



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Manage your Contact Center in Agent Setup

Scenario: Onboarding agents and supervisors

5/27/2026

Contents

- 1 Overview
- 2 Before you begin
 - 2.1 Templates
 - 2.2 Business Attributes
- 3 Create the users with bulk import
- 4 Add a supervisor
- 5 Add agents to the agent group
- 6 Configure agent controls and settings



- Administrator

This article walks you through the tasks required to set up new agents.

Related documentation:

-

Overview

Scenario: You're an administrator for a contact center that just hired 12 new users: 11 agents and 1 supervisor. You need to go through the process of setting them up and getting them ready to handle calls. This article walks you through the process.

Here's a quick glance at what you'll do and what you'll use to get through this process:

- You'll import the new users using the bulk import tool.
- You'll apply a pre-configured Person template.
- You'll assign a supervisor role to one of the new users.
- You'll add a new agent group for the agents.
- You have business attributes you'll use when you configure user options.

Before you begin

Before you jump in, take a look at what you already have in your contact center and how those assets will aid in the setup process. You're looking for entities that hold information that can be applied over and over again.

Templates

Templates and business attributes should come to mind. Both of these entities store information, such as DNs, switches, channels, agent skills, dispositions, and Caller ID.

You'll find your templates at **Contact Center Settings > Templates**. For our example, let's say you found a template called Billing Agents Template. The information stored in this template--such as the agent skills, the channels they'll use, and all the Place information--matches to the agents you're onboarding. This means you won't need to assign this information to each individual agent. For more information about templates, see Templates.

Business Attributes

Business attributes are basically containers that store information about the following contact center objects:

- Caller ID
- Case Data
- Toast Data
- Dispositions

For more information, see Business attributes.

Using existing templates and business attributes will save you time and effort in the steps that follow.

Create the users with bulk import

Now you need to get the new users into the system. That basically means you need to create a new profile for each one of them.

Since you have a large number of agents, you should use bulk import. This is a simplified alternative to creating agents manually, one at a time.

Before you start the bulk import process, ensure that your agent information is contained in a CSV file and follows the formatting and layout standards outlined in Import agent accounts.

When your file is ready, go to **Data Tools > Bulk Import**. This is where you'll upload your CSV file and choose a template that contains the information that can be applied to the agents being imported. Note that if your CSV file contains a value (for example, a skill value) that doesn't match to that object's value specified in the Person template, the value contained in the CSV file overrules. For more detailed information about bulk operations, see Bulk import.

When the import is complete, go to the Users tab to see the agents you just imported. Now that the agents are in the system, you can view and edit their information as you see fit.

Add a supervisor

Let's say that one of the new 12 new users recently hired has been assigned a supervisory role. The process of setting up a supervisor is not that different from the agent setup process. After you import the agents using the Bulk import process:

1. Go to the **Users** tab.
2. Find the agent who will have the supervisory role.
3. In the General Information section of the agent's profile, tick the Supervisor check box.

On the options panel, notice the Supervisor options. Those options will apply to this user.

Add agents to the agent group

Now that you've created the agents, you'll need to place them in an agent groups, which is a logical grouping of agents who share the same agent profile, such as skills, access rights, and so on. If you're creating a brand new agent group for them, here are the instructions:

1. Click the **Agent Group** tab (located on the menu bar at the top of the page)
2. Click **New Agent Group**.
3. Give the agent group a unique name.

Now, you'll notice that the name of your agent group appears at the top of options panel, in the left-hand margin of the screen. This lets you know that you're enabling options for this entire agent group, not just the agents within it. We'll cover the most important options in the sections that follow.

To assign the agents to an agent group:

1. Click the **Agent Group** tab (located on the menu bar at the top of the page).
2. Click **Agents**. You'll see a list of all agents.
3. Drag and drop the names of the 12 new agents.

If you create a new agent group, you'll need to go through each of the options listed in the options pane and configure them accordingly. Some of those options will automatically apply to the agents within the group, but other options can only be configured at the agent group level or the user level.

For more information, Settings and configuration overview lists options available in Agent Setup and the level at which those options can be controlled (distinguishes between contact center, agent group, and user).

Configure agent controls and settings

At this point, you've added your users, assigned them skills (via the template or CSV file), and assigned them to an agent group.

Now, what you need to do is configure all the options that help them carry out interactions with customers. This includes everything from call controls, dispositions, Caller ID, and so on. See Agent settings overview.