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Workforce Management Web for Supervisors (Classic) Help

Contract Shifts, Agents, and Profiles

1/10/2026

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Assign and manage shifts, agents, and profiles in contracts.

Related documentation:

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Shifts in contracts

The **Shifts** pane displays the shifts that can be associated with this contract. All shifts configured for the site associated with this contract are listed.

The shifts you select must have settings that are compatible with the contract settings. Otherwise, WFM displays an error message. If the settings for at least one day are compatible, WFM accepts the association. Use the **Contracts > Shifts** pane when you create or edit contracts.

To view the **Shifts** pane for an existing contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select a site
3. In the **Contracts** pane, select an existing contract.
   The Constraints pane is displayed by default.
4. In the right-side pane, select **Shifts**.
   The Shifts pane is displayed containing a list of shifts that are associated with this contract.

The Shifts pane displays the details for assigned shifts in the following columns:

- **Name**—The name of the assigned shift.
- **Earliest Start**—The earliest start time for this shift.
- **Latest End**—The latest end time for this shift.
- **State**—The state of the shift, either Primary or Secondary.

Use the **Shifts** pane to assign shifts to the **Contract** or change the state of an assignment.

> **Important**
> If you make changes that do not pass validation, the **Review Validation Messages**

pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Assigning shifts to contracts

To assign shifts to a contract:

1. In the **Contracts** pane, select a contract from the list of existing contracts.
2. Click **Assign Shifts** .
   The Available Shifts pane opens with details in the Name, Earliest Start, and Latest End columns. Alternatively, if you want to unassign a shift, click Unassign Shifts .
3. In the **Use This State for Assignments** drop-down list, select **Primary** or **Secondary**.
4. In the **Available Shifts to be Associated with Contract** section, select one or more shifts.
   Search for a specific shift by typing the shift name in the Search field, if desired.
5. To associate the shift(s) with this contract, click **Apply** .
   The selected shifts are displayed in the Shifts pane.
6. Close the **Available Shifts** pane, and on the **Shifts** pane, click **Save Changes** .
   You can configure shifts for a selected site in the Policies > Shifts view.

Removing shifts from contracts

To remove shifts from a contract:

1. In the **Contracts** pane, select a contract from the list of existing contracts.
2. In the **Associating Shifts for shift name>** list, select the shift you want to remove and click **Unassign Shifts** .
   The shift if removed from the list.
3. In the **Shifts** pane, click **Save Changes** .

Changing the state of an assigned shift

To change the state of an assigned shift:

1. In the **Contracts** pane, select the contract to which the shift you want to change is assigned.
2. In the **Associated Shifts for contract name>** section, from the drop-down list in the **State** column, change the state to either **Primary** (default) or **Secondary**.
3. To save the changes, click **Save Changes** .

To select multiple shifts, hold down SHIFT or CTRL and click each additional shift.

Agents in contracts

Use the **Agents** pane in the **Contracts** view to create or edit contracts. View agents associated with existing contracts and associate agents with new contracts.

To view the agents associated with an existing contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select a site
3. In the **Contracts** pane, select an existing contract.
   The Constraints pane displays by default.
4. In the right-side pane, select the **Agents**.
   The Agents pane displays containing a list of agents that are associated with this contract on the selected date.

To change the date field in the **Agents** or Available Agents pane, click inside the field and a calendar is displayed. Select the date, as required. If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which contains a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Use the **Contracts > Agents** pane to specify an effective start date for the selected contract and assign agents to the contract. You can also assign effective dates for contracts in the **Configuration > Agents > Contracts and Rotating Patterns** pane.

Associating agents with contracts

To associating agents with a contract:

1. In the **Contracts** pane, select a contract from the list of existing contracts.
2. Click **Show Available Agents** .
3. In the Effective Date field, enter the effective start date for this contact assignment.
4. Select one or more agents from the **Agents to be Associate with contract name>** section.
   Enter search criteria into the Search field and use the radio buttons to filter on First or Last Name, if the list of agents is long.
5. To associate the agent(s) with this contract, click **Apply** .
6. Close the **Available Agents** pane, and on the **Agents** pane, click **Save Changes** .

Agents—The agents that can be associated with this contract. All agents from the current site are listed.

Effective Date—The effective start date that is specified for this contract assignment.

Effective dates in contracts

Contracts that are assigned to an agent have a start date that specifies when the assigned contract becomes effective. Agents can have multiple contracts with different start dates assigned to them, but all assigned contracts must have different start dates. In this way, an agent can have only one effective contract on any given day.

> **Important**
>
> You can specify an effective start date for an assigned contract that has daily granularity, but you cannot specify an effective start time.

Contract assignments might not always have an effective start date. If an effective start date is not specified, the contract is considered to be assigned to the agent from the *beginning of time*. The agent will have only one contract assigned from the *beginning of time*. All other assignments to that agent, must have specific effective start dates that are unique for each contract assigned.

If the agent does not have a contract assigned with no start date, it is assumed that the agent had no contract between the *beginning of time* and the earliest contract assignment.

There is no explicit end date for contract assignments. The agent has only one effective contract at the time, because an assigned contract ceases to be effective on the start date of another. The assigned contract with the latest effective start date is assumed to be effective until the *end of time*. This approach simplifies contract assignment and guarantees that contracts that are assigned to agents have no gaps in the effective intervals.

You can specify an effective start date for an assigned contract in **Contracts** on the **Agent** assignment tab, see the procedure below.

Profiles in contracts

In WFM, *Profiles* are descriptions of virtual agents.

You can configure multiple profiles for each contract by selecting typical sets of skills. The WFM Scheduler uses contract parameters, combined with the profiles' skill sets, to produce blank schedule scenarios that are based on profile characteristics rather than on the actual agent pool. This is especially useful if you have not yet hired agents.

These blank schedule scenarios provide you with an unlimited number of "what-if" assessments of the number of agents of each contract and skill set that might be required. You can manually assign agents into the schedule after it is built.

You can create a new profile, copy an existing profile and rename it to create a new one, or delete a profile.

Creating profiles

To create a profile:

1. Click **Policies > Contracts** and then, in the **Objects** pane, select a site.
2. In the **Contracts** pane, select a specific contract.
   The **Constraints** pane displays, by default.
3. At the top of the pane, select **Profiles**.
   A list of profiles that have been created for this contract displays.
4. In the **Profiles** pane, to create a new profile, click **Add Profile** .
5. When the **Profile Properties** opens, enter a name for the profile.
   The name should be descriptive and different from any other profile name within the contract.
6. To add skills to the profile, click **Add Skill** .
   A list of available skills is displayed in the **Selected Skills to be Associated With Profiles** section.

> **Tip**
>
> Alternatively, if you want to remove a skill, click **Delete Skill** .

7. Select the skills you want to associate with this profile, and then, click **Add Skill** .
8. In the **Use this Level for Assignments** field of the **Available Skills** pane, enter the correct skill level.

> **Important**
>
> The value that you enter will affect the profile's availability on the **Select Profiles** page of the **Schedule Scenario Wizard**. That page displays only profiles with a skill level that falls within the required range of the **Activities** that you are scheduling. For example, if you define a profile here with a Stocks & Bonds skill level of 5, and then use the wizard to create a scenario that requires a Stocks & Bonds skill level of 8–30, your profile will not appear as a choice, because 5 is not between 8 and 30.

9. Continue to add skills and set skill levels until you have fully configured the profile.
10. To save the profile setting, click **Save Changes** .

Deleting profiles

To delete a profile:

1. Click **Policies > Contracts** and then, in the **Objects** pane, select a site.
2. In the **Contracts** pane, select a specific contract.

The **Constraints** pane displays, by default.

3. In this pane, select **Profiles**.
   A list of profiles that have been created for this contract displays.

4. In the **Associated Profiles** section, select the profile you want to delete and click **Delete Profile** .
   The profile is removed from the list.

5. To save the changes, click **Save Changes** .

Copying profiles

To create a profile by copying an existing profile:

1. In the **Policies > Contracts > Profiles** pane, select an existing profile in the **Associated Profiles** section.

2. Click **Copy Selected Profile** .
   The **Copy Selected Profile To Another Contract** pane displays.

3. In the **Name** field, rename the profile.

4. In the **Copy Selected Profile to Another Contract** section, select a contract from the list.

> **Tip**
> Alternatively, if you know the **Contract** name, you can type it in the **Search** field to find it quickly.

5. Click **Save Profile** .
   The profile is added to the list of **Associated Profiles**.

> **Tip**
> If the contract you selected in step 4 is different from the contract selected in step1, the copied profile is visible only after you navigate to the list of profiles under the appropriate site for this contract. If the contract selected in step 4 is the same, the copied profile is visible in the profile list immediately after it is copied.

6. Configure the profile. The settings are described in steps 7–10 above.

Advanced hours

The **Advanced Hours** option, which opens the **Advanced Hours** pane, is used only if you are using **Monthly** schedule planning periods. For information about monthly schedule planning periods, see

the **Contracts** > Site Settings tab.

The **Advanced Hours** pane defines the Contract's minimum and maximum hours.

The values in this pane override the standard Contract hours. You can use these values if you have to customize monthly workloads to handle seasonal variations in staffing requirements.

> **Tip**
>
> If you set the value for a month to `0`, the Contract constraints for monthly minimum and maximum working hours are used.