Agents and Teams | Add an Agent

Introduction

Prerequisite: Log in to your admin account in CCAIP.

Scenario: In this exercise, you will add an agent to the platform.

Directions:
1. Navigate to **Settings > Users & Teams > +Add Users**
2. Complete each of the fields listed below for the new agent.
   a. **Work Email Address**: Enter the work email address that corresponds to the email address used by the agent to login to the CRM.
   b. **First Name**: Enter the first name of the agent.
   c. **Last Name**: Enter the last name of the agent.
   d. **External ID**: (Optional) If you use an **external ID** system, enter the ID for reference when needed.
   e. **Location** of the agent: Used to dictate default language in the agent adapter and provides more clarity in monitoring and reporting.
   Note: To add locations, see Localized Languages in the agent adapter and User Location Entry.
   Note: Step E is required for agent adapter localization.
3. Select the checkboxes for the applicable **roles**.
   Note: If you're creating an admin or manager account but want that person to have access to the call or chat adapter, the agent role also needs to be assigned.
4. Set the agent's **Chat Concurrency setting**. Enter the maximum amount of chats the agent can handle at one time. This setting overrides the general setting in chat settings.

Note: For the purpose of this exercise, you can set the agent chat concurrency to 2.

5. **International Calling: Do not limit dialing to the restricted country codes**. Check this box to enable your global phone management settings' international calling configuration. *Note: For the purpose of this exercise, you can leave this box as-is.*

6. Click **Save**.