How do I make guides or knowledgebase articles only visible to agents?

James Godwin - 2023-08-24 - Comments (0) - Agent Permissions

Sometimes it can be very useful to create guide and knowledgebase content that offers information specifically for agents or individuals within your organization.

This often means you will want to restrict the regular users or customers from viewing this content, but not agents or individuals it is intended for.

This is achieved easily using Deskpro. To set up an agent-only section in the knowledgebase:

1. Go to Admin > CRM > User Groups, create an 'Agents' usergroup.
2. In the agent interface go to CRM > Agents. Go through your agents' user records and add them to the 'Agents' usergroup.
3. In the agent interface go to Help Center > Knowledgebase and add a new category. Set the permissions so that only members of the Agents usergroup can view it.

To set up an agent-only guide:

1. Go to Admin > CRM > User Groups, create an 'Agents' usergroup.
2. In the agent interface go to CRM > Agents. Go through your agents' user records and add them to the 'Agents' usergroup.
3. In the agent interface go to Help Center > Guides and add a new Guide. Set the permissions so that only members of the Agents usergroup can view it.