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.

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	Field	Type	Description
Required	First Name	Text	For new Agent
	Last Name	Text	For new Agent
	Agent Num	Numeric	Number that the Agent will be using to login

	Field	Type	Description
Optional	Pin	Numeric	Security pin for Agent login, recommended to prevent people logging in using the wrong agent number
	Associated User	List	The Agent's own web portal user account. This is used for reporting purposes and only if Agents are not hot-desking • All of the calls the extension has made/received while the Agent was not logged in will be known
View Only	Manager	Boolean	If Yes, then the **[Agent Toolbar]** has extended capabilities including: • Live call monitoring • Controlling Agent status • Setting **[Manager Only Statuses]** on Agents Use the **[License Manager]** to set which Agents have Manager status.

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

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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**.

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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**.

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