

Managing Flow Agents

It is common to need to update Agent information, assignments, and recover/reset Agent passwords. This article describes how to manage necessary changes to Agents in Flow for Supervisors and Managers.

Locating the Agent

Changes made to an Agent's configuration are done by first selecting **Agents** from the left-hand docked menu. If this is not visible, you have likely collapsed the menu - the Agent icon will still be visible and selected instead.

Agents to manage can be found by browsing the populated list or by searching their name in the search bar. Once you have located the Agent you wish to manage, select or tap the Agent.

What Can Be Modified

The following properties can be updated in the Agent configuration view:

- Agent first and/or last name
- Agent profile image
- Agent current status*
- Agent's assigned Team
- Agent's ID number**
- Agent's email address
- Agent's password***
- Agent Unavailable Destination
- Enabling/disabling Agent Screen Pop and the associated URL
- Enabling/disabling recordings specifically for this Agent
- Showing/hiding this Agent from the Directory
- Agent skills and proficiency
- Agent assigned queues



*Changing an Agent's current status will override statuses set by Flow. Avoid changing Agent statuses directly unless correcting mismanagement, such as Agents remaining in Available after leaving for the day

**Avoid changing the Agent's ID Number frequently as it may cause collision with an already in use agent ID

***If updating an Agent's password to log in to Flow, you will need to communicate what this password has been updated to. Flow will not email the agent notification of this change as the Agent may not have an email address set

Applying Changes

When you are ready to apply the changes made to the Agent's configuration, hit the **Save** button at the bottom of the page. *If you do not hit Save all pending changes are not applied.*