Add Agents to your Helpdesk

Lara Proud - 2023-08-31 - Comments (0) - Getting Started

Now that you have some departments in your helpdesk, you need to add some of your staff to the helpdesk as Agents.

Agents are accounts within Deskpro that can be used to interact with your helpdesk. Before adding individuals as Agents it’s a good idea to give them a heads up that they will be receiving an email notifying them of their new Deskpro account.

To add a new Agent to your helpdesk go to **Admin > Agents > Agent Profiles**. Click on the **+ New** button which will open a new Agent window where you can enter the account properties for the Agent you want to create.

Add: New Agent

Information | Permission | Department | Notifications

Profile Image

Upload Image | Delete

Name*

Display an alias to end-users

Email Address* + Add

Phone + Add

+44 Phone number

Teams (0 of 8 selected) Select All

- Support Team
- Sales
- IT Support
- HR team
- Customer Support Managers
- Complaints
- 2nd Line Support
- 221B Energy Support

Administrator Access

An administrator can use the admin interface to change helpdesk settings. Since an administrator can modify all settings including permission, they have complete access to everything in the system.

Reports Administrator Access

A reports administrator and view and manage all dashboards, including the ones they are not added to.

Permission Groups (0 of 6 selected) Show only selected

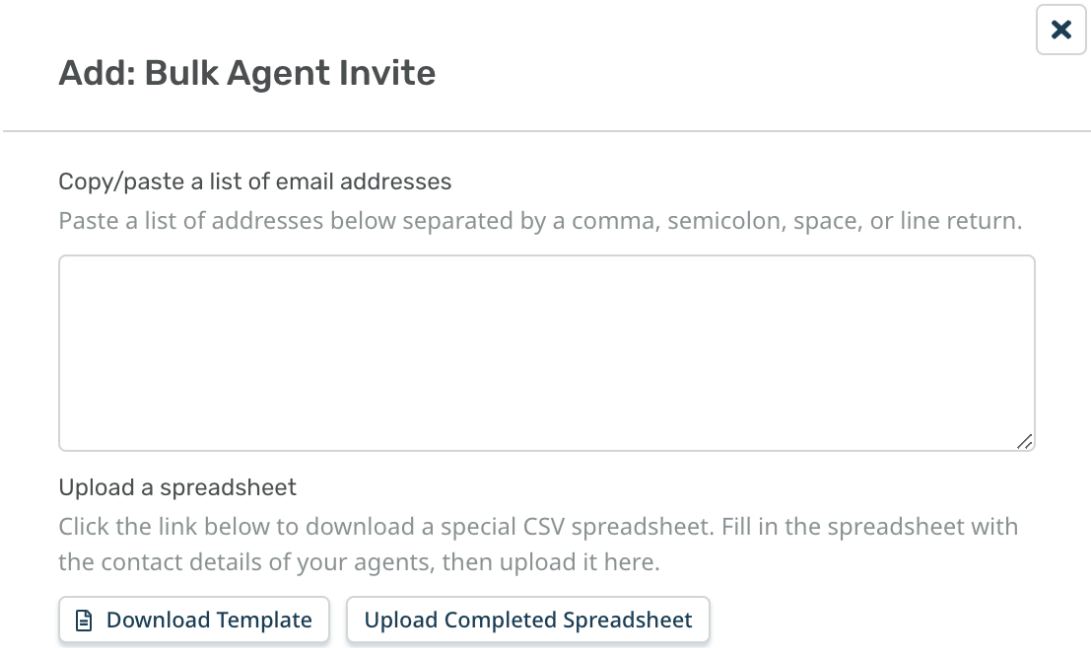
- All Permissions
- All Non-Destructive Permissions
- Customer Support Trainees
- Customer Support
- Customer Support Managers
- IT Support

Time Zone

Timezone

Create | Cancel

You can also **Bulk Add** Agents, you do this by clicking on the dropdown from the **+ New** button and selecting **Bulk Add**.



You can bulk add Agents by listing the email addresses of all the individuals you want to add as Agents or by importing them by uploading a CSV spreadsheet containing their information.

When you create a new Agent account for someone, they receive an email notification with their login details and a copy of our Agent Quickstart Guide.

By default, when an Agent is created they will have all Permissions enabled, this can be changed through their Agent Permission settings, for more information read Agent Permissions.

For more detail on creating and managing Agents refer to the Agents section of the Admin Guide.

Or read the next article in **Getting Started** on Linking your Communication Channels to your helpdesk.