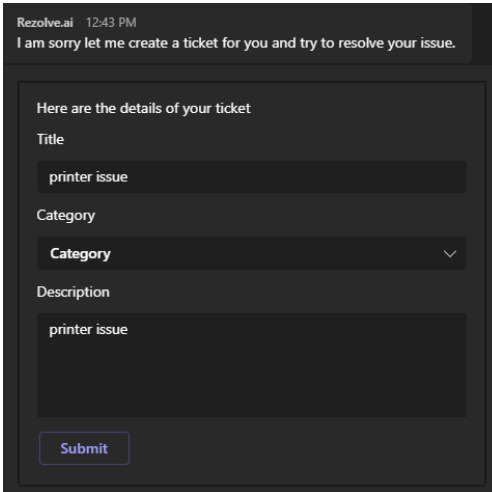
When gathering data from the end user the following response fields are available:

Type	How to indicate on your decision tree	
Single line Textbox	Question {textbox}	
Multiline Textbox	Question {multiline textbox}	
Buttons	Question <btn> Option 1 <btn> <btn> Option 2 <btn>	
Checkbox	Question [Checkbox] Option 1 [Checkbox] Option 2 [Checkbox] Option 3 Note: Multiple selection is possible	

<p>Dropdown</p>	<p>Question</p> <p><dropdown> item1, item 2, item3</p> <p>Note: Multiple selection is possible</p>	
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NOTE: The bot can display multiple fields in one prompt or sequential.

Multiple



Resolve.ai 12:43 PM
 I am sorry let me create a ticket for you and try to resolve your issue.

Here are the details of your ticket

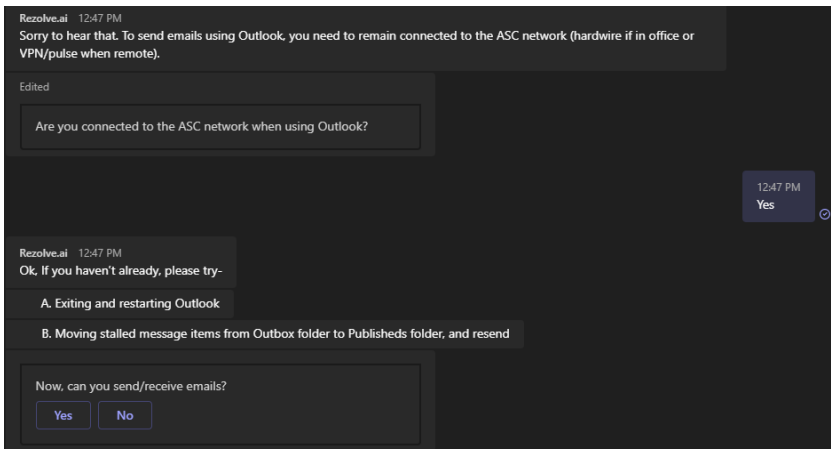
Title

Category

Description

or

Single



Resolve.ai 12:47 PM
 Sorry to hear that. To send emails using Outlook, you need to remain connected to the ASC network (hardwire if in office or VPN/pulse when remote).

Edited

Are you connected to the ASC network when using Outlook?

12:47 PM
 Yes

Resolve.ai 12:47 PM
 Ok. If you haven't already, please try-

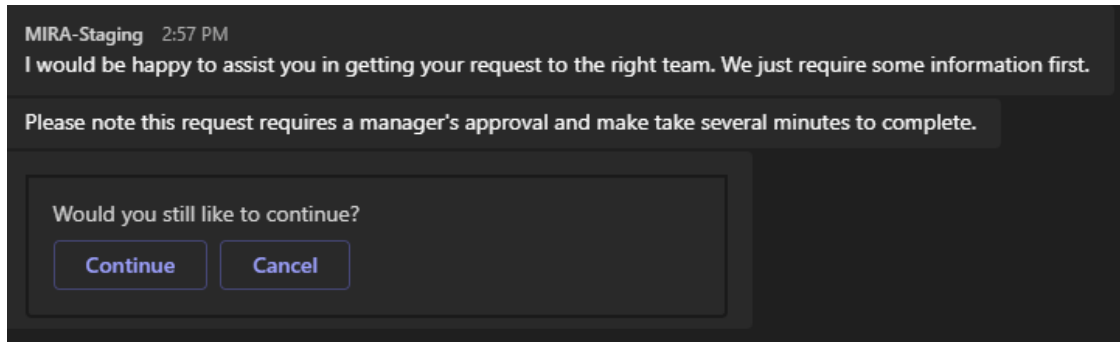
A. Exiting and restarting Outlook

B. Moving stalled message items from Outbox folder to Published folder, and resend

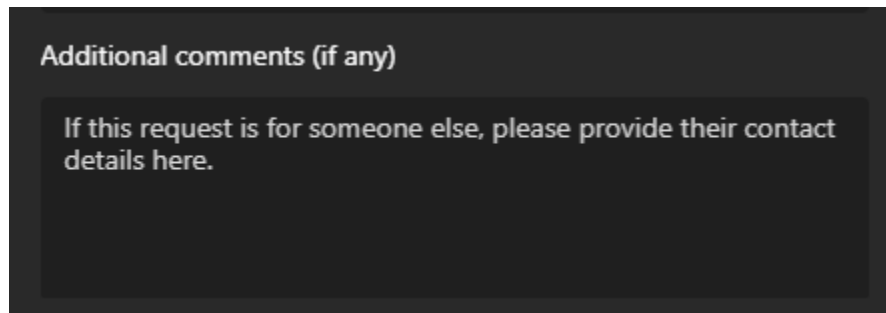
Now, can you send/receive emails?

Best Practices

- Set user's expectations at the beginning of a flow
 - Give them an idea on how long the task will take
 - Notify them that approval is needed



- When collecting information
 - Don't put more than 4-5 response fields on the screen at the same time
 - If giving the end user more than 3-4 options – make response field a dropdown
 - When listing items and there is potential you didn't cover all the options include "Other" in list
 - Give the end-users an exit option in case they are unable to continue
 - Give the end-user an "Additional Comment" field, to get any additional details



- After collecting required information
 - Allow end users the opportunity to review what information they provided and Modify/Submit or Cancel

Please review and confirm the details of your request and click 'Submit':

Request for :	Kerrie-Ann Cameron
Software requested:	something
Business Justification:	sfasdf
Regional Operations	asds
Manager:	

- Don't forget to define what you want the bot to do with the info gathered (i.e. Create a ticket, Send an email, Request approval, preform task etc)
- Inform the end-user on what the bot has done and what are the next steps if any i.e. I have created ticket ###. Someone from the IT Helpdesk will be contacting you shortly.