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Manage your Contact Center in Agent Setup

Agent groups

5/18/2022

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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.

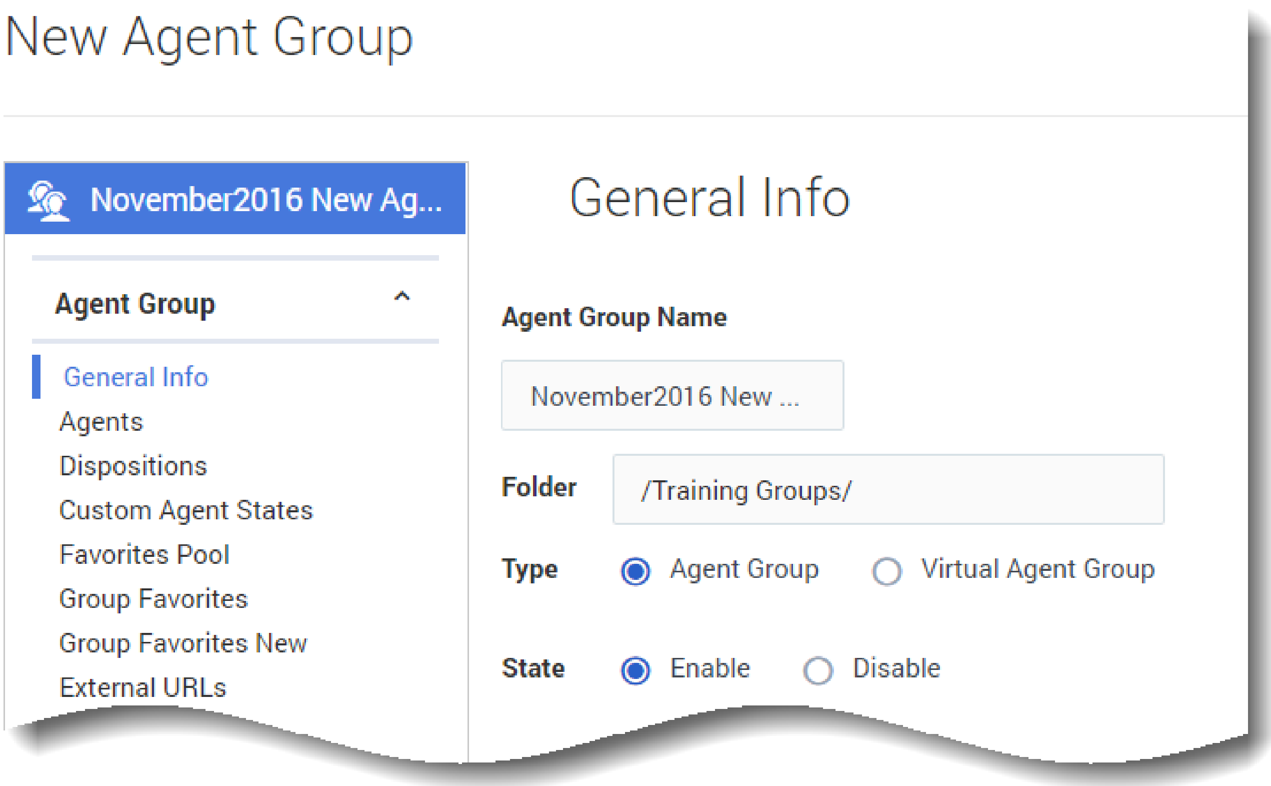
Configuring Agent Groups

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

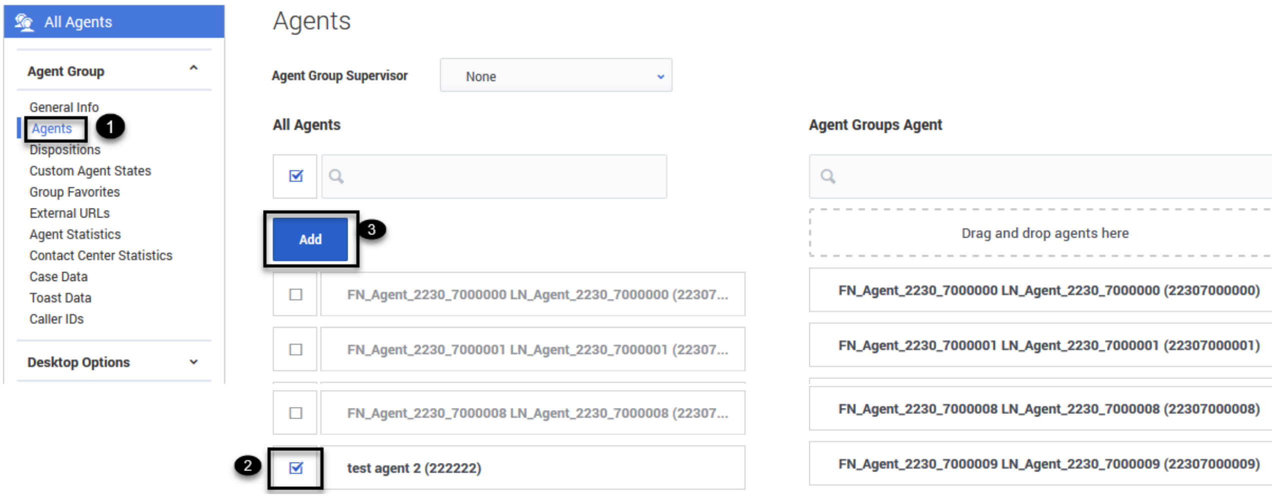


In the **New Agent Group** window, type the name you want to assign to the Agent Group and click **Save**. In our example, the new Agent Group is a group of new hires, so let's name the Agent Group `November2016 New Agents`.

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



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

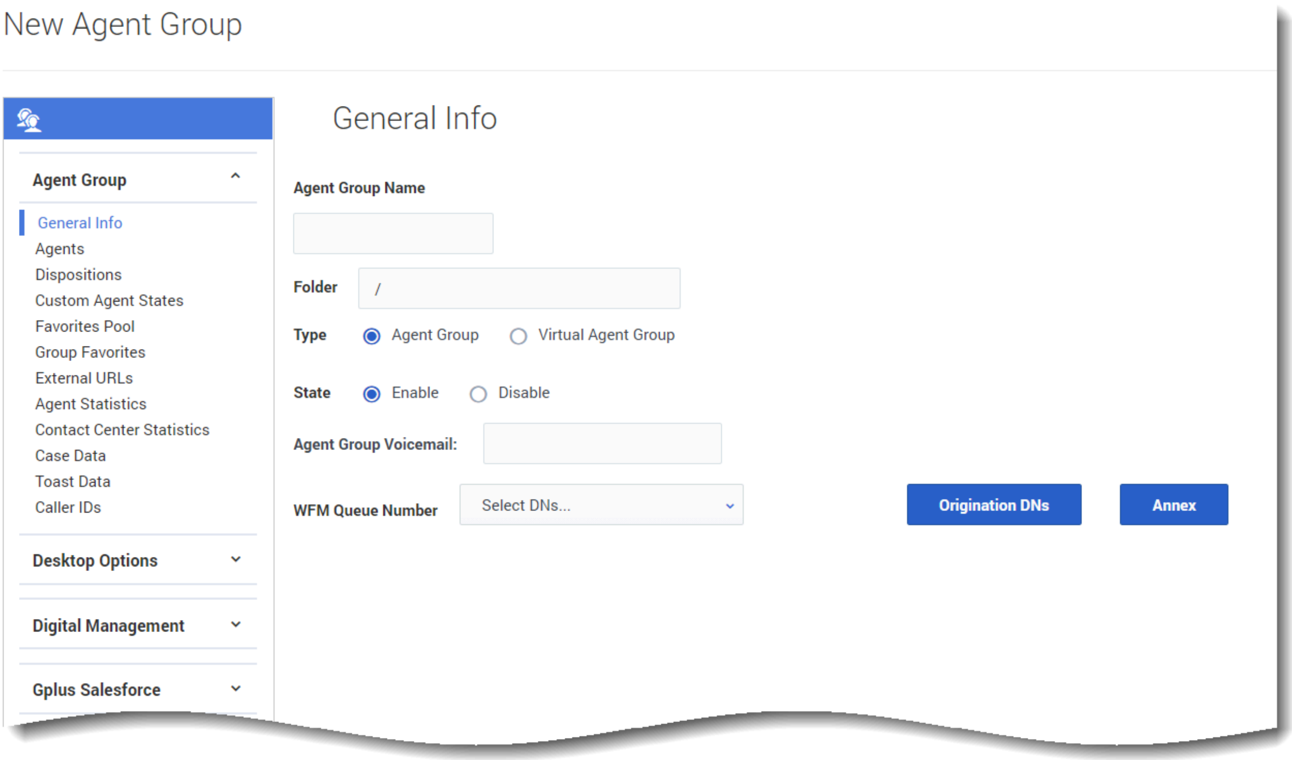
You can either drag the agent over to the Agent Groups Agent column, or you can click the box next to the agent's name in the All Agents list and then click Add. This automatically drops the agent into the Agent Groups Agent list.

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** drop-down list 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.

Creating a virtual Agent Group

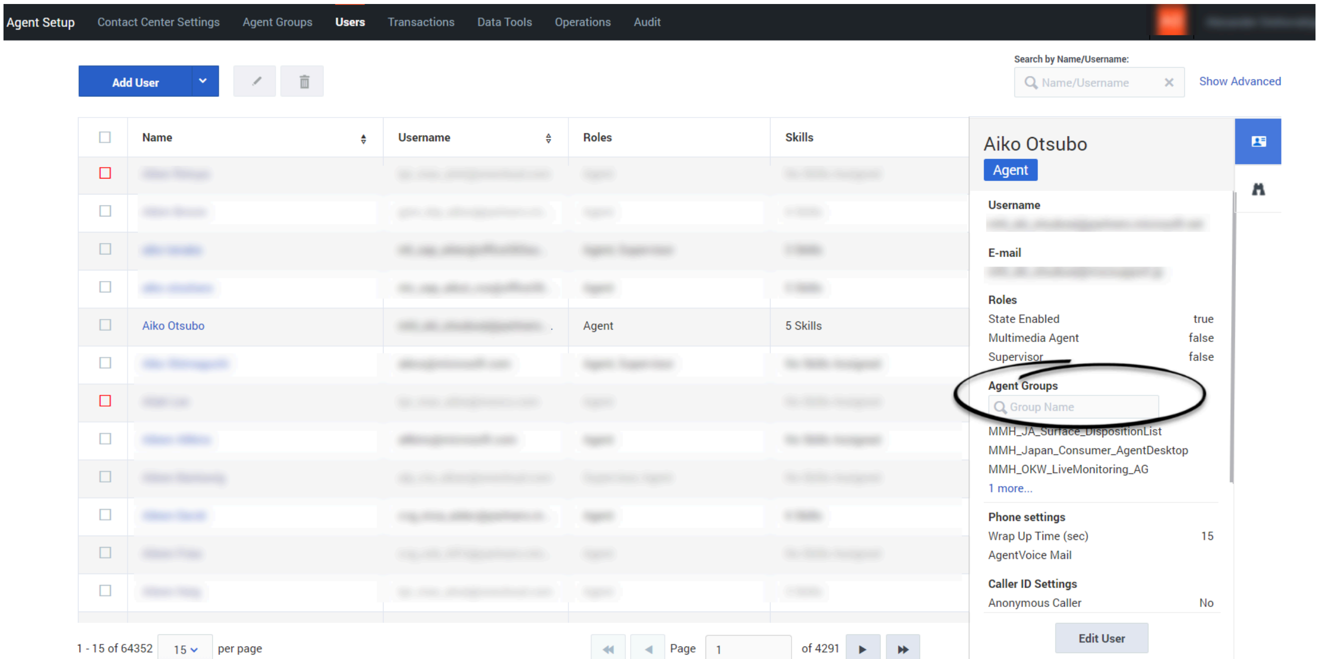


You can create a virtual Agent Group by specifying a script when you add an Agent Group.

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.

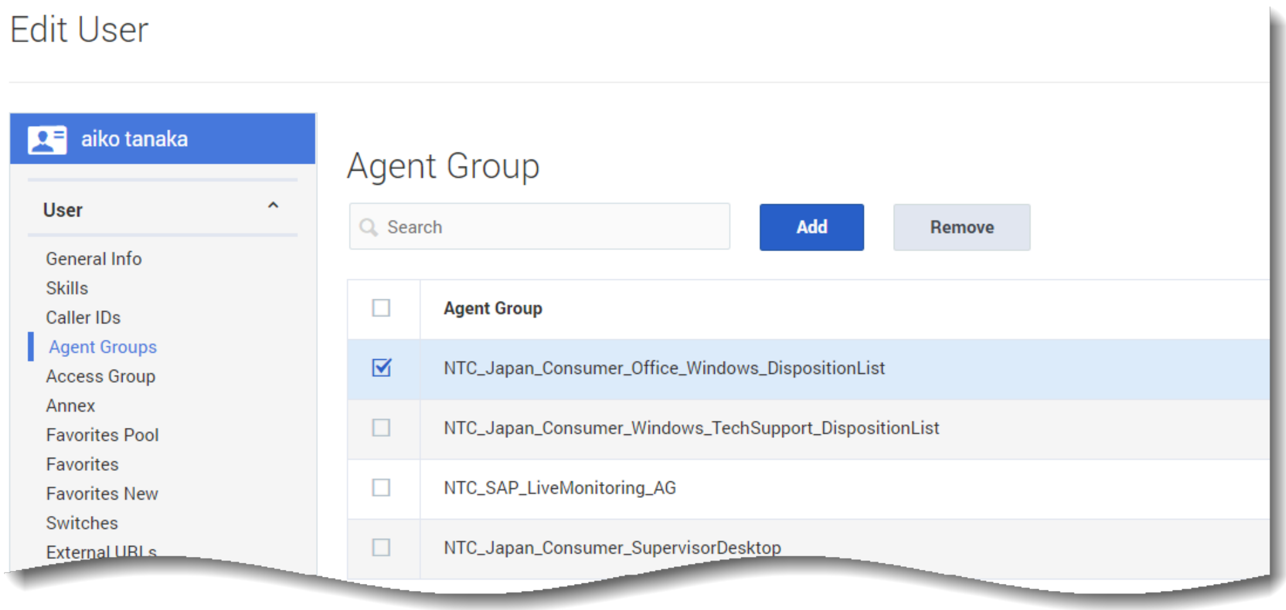
After you add the script, you will see a link in the **Script** column on the **Agent Groups** page. The script identifies the common skills shared by all agents that belong to the group. You can edit the script by double-clicking the script text and then updating the script in the dialog box that is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

Viewing an agent's Agent Groups



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.

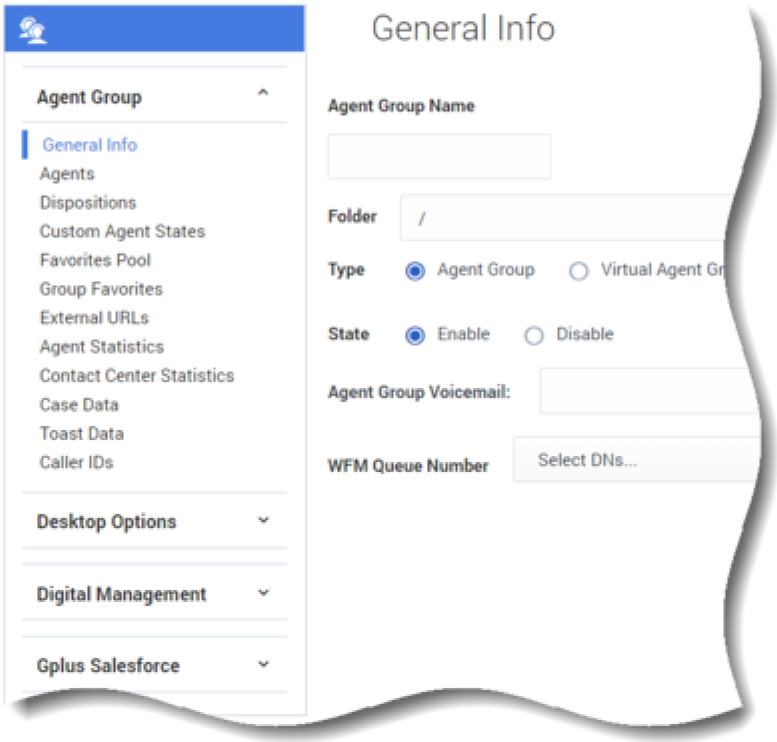
Editing an agent's Agent Groups



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



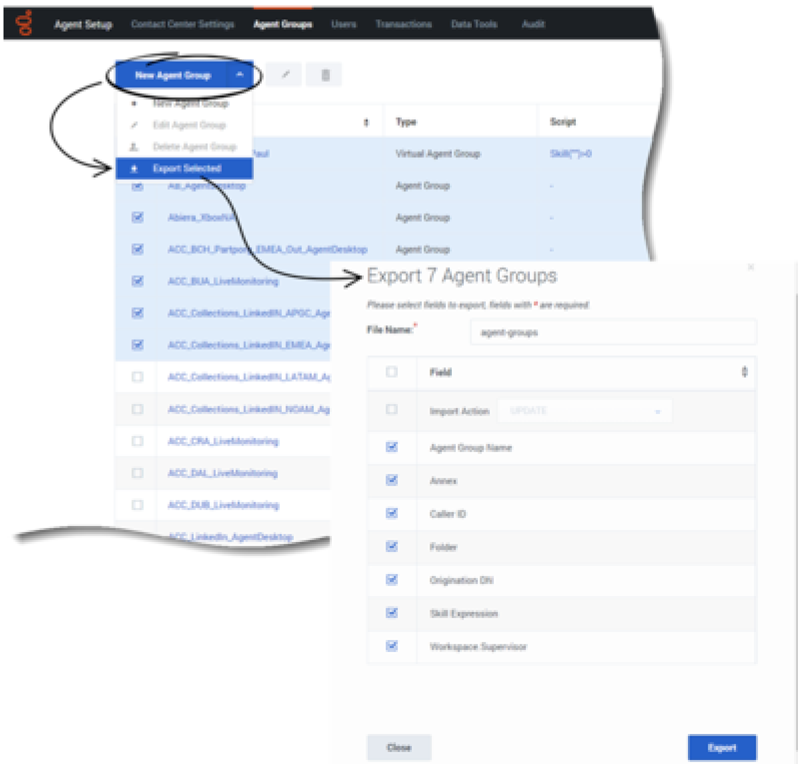
After you populate your Agent Group with agents, you can assign objects to the group. Under each of the following tabs, make your selections:

- 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.

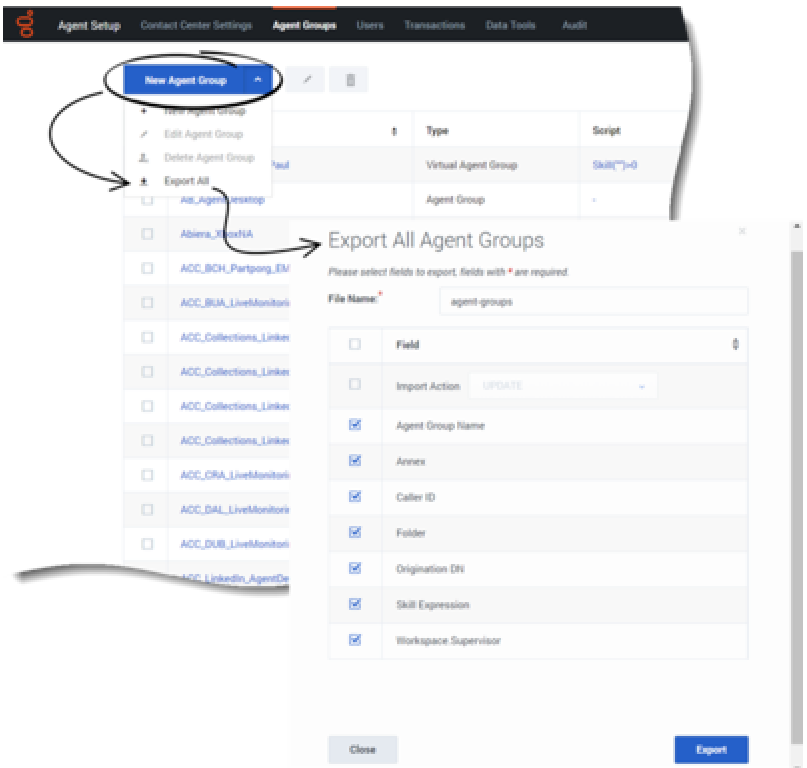
Exporting Agent Groups

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.

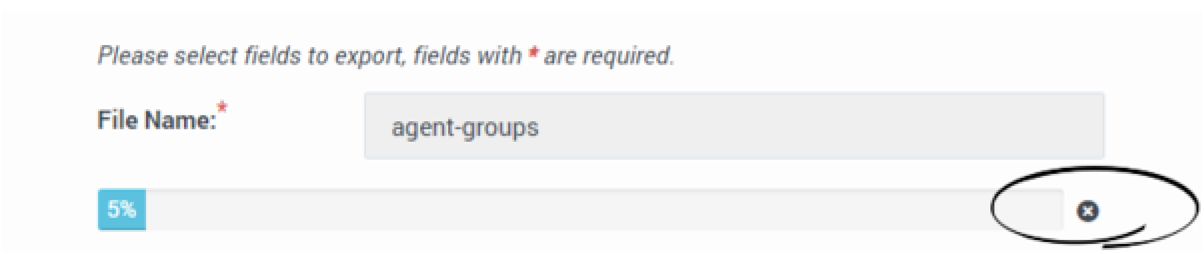
To export only selected Agent Groups, check the checkbox next to the **Agent Group Names** you wish to export. Click the drop-down arrow next to **New Agent Group**, and select **Export Selected**. The export window opens and, from here, you can choose the **File Name**, as well as which fields to export.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



Next Steps

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

- Business attribute overrides (Transactions)
- Templates