User Type Overview

Flow has several user types that grant different levels of access to modify settings within Flow. Different levels have access to dashboards and functions tailored to the tasks that the user performs within the contact center.

Agents: Access only to the Agent Dashboard. Within the Agent Dashboard, agents have access to the following:

- Ability to receive calls from assigned queues
- Access to caller information from CRM or IVRs (automated pre-agent menus)
- Set their status (available, offline, wrap, etc.)
- Flag a Supervisor or Team Lead for assistance
- Log in/out of Flow
- Connect an extension to Flow to receive calls.
- Transfer calls

Team Leader: Access to select dashboard features. Team Leaders can:

- Ability to receive calls from assigned queues
- Help with flagged calls

Supervisor: Access to the Supervisor Dashboard which provides advanced options for managing agents and queues. Features for Supervisors include:

- Access to the Supervisor Home dashboard
- Access to the Monitoring dashboard
- Add, modify, or delete agents:
    - Modify agents name and agent ID
    - Reset agent passwords
    - Modify agent's queue membership
    - Modify agent's skills
    - Set agent's team
- Change an agent's current status
- Add, modify, or disable queues
    - Set Queue overflow parameters
    - Set call escalation/property (SLA) rules
- View Call Logs

Manager: The most privileged user type with complete access to the account. Managers have access to all Supervisor features as well as:

- Add, modify, or delete Skills
- Add, modify, or delete Teams
- Add, modify, or delete entries in the Global Directory
- Add, modify, or delete entries in Phone Numbers
- Add, modify, or delete User (team lead, supervisor, manager):
    - Change Supervisors assigned Teams
    - Reset users passwords
- Edit account info

Related articles

- User Type Overview
- Agent Dashboard Overview
- Supervisor Home Overview
- Skills and Proficiency
- Call Priority and Escalation