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Manage your Contact Center in Agent Setup

Agent groups

7/3/2025

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- Administrator

Organize your agents into groups so they're easier to manage.

Related documentation:

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Prerequisites

Before you can configure Agent Groups:

- You need to configure skills that will assign to the Agent Groups. If you haven't done so already, go to the skills tab and set up the skills you want to use.
- If you plan on creating Agent Groups by selecting specific agent accounts to the group, you first need to add the agent accounts. If you want to set up Virtual Agent Groups, it is not necessary to add the agent accounts first.

Configuring Agent Groups

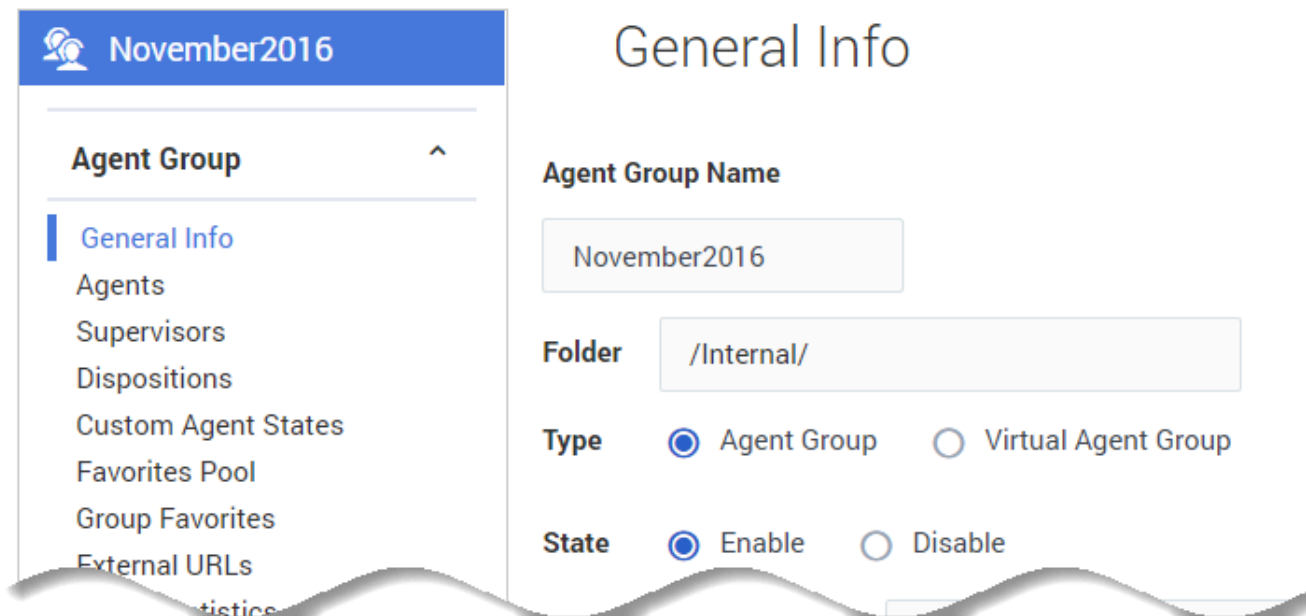
You have two options for creating Agent Groups:

- Create an **Agent Group** and then manually add agents to the group. For example, if you want to create an Agent Group for a group of new hires, you create the Agent Group, and then manually add each of the new hire's agent accounts to the group.
- Create a **Virtual Agent Group** to automatically group agents, according to their skills. You create an Agent Group object and define a script to identify the skills that you want the agents in the group to share. For example, you can create a virtual Agent Group for all agents that can speak Russian.

Both types of Agent Groups are configurable on the **Agent Groups** page. Use the following procedures to create and configure your Agent Groups:


Creating an Agent Group

New Agent Group



The screenshot shows the 'New Agent Group' window. On the left is a sidebar with a blue header containing a person icon and the text 'November2016'. Below the header is a list of options: 'Agent Group' (selected), 'General Info', 'Agents', 'Supervisors', 'Dispositions', 'Custom Agent States', 'Favorites Pool', 'Group Favorites', and 'External URLs'. The main area is titled 'General Info' and contains the following fields: 'Agent Group Name' with a text box containing 'November2016', 'Folder' with a text box containing '/Internal/', 'Type' with two radio buttons ('Agent Group' is selected, 'Virtual Agent Group' is unselected), and 'State' with two radio buttons ('Enable' is selected, 'Disable' is unselected).

In the **New Agent Group** window, type the name you want to assign to the Agent Group and click **Save**. In our example, the new Agent Group is a group of new hires, so let's name the Agent Group November2016 New Agents.

You can put the new Agent Group into a folder. This is useful for organizing your Agent Groups to make them easy to locate in the future. For example, you can place our new group into the **Training Groups** folder. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder  icon to create a new folder.

By default the **State** of a new Agent Group is automatically enabled. By clicking **Disable** you can disable any Agent Group.

Adding agents to an Agent Group

The screenshot displays the 'Agent Groups' interface for the group 'GSYS_SAT_FS_AG'. On the left, a sidebar menu shows the 'Agents' tab selected, indicated by a red circle with the number 1. The main area is divided into two columns: 'All Agents' and 'Agent Groups Agent'. In the 'All Agents' column, a red box with the number 2 highlights the 'Add' button. Below it, a list of agents is shown, including '(Cprs.100000)', '(Cprs.100001)', 'Agent_ChatHealthTest_0091 (Agent_ChatHealthTest_0091)', '123 (123)', 'AgentSetup2101 AgentSetup2101 (AgentSetup2101)', 'Christine Song (chsong_genesys@t0091)', and 'admins (admins)'. A red circle with the number 3 highlights the checkbox next to the 'admins (admins)' agent. In the 'Agent Groups Agent' column, a dashed box contains the text 'Drag and drop agents here', and below it, several agent names are listed, including 'polnikov_Agent_1@t0091 polnikov_Agent_1@t0091 (polnikov_Agen...)', 'SAT_Agent_1 SAT_Agent_1 (SAT_Agent_1@t0091)', 'SAT_Agent_2 SAT_Agent_2 (SAT_Agent_2@t0091)', and 'YP_webrtc_Agent_1@t0091 YP_webrtc_Agent_1@t0091 (YP_webrtc...)'.

When you create an Agent Group, you can go to the Agents tab and add agents to the group.

You can either drag the agent over to the Agent Groups Agent column, or you can click the box next to the agent's name in the All Agents list and then click Add. This automatically drops the agent into the Agent Groups Agent list.

Tip

On your Agent Groups list, you might see Agent Groups that have an **Add script** link in the script column. If you see this, it means that you or someone else created an Agent Group and no agents have been assigned to it. In other words, it's an empty group. You have the option to edit the group to manually add agents or click **Add script** to create a virtual Agent Group.

You can assign a designated supervisor for an agent group. A supervisor monitors the performance of the agents in the agent group. Use the **Agent Group Supervisor** page to select a supervisor. Tasks varies for the supervisor to manage and support the agent group depending on the role assigned. See Supervisor options for the various supervisor options.

Adding Supervisor to an Agent Group

Use the following procedure to assign a Supervisor for an Agent Group:

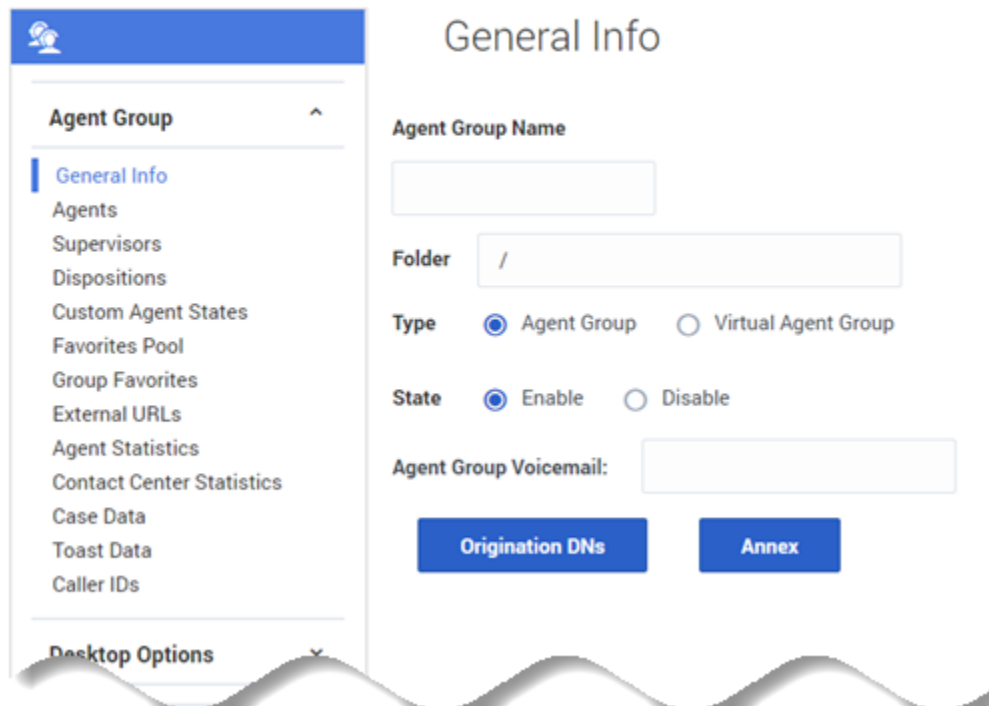
1. Go to the **Supervisors** section in the **Agent Group** tab.
2. Click the check box next to the supervisor's name in the **All Supervisors** list and then click **Add**. This automatically drops the supervisor into the **Agent Groups Supervisor** list.

Edit Agent Group

The screenshot displays the 'CXContactSMSGroup' interface. On the left, a sidebar menu under 'Agent Group' includes options like 'General Info', 'Agents', 'Supervisors' (highlighted with a red box and a red circle with the number 1), 'Dispositions', 'Custom Agent States', 'Favorites Pool', 'Group Favorites', 'External URLs', 'Agent Statistics', 'Contact Center Statistics', 'Case Data', 'Toast Data', and 'Caller IDs'. The main area is titled 'Agent Group Supervisor'. It features two panels: 'All Supervisors' and 'Agent Group Supervisor'. The 'All Supervisors' panel contains a search bar, an 'Add' button (highlighted with a red box and a red circle with the number 3), and a list of supervisors. The list includes 'Agent_ChatHealthTest_0091 (Agent_ChatHealthTest_0091)', 'gws_ixn_healthcheck_agent (gws_ixn_healthcheck_agent)', 'ixn_healthcheck_agent (ixn_healthcheck_agent)' (which has a checked checkbox, highlighted with a red box and a red circle with the number 2), and 'wfo_admin wfo_admin (wfo_admin@t0091)'. The 'Agent Group Supervisor' panel on the right has a search bar, a dashed box with the text 'Drag and drop supervisors here', and a 'No Items Found' message. At the bottom right of the 'All Supervisors' list, there is a pagination indicator '1-4 of 4' with left and right arrow icons.

Creating a virtual Agent Group

New Agent Group



The screenshot shows the 'General Info' form for creating a new Agent Group. On the left is a sidebar with a menu under 'Agent Group' containing: General Info (selected), Agents, Supervisors, Dispositions, Custom Agent States, Favorites Pool, Group Favorites, External URLs, Agent Statistics, Contact Center Statistics, Case Data, Toast Data, and Caller IDs. Below this is a 'Desktop Options' section. The main form area has the title 'General Info' and the following fields and options:

- Agent Group Name:** A text input field.
- Folder:** A text input field containing the character '/'. Below it is a label 'Folder'.
- Type:** Two radio buttons: 'Agent Group' (selected) and 'Virtual Agent Group'.
- State:** Two radio buttons: 'Enable' (selected) and 'Disable'.
- Agent Group Voicemail:** A text input field.
- At the bottom are two blue buttons: 'Origination DNs' and 'Annex'.

You can create a virtual Agent Group by specifying a script when you add an Agent Group.

As opposed to a regular Agent Group, you can't manually add agents to a virtual Agent Group. Agents are automatically included in the group if the agent is assigned the skill that is specified in the script.

After you add the script, you will see a link in the **Script** column on the **Agent Groups** page. The script identifies the common skills shared by all agents that belong to the group. You can edit the script by double-clicking the script text and then updating the script in the dialog box that is displayed.

Viewing an agent's Agent Groups

The screenshot shows the 'Users' tab in the Agent Setup application. A table lists agents, with 'Aiko Otsubo' highlighted. To the right, a sidebar displays details for this agent. The 'Agent Groups' section in the sidebar is circled, showing a search field and a list of groups: MMH_JA_Surface_DispositionList, MMH_Japan_Consumer_AgentDesktop, and MMH_OKW_LiveMonitoring_AG. Below the table, pagination shows '1 - 15 of 64352' and '15 per page'. The sidebar also shows 'Roles' (State Enabled, Multimedia Agent, Supervisor) and 'Phone settings' (Wrap Up Time, AgentVoice Mail).

Name	Username	Roles	Skills
Aiko Otsubo	[redacted]	Agent	5 Skills

Aiko Otsubo
Agent

Username
[redacted]

E-mail
[redacted]

Roles
State Enabled: true
Multimedia Agent: false
Supervisor: false

Agent Groups
Q Group Name
MMH_JA_Surface_DispositionList
MMH_Japan_Consumer_AgentDesktop
MMH_OKW_LiveMonitoring_AG
1 more...

Phone settings
Wrap Up Time (sec): 15
AgentVoice Mail

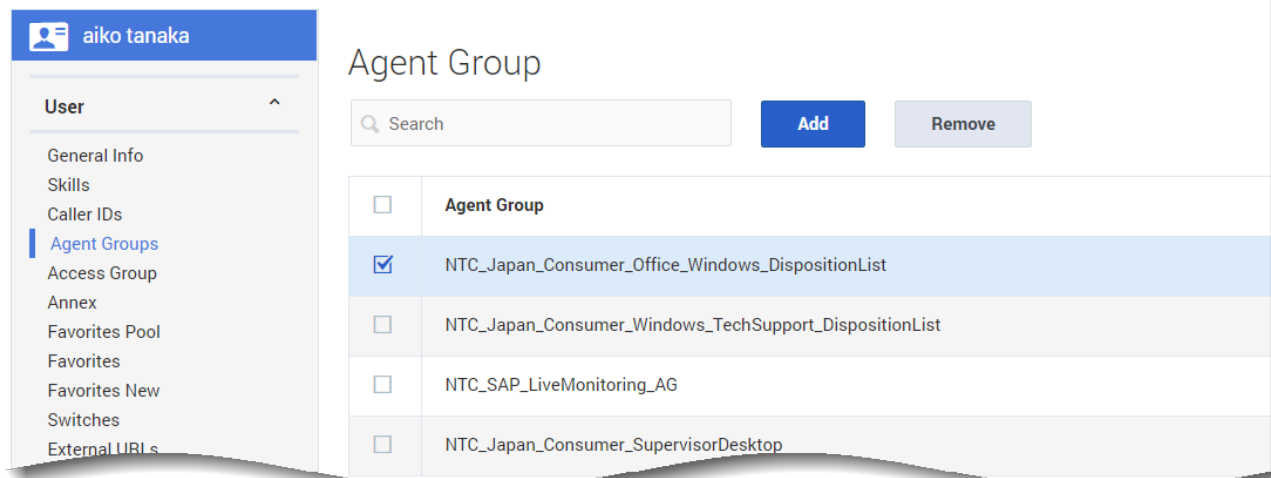
Caller ID Settings
Anonymous Caller: No

Edit User

To view which agent groups an agent belongs to, from the **Users** tab, click either the agent's **Username**, **Roles**, or **Skills**. From the sidebar which opens on the right of the screen, scroll to the **Agent Groups** section. Here you can either expand the list to view all the agent's groups, or you can use the search field to search for a specific group name.

Editing an agent's Agent Groups

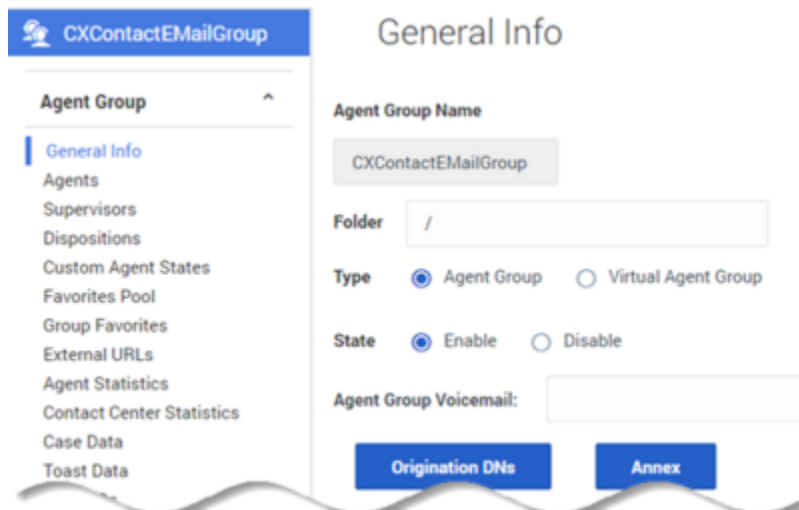
Edit User



To remove an agent from an Agent Group, from the **Users** tab, click the agent's **Name**. From the left-hand navigation menu, click **User > Agent Groups**. From here you can check the checkbox next to each Agent Group you wish to remove from the agent's list, then click **Remove**.

Note: Clicking **Remove** only removes the user from that Agent Group, it does not delete the Agent Group.

Configuring the desktop for an Agent Group



The screenshot shows a web interface for configuring an Agent Group. On the left is a sidebar with a menu under the heading 'Agent Group'. The menu items are: General Info (highlighted with a blue bar), Agents, Supervisors, Dispositions, Custom Agent States, Favorites Pool, Group Favorites, External URLs, Agent Statistics, Contact Center Statistics, Case Data, and Toast Data. The main area is titled 'General Info' and contains the following fields and controls:

- Agent Group Name:** A text input field containing 'CXContactEMailGroup'.
- Folder:** A text input field containing '/'. Below it is a dropdown arrow.
- Type:** Two radio buttons: 'Agent Group' (selected) and 'Virtual Agent Group'.
- State:** Two radio buttons: 'Enable' (selected) and 'Disable'.
- Agent Group Voicemail:** A text input field.
- At the bottom are two blue buttons: 'Origination DNs' and 'Annex'.

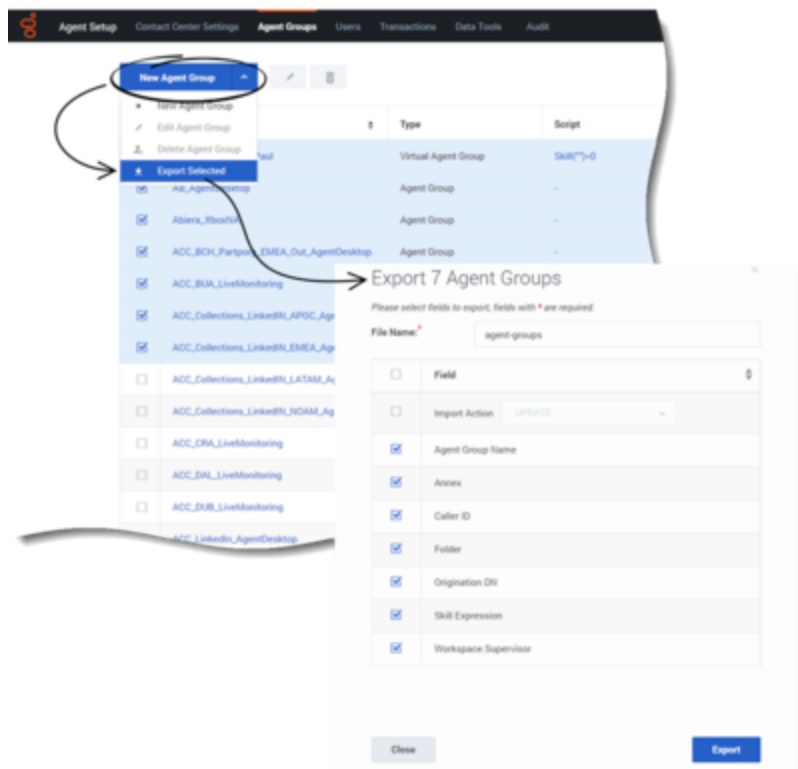
After you populate your Agent Group with agents, you can assign objects to the group. Under each of the following tabs, make your selections:

- Dispositions
- Custom agent states: Custom Agent States only displays existing **Not Ready** codes created under the Contact Center Settings.
- Group favorites: Group favorites are configured the same way as Global Favorites.
- External URLs
- Statistics options
- Case and toast data
- Caller ID
- Gplus Adapter for Salesforce options: Use the **Gplus Salesforce** tabs to configure the Gplus Adapter settings for the Agent Group.

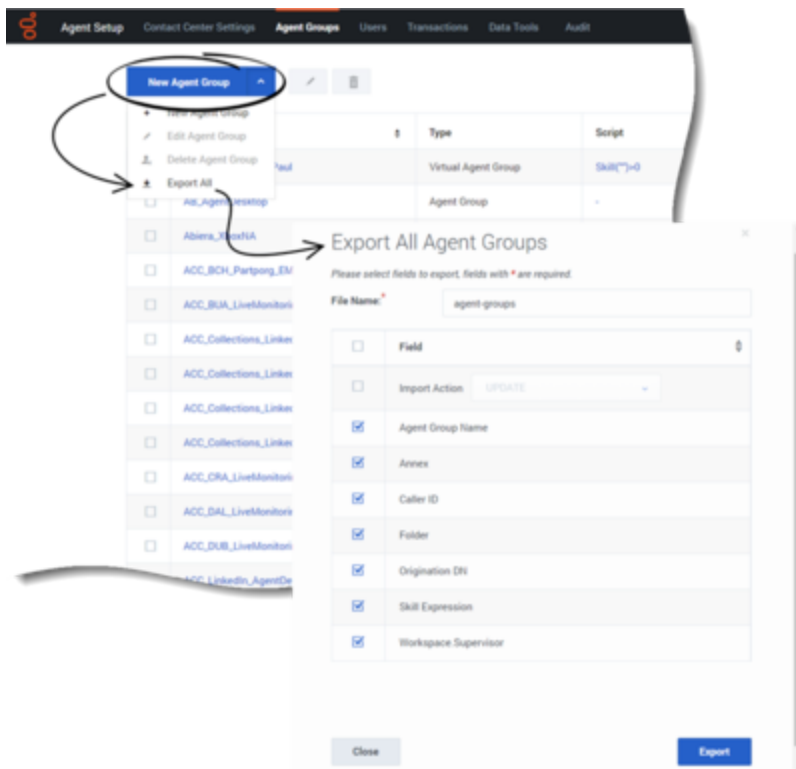
Exporting Agent Groups

You can export Agent Groups two ways. From the **Agent Groups** tab, you can export *selected* Agent Groups from the list, or you can export *all* Agent Groups.

To export only selected Agent Groups, check the checkbox next to the **Agent Group Names** you wish to export. Click the drop-down arrow next to **New Agent Group**, and select **Export Selected**. The export window opens and, from here, you can choose the **File Name**, as well as which fields to export. Once you click **Export** a .csv file is saved to your local machine.



To export all Agent Groups, click the drop-down arrow next to **New Agent Group**, and select **Export All**. The export window opens and, from here, you can choose the **File Name**, as well as which fields to export. Once you click **Export** a .csv file is saved to your local machine.



If you wish to stop the export, click the "x" at the end of the percentage bar and the confirmation window will open. Click **OK** or **Cancel**.

*Please select fields to export, fields with * are required.*

File Name:

5%

Next Steps

After you have configured Agent Groups, you can proceed to configure:

- Business attribute overrides (Transactions)
- Templates