# Genesys Engage cloud Workforce Management 8.5.1 Guide

## Forecast Templates List View

5/8/2025

# Forecast Templates List View

> ### Important
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workforce Management in Genesys Engage cloud.

Use the **Forecast Templates List** view to create, edit, and delete forecast templates.

You use these templates to create forecasts for sites or business units that have little or no historical data. In addition, there are other uses for templates.  For example, you can create templates for service objectives, such as Average Speed of Answer, and Service Level. In those  cases, forecast templates are used to apply different values for different periods of the day, instead of using a single value for the whole day.

The following sections cover:

- Displaying the Forecast Templates List view
- Using the Templates table
- Creating, editing, or deleting templates

## Displaying the Forecast Templates List View

1. In the **Modules** tree, click **Forecast > Templates** to activate the **Templates List View**.

2. In the **Objects** tree, select a business unit, site, or template. Business units and sites expand to display their templates.

   - If you selected a business unit or site, the table on the right-hand pane shows the templates that correspond to your selection.

   - If you selected a template, the template properties appear in the **Data** tab.

See Template Properties: Data, Template Properties: Activities, and Template Properties: Graph for information on the three template properties tabs.

## Using the Templates Table

The **Templates** table shows each template's name, type, associated site, and date range.

To filter the table so that it shows more or fewer templates:

- Select or clear check boxes in the **Show Template Types** pane at the top.

To select a template for editing or deletion:

- Click the template's row in the table.

## Creating, Editing, or Deleting Templates

You can use the following buttons on the **Actions** toolbar (these commands also appear in the **Actions** menu):

| | |
|---|---|
| **New** | Opens the New Forecast Template dialog box. |
| **Edit** | Opens the Forecast Template Properties view for the selected template. |
| **Delete** | Deletes the selected template after first displaying a dialog box asking you to confirm your choice. |