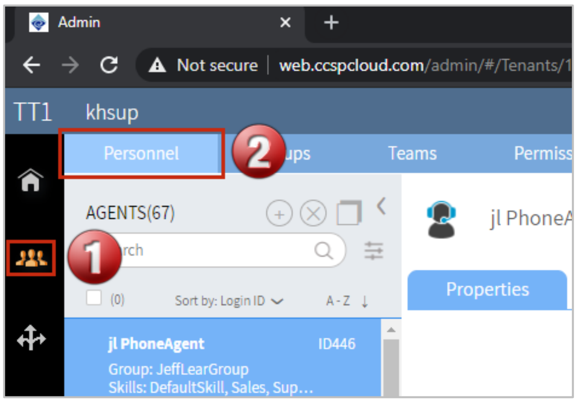
Manage Agents

Quick Reference Card

Introduction to agent management

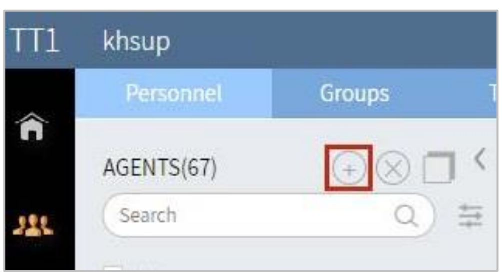
You use Admin to add, edit, and remove agents.

On the navigation pane, click **Organization** (1). On the menu, click **Personnel** (2).



Add an agent

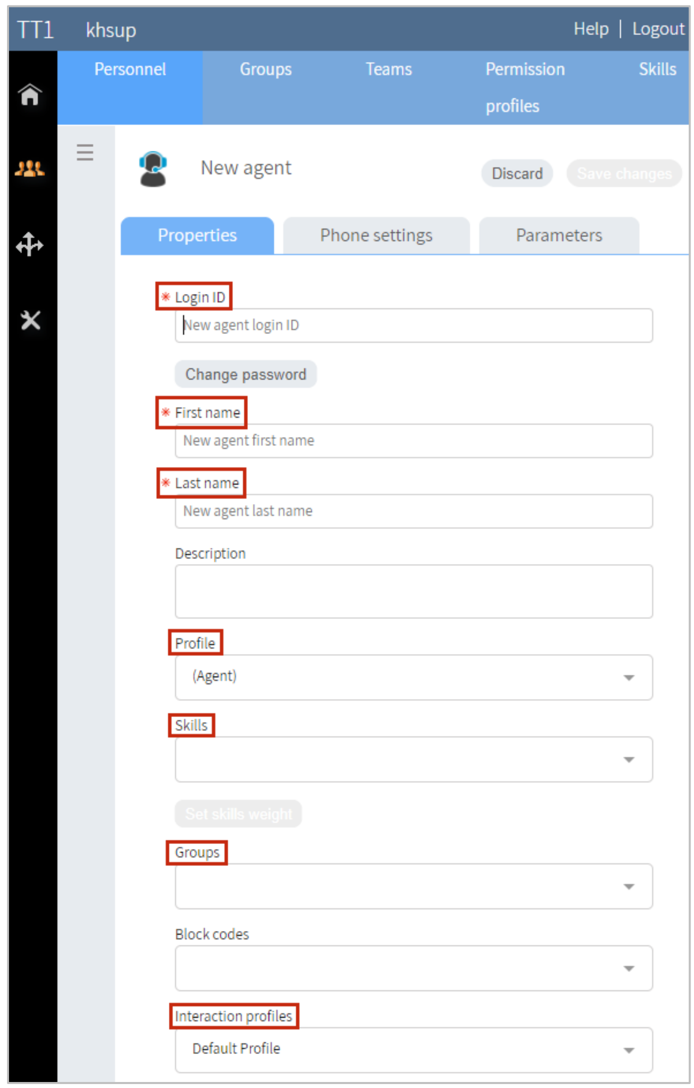
To create a new agent, click the **Add** (+) button.



Properties

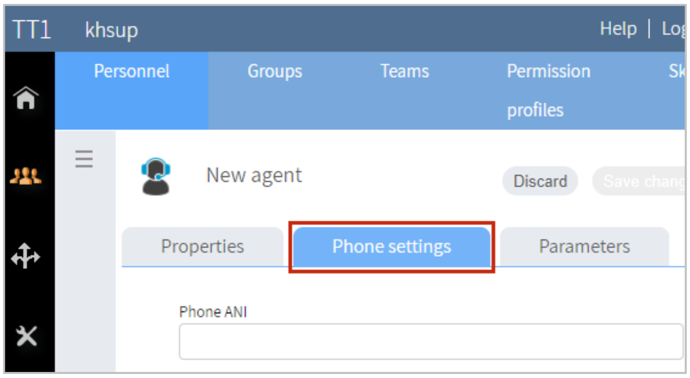
On the **Properties** tab, enter the following required information.

Login ID	An alphanumeric with no spaces that is unique to each agent.
First name and **Last name**	The agent's first and last name
Profile	The appropriate profile for the new agent
Skills	The interaction types to send this agent
Groups	The collection of agents and queues that facilitate interaction delivery
Interaction profiles	The types of media this agent can handle

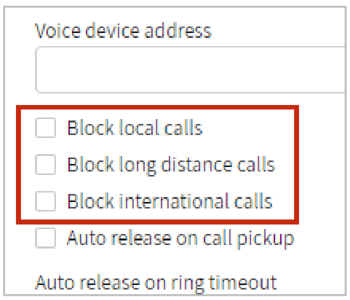


Phone settings

On the **Phone settings** tab, you can set things like the agent's caller ID.

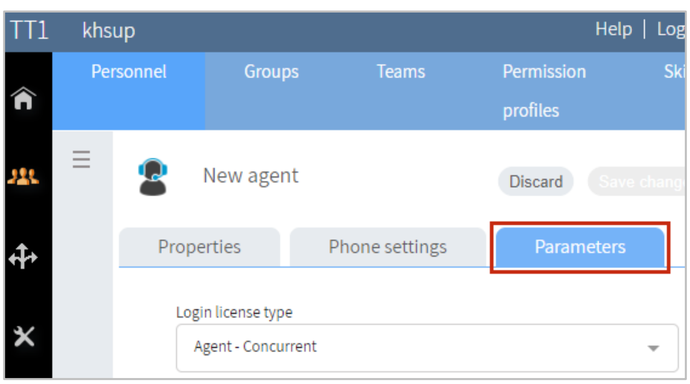


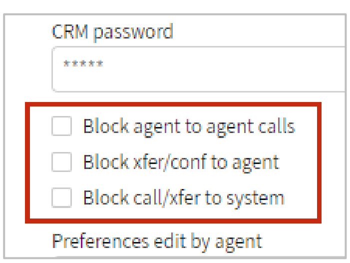
Although you can select to block calls on this tab, from an administrative standpoint it is best to set these at the group level, as show in the *Teams and Groups QRC*.



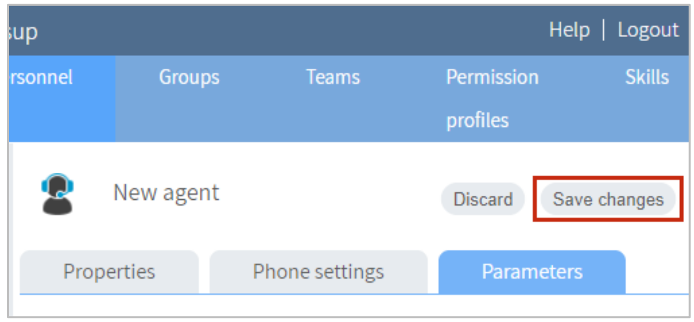
Parameters

On the **Parameters** tab, you can choose to block agent to agent calls, transfer or conference to agent, and call or transfer to system.





When the required fields are populated and the settings are configured according to the agent's requirements, click **Save changes**.

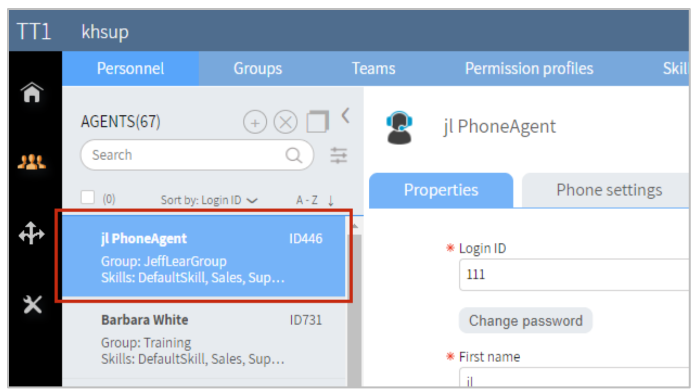


Edit an agent

Caution

Before editing the skills or group of an agent, consult with your system administrator as changing them could result in incorrect or no delivery of interactions.

To edit an agent that is already in your system, click on the agent. This populates the fields of that agent, where you can make changes.



Remove an agent

To remove an agent, select the check box next to the agent's name (1) and then click the **Delete** (X) button (2).