

Puzzel WFM 16-point process

The following section details the 16 point process that gives the quickest way to be up and running. This is only a recommendation and the process does not have to be done in this order.

Step 1

- [Create the campaign\(s\)](#)

Step 2

- [Create site\(s\)](#)

Step 3

- [Create Custom Activity Types](#)

Step 4

- [Creating Skills](#)
- [Creating Skill sets](#)

Step 5

- [Create Queues](#)

Step 6

- [Create users manually](#)

Step 7

- [Create Teams & Assign Supervisors](#)

Step 8

- [Import/Build Agents](#)

Step 9

- [Import Historical Information](#) (if required). *This needs to be done for each campaign.*

Step 10

- [Import Holiday/Vacation Allocation\(s\)](#). *This needs to be done for each campaign.*

Step 11

- [Create shifts](#)
- [Assign shifts to agents](#)

Step 12

- [Assign Skillsets to Agents](#)

Step 13

- Forecasting Module
 - [Calendar view](#)
 - [Creating a Forecast using the Wizard](#)
 - [Viewing Forecast](#)
 - [Editing Forecast](#)
 - [Copying Forecast](#)

Step 14

- [Create schedule](#)

Step 15

- [Campaign and date selection](#)
- Edit schedule, add activities
 - [Edit schedule](#)
 - [Adding activities to schedule](#)

Step 16

- [Publish the schedule](#)