

Understanding Deskpro's Agent & User Permissions

Alesia Burvin - 2024-10-01 - Comments (0) - Configuration

Deskpro's permissions system provides fine control for admins over what agents and users can see and do on the helpdesk. This article outlines the various types of permissions available for both agents and users and how you can configure them.

Administrator Permissions

Administrator Access:

- Granting Administrator Access makes an agent an Admin in your helpdesk, giving them full access to the Admin interface and configuration settings.
- Admins can still have restricted access in the Agent interface based on their Ticket Permissions, as being given Admin Access does not automatically grant all agent-level permissions.

Reports Administrator Access:

- Agents with Reports Administrator Access can manage and use all Reports dashboards.
- This permission can be granted without giving the agent full Admin Access, allowing them to use reporting tools without accessing other helpdesk settings.

Billing Administrator Access:

- This permission allows an agent to access and manage billing settings.
- An agent must have Admin permissions to receive Billing Access, but not all Admins automatically have access to billing.

Agent Permissions

Ticket Permissions:

- Ticket Permissions dictate what actions an agent can take on tickets. To configure individual agent permissions, navigate to **Agents > Agent Profiles**, select the agent, and click on the **Permissions** tab.

Department Permissions:

- You can restrict an agent's access to tickets based on the ticket's department.
 - **Full permission:** Agents can view and work on tickets in the department.
 - **Assign permission:** Agents can assign tickets to a department but cannot view them afterward.

Notification Permissions:

- Control the notifications agents receive, including for tickets, Instant Messenger, tasks, Help Center updates, and account alerts.

Other Agent Permissions:

1. **People Permissions:** Control agent access to user and organization data within the Customer Relationship Management (CRM) system.
2. **Voice Permissions:** Determine which agents have access to the Voice channel.
3. **Publish Permissions:** Manage which agents can access and use the Publish app to publish content on the Help Center.
4. **Profile Permissions:** Set whether agents can manage their own profile pictures and signatures that appear on the Help Center and in replies to users.
5. **Task Permissions:** Define agent access to the Tasks app.
6. **Snippet Permissions:** Control agent ability to create, modify, or delete snippets for their own or others' use.

User Permissions

Ticket Permissions:

- Ticket Permissions control a user group's ability to create and reopen tickets.

Chat Permissions:

- These permissions allow you to decide if a user group can use the chat feature. Disabling chat for a user group will hide the chat widget on the Help Center for its members.

Help Center Permissions:

- Control user group access to Help Center components, including:
 - **Community Permissions:** Participation in community forums.

- **Publish Permissions:** Access to knowledgebase articles.
- **Guide Permissions:** Viewing of guides.
- **Downloads Permissions:** Access to files.
- **News Permissions:** Ability to read and engage with news articles.

User Department Permissions

User department permissions are set by user groups, enabling you to limit access to specific departments. For instance, you may want to allow only paying customers to access support, but grant everyone access to the sales department.