

# Agent Editor

## Overview

The **Agent Editor** screen is for adding and managing login credentials for Agents. An Agent is a special account on the system specifically for IntellaQueue tracking and usage.

Each Agent requires an available license in order to be created.

Even though Agent logins are not bound to a particular device or extension, the device that they use must be set to allow agent logins for IntellaQueue, or they will be disallowed from doing so even with a proper agent license.

## Adding a New Agent

1) Click the **New Agent** button and fill out the various fields for the Agent:

- Keep in mind Agent Num and (optional) Agent Pin are number-only fields
- The **Associated User** field will list all of the users available
  - Multiple Agents can be associated with the same user if that Agent has multiple phones
  - As part of the **[development road map: new Agent Device handling]** will take care of Agents that have multiple phones to no longer need multiple Agent logins.

[image.png](#)

	Field	Type	Description
<b>Required</b>	First Name	Text	For new Agent
	Last Name	Text	For new Agent
	Agent Num	Numeric	Number that the Agent will be using to login
<b>Optional</b>	Pin	Numeric	Security pin for Agent login, recommended to prevent people logging in using the wrong agent number

	Field	Type	Description
	Associated User	List	<p>The Agent's own web portal user account. This is used for reporting purposes and only if Agents are not hot-desking</p> <ul style="list-style-type: none"> <li>• All of the calls the extension has made/received while the Agent was not logged in will be known</li> </ul>
<b>View Only</b>	Manager	Boolean	<p>If Yes, then the <b>[Agent Toolbar]</b> has extended capabilities including:</p> <ul style="list-style-type: none"> <li>• Live call monitoring</li> <li>• Controlling Agent status</li> <li>• Setting <b>[Manager Only Statuses]</b> on Agents</li> </ul> <p>Use the <b>[License Manager]</b> to set which Agents have Manager status.</p>

2) Next select an **Agent Num** and an **Agent Pin** (optional).

[image.png](#)

3) Lastly, you can associate a user account with the Agent.

4) Click the **Save** button. After you click save, you will see a message stating **Changes Saved**.

[image.png](#)

## Deleting an Agent

1) Navigate to the **Agent Editor** screen via the **Navigation Panel**.

2) Find the Agent you wish to delete, highlight it by clicking on it, and then click the red **X** under the **Delete** column.

3) A confirmation pop-up will appear confirming your selection. Click **OK** to confirm. You will see a message stating **Changes Saved**.

[image.png](#)

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