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Manage your Contact Center in Agent Setup

Templates

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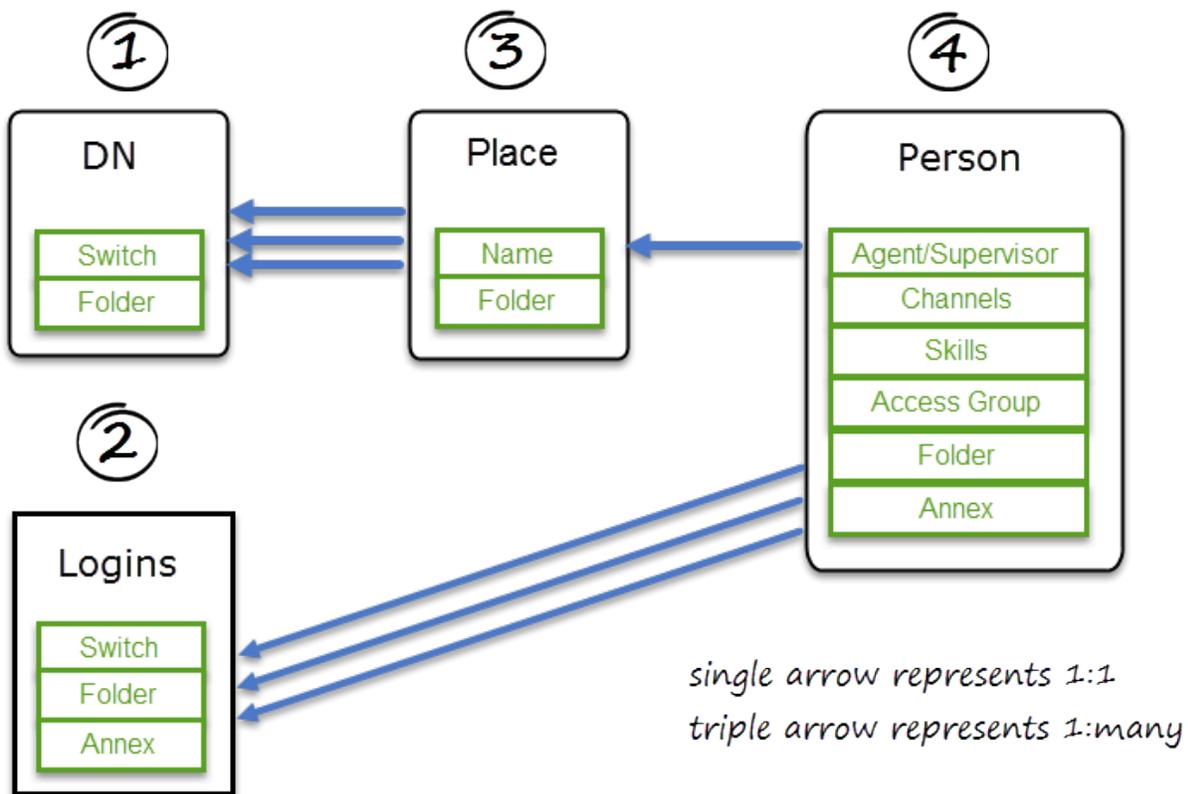
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Create templates to enable you to create and provision agents efficiently.

Related documentation:

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Templates allow you to create a set of configuration options that you can apply to agent accounts when you add an agent. The following diagram shows the relationship between the templates and the sequence in which the templates must be created:



Access the **Templates** tabs on the **Contact Center Settings** page.

To add a template, select a template type, and then click **Add**. For each template you create, ensure that you give the template a unique name.

To configure a specific template, click on the **Template Name** and make your intended changes.

DN template

Add "dn" Template ✕

Template Name

Switch

Folder: /

DN Templates specify the switch and folder where the DN needs to be created.

Login template

Add "agent-login" Template ✕

Template Name

Agent Login Name

Switch

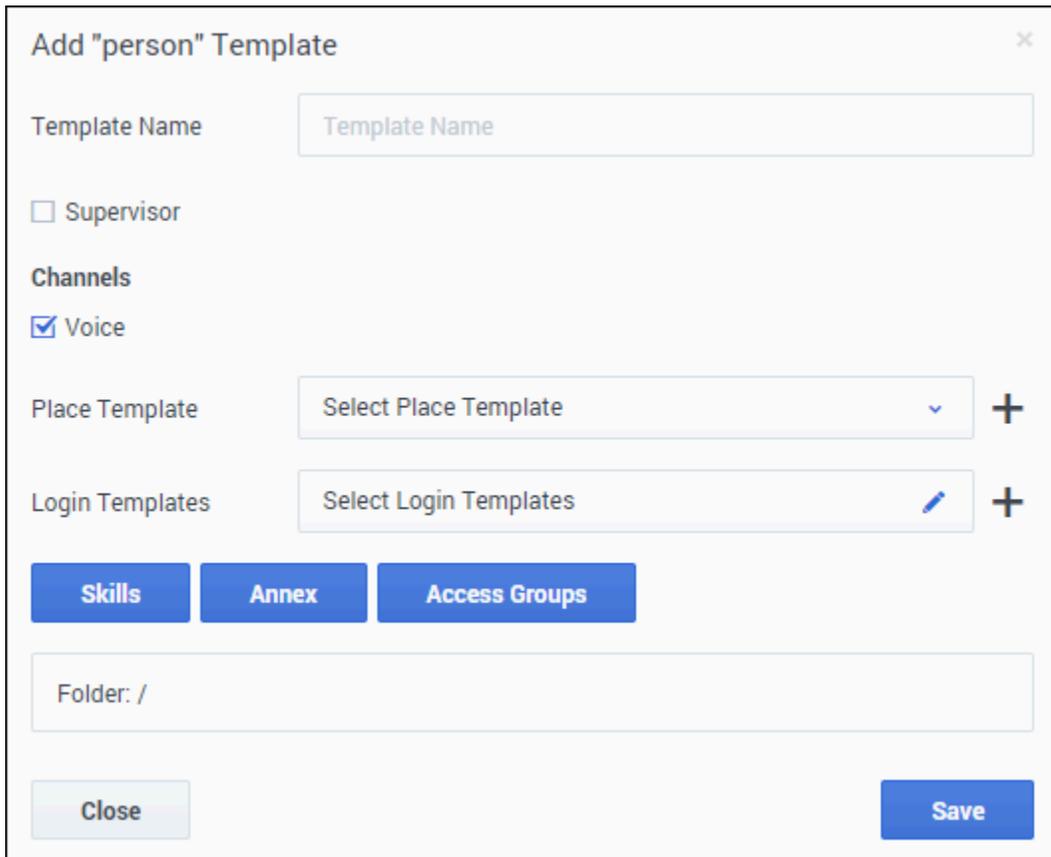
Folder: /

Agent Login Templates specify the switch, folder, and annex options.

In the **Agent Login Name** field, you can use a variable to specify the contents of the field, for

example, `{{person.userName}}`.

Person Templates



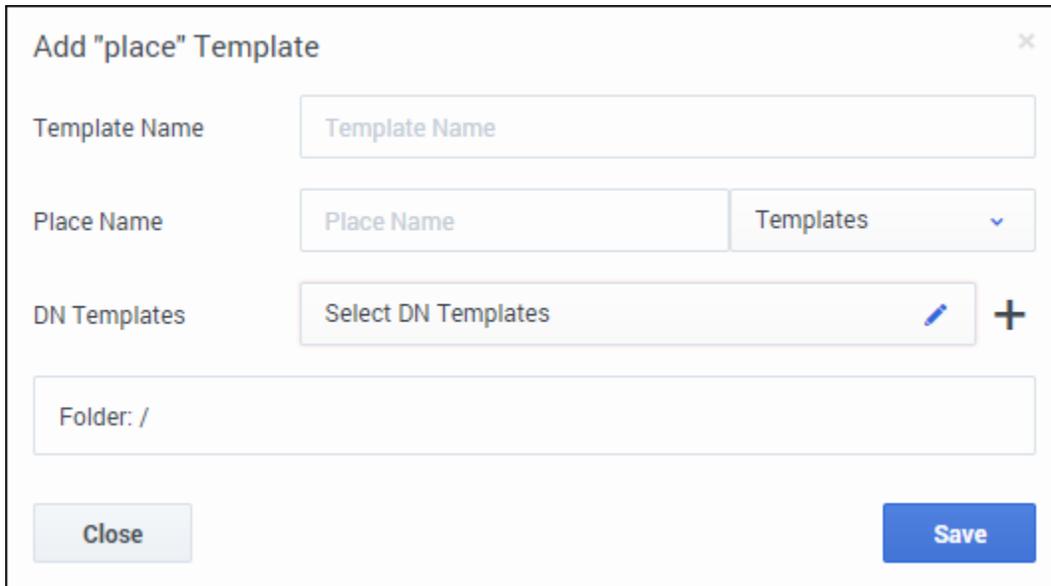
The screenshot shows a dialog box titled "Add 'person' Template" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Template Name:** A text input field with the placeholder text "Template Name".
- Supervisor:** A checkbox that is currently unchecked.
- Channels:** A section header with a checked checkbox for "Voice".
- Place Template:** A dropdown menu with the text "Select Place Template" and a downward arrow, accompanied by a plus sign (+) button.
- Login Templates:** A dropdown menu with the text "Select Login Templates" and a pencil icon, accompanied by a plus sign (+) button.
- Skills, Annex, Access Groups:** Three blue buttons with white text, each representing a selection option.
- Folder:** A text input field with the placeholder text "Folder: /".
- Close:** A light gray button in the bottom left corner.
- Save:** A blue button with white text in the bottom right corner.

Person Templates define properties such as Channels, Skills, Access Groups, Annex options, folder, and Supervisor role for newly created agents.

You also need to select a place template and one or more login templates. Then you can select the channels, skills, annex, and access groups that you want to apply to this template. Before you save the **Person** template, select the folder where the user is created.

Place template



The screenshot shows a dialog box titled "Add 'place' Template" with a close button (X) in the top right corner. It contains the following fields and controls:

- Template Name:** A text input field with the placeholder text "Template Name".
- Place Name:** A text input field with the placeholder text "Place Name" and a dropdown menu to its right labeled "Templates" with a downward arrow.
- DN Templates:** A text input field with the placeholder text "Select DN Templates", a blue pencil icon, and a plus sign (+) to its right.
- Folder:** A text input field with the placeholder text "Folder: /".
- Buttons:** A "Close" button on the bottom left and a "Save" button on the bottom right.

Place Templates must contain one or more DN Templates.

If your contact center has a requirement to specify unique place names for different business groups or regions, type a place name variable. For example, the place name might be the same as the agent's phone number or as the agent's user name. Place names can contain the following variables:

- {{person.userName}}
- {{person.emailAddress}}
- {{phone.number}}
- {{phone.description}}
- {{phone.index}}

You can also combine variables. For example: {{person.userName}}-{{phone.index}} creates **JohnAppleseed-1** and **JohnAppleseed-2** if JohnAppleseed has two phone numbers.

Next Steps

Now that you have set up templates, you can proceed to provision your contact center with agents. See [Manage agents and other users](#).