Managing User Profiles

Profiles control the permission to what a user can do in Zoho Desk. For example, it defines if an agent can reply to tickets, assign a ticket to someone else, import records, create workflow rules, use customization features to make changes to the layout, etc. There are various such feature permissions that can be controlled with profiles assigned to users. In Zoho Desk, there are some default profiles available, some of which can be used as is, and some that can be edited. Additionally, you can always clone a profile to create one that addressed your requirement.

Default Profiles - These are system-defined and cannot be edited.

- **Support Administrator**: By default, admin profile users have access to all the features. However, they can also choose to enable and use only the specific options and functionalities they need within their profile permissions settings.
- **Agent**: This profile has limited access to the features.
- **Light Agents**: This profile has very limited set of permissions (such as read-only).

Custom Default Profiles - These are also system-defined, but you can edit them and change the permissions as needed. All these profiles have limited access.

- Newbie Agent
- Supervisor
- Support Manager

Note: By default, the users that you import will have the following: Role - Manager and Profile - Agent. After importing, you can change the roles and profiles from the Agents page.

Profile Permissions

Profile permissions are sorted under the following categories:
Module permissions
This section lists out the permissions for individual modules such as Tickets, Accounts, and Contacts. You can provide granular level access to modules that include view, create, edit, or delete records within the module.

Ticket permissions
The set of features mentioned under this category defines what actions users can perform within a ticket, such as sending email replies, closing a ticket, and changing ticket ownership.

Administrative permissions
As the name suggests, these are administrative features that control the ability to make significant changes to your help desk. It includes critical permissions such as managing agents and teams, configuring automation features, importing and exporting data, rebranding, and customizing fields and layouts.

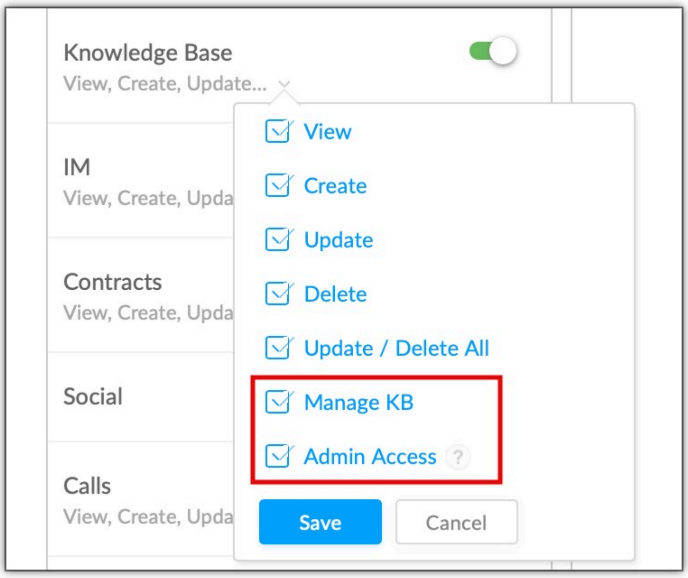
Multi-department permissions
These permissions are to assist in collaborating or accessing data across multiple departments created in your help desk. For example, users can create global reports, share and move tickets between departments, and access data across departments.

Module Permissions

- **Tab Visibility -** Control which modules should be visible to agents assigned to a particular profile. Disabling the tab visibility of a module means the agent will not be able to view that module in the product.
- **View Records** - Allow or disallow agents from viewing a particular record, such as tickets or contacts.
- **Create Records -** Allow or disallow agents from creating a particular record, such as tickets or contacts.
- **Update Records -** Allow or disallow agents from modifying a particular record.
- **Delete Records -** Allow or disallow agents from deleting a particular record, such as tickets or contacts.
- Update/Delete All Records - Allow or disallow agents from modifying or deleting all records.
- **Manage KB** - Enable users to manage the Knowledge Base within a department. When the **Manage KB** setting is checked, the agents can perform the following actions only in the departments they have been added to:
  - View, create, edit, and delete articles and categories
  - View articles in the recycle bin
  - View access settings
  - View sort articles section

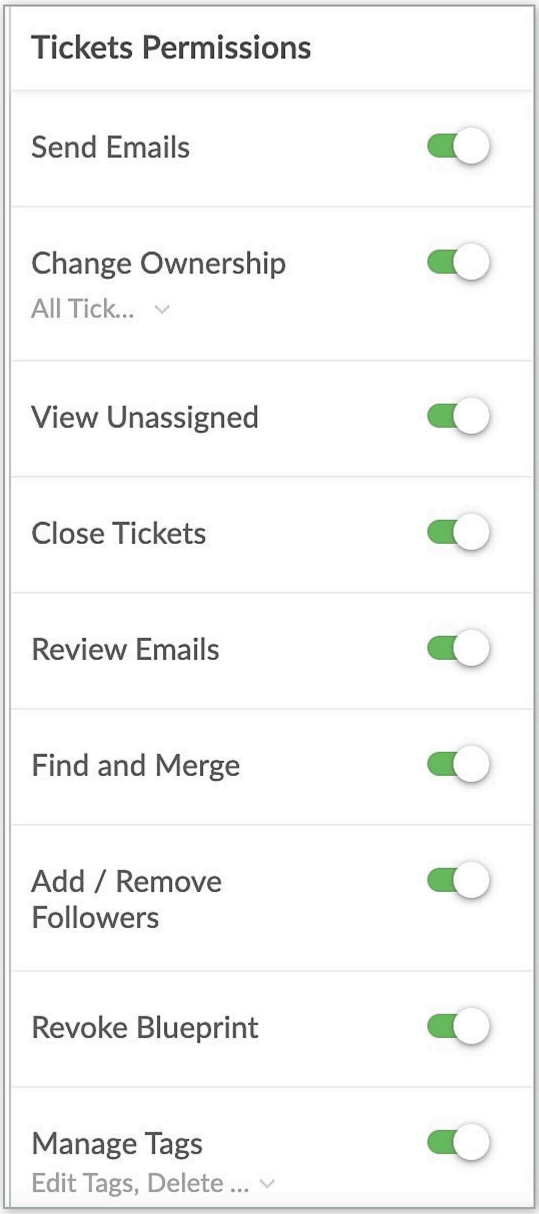
Note: The Organize Category option is not displayed for users who only have Manage KB permission.

- **Admin Access** - This setting allows users to access KB across departments. For example, the content director or head of the educational department could benefit from having a control over the knowledge base of all departments.   When the **Admin Access** permission is checked, the admins will be able to perform the following actions across the organization:
  - View, create, edit, organize, and delete articles and categories
  - Sort knowledge base articles
  - View, restore, and delete articles in the recycle bin
  - Enable or disable options in Access Settings



Ticket Permissions

- **Send Email -** For sending email replies to customer tickets.
- **Change Ownership -** For changing ownership of all tickets, only unassigned tickets or none.
- **View Unassigned -** For viewing unassigned tickets. When enabled, agents can view all the unassigned tickets and their own tickets.
- **Close Tickets -** For closing support tickets.
- **Review Emails -** For being reviewers who will approve email replies sent for review by other agents.
- **Find and Merge -** For merging up to three tickets into a single ticket.
- **Add Followers -** For adding followers to support tickets.
- **Add / Remove Followers -** For adding or removing followers to support tickets.
- **Revoke Blueprint**: For disassociating or revoke blueprint from tickets. Admins will have this permission enabled by default and they can enable this permission for other user profiles if required.
- **Manage Tags** - For managing tags in the ticket's detail view.



Administrative Permissions

- **Comment Permissions -** For editing or deleting agent comments. When disabled, agents cannot leave a comment on any record.
- **Manage Agents -** For managing your agents. You can choose whether they can view, add, update, and delete other users.
- **Manage Teams -** For adding and modifying your help desk teams.
- **Manage Permissions -** For administering permissions such as roles, profiles, and data-sharing rules.
- **Rebranding -** For rebranding your help desk, such as managing logo, host mapping domains, and handling multi-brand help centers.
- **Manage Modules -** For managing the various modules such as Tickets, Contacts, and Accounts. When enabled, agents can rename, select, and unselect modules.
- **Helpdesk Automation -** For managing the various automation functions such as Workflows, Blueprints, Macros, etc.
- **Manage Departments -** For adding, modifying, enabling, and disabling departments in your help desk.
- **Customer Happiness Ratings -** For managing the Customer Happiness feature under Setup.

- **Email and Ticket Templates -** For adding, editing, and deleting the email and ticket templates used in your help desk.
- **Administrator Dashboard -** For viewing the Headquarters dashboard with information of all the agents. When disabled, users can view only their data.
- **Agent Overview -** For viewing Overview, Tickets, Time Entry, and Happiness Rating information of other users on their profile page.
- **Manage Layouts and Fields -** For managing the layouts, fields, and ticket status under Setup.
- **End Users -** For performing actions such as inviting, re-inviting, activating, deactivating, editing, and deleting Help center users or your customers who access your help center.
- **Google Analytics Dashboard -** For accessing the Google Analytics' dashboard for Knowledge Base.
- **Approve End User Signups -** For acting as moderators who approve or deny end user signups in the help center.
- **Support Channels -** For managing the settings concerning support channels such as email, community, chat, and telephony.
- **Import Records -** For importing records into your help desk. You can even specify what records users are allowed to import.
- **Export Records -** For exporting records from your help desk. You can even specify what records users are allowed to export.
- **Manage General Settings -** For managing the general settings of tickets, contacts, and agents under Setup.
- **Multilingual** - For managing access to the multilingual setup page. By default, multilingual permission is enabled for the Administrator profile.
- **Manage Time Tracking** - For managing access to the time tracking setup page. By default, time tracking permission is enabled for the Administrator profile. With this permission, users can track time spent on tickets, each task, and billable time entries.
- **Webhooks -** For managing the webhooks created in your help desk. Note that this permission overrides module-level or department-specific permissions.
- **Gamescope -** For managing the gamification settings of the Gamescope feature under Setup.
- **Manage Privacy Settings -** For accessing and processing the Data Subject Requests and the option to enable read receipts.

Multi-department Permissions

- **Global Reports and Dashboards -** For creating reports that include metrics across multiple departments.
- **Access Data across Departments -** For accessing data across multiple departments.
- **Move Tickets -** For moving tickets between departments.
- **Share Tickets -** For sharing tickets with other departments in your help desk
- **Creating Profiles -** Any time you create a new profile, you need to close an existing one. After cloning, you can customize the profile permissions as required to create the new one.

To create a profile

1. Click the **Setup** > **User Management > Profiles.**
2. In the *Profiles* page, click **New Profile.**

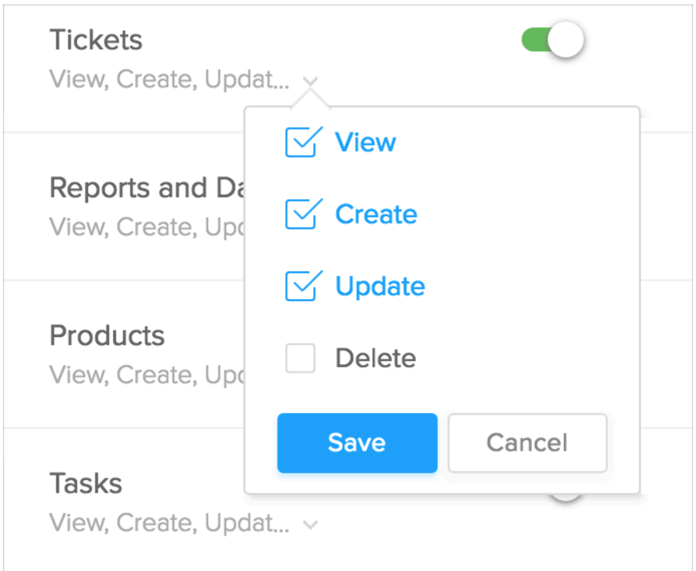
3. In the *New Profile* page, do the following:
4. Enter the *Profile Name*.
5. Select an existing profile from the **Clone Profile** drop-down list.
   This is the profile that will be cloned to create the new profile.
6. Specify the **Profile Description**.
7. Click **Save**.
   Once you have cloned the profile, you can make the changes to the various permissions.

Editing the Permissions

The Custom Default Profiles and the custom profiles that you clone can be edited to make changes to the permissions. For some, there are granular-level permissions as well. For example, for modules, you can separately control the permissions to view, create, edit or delete records. Another such example is for Manage Agents where you can control the permissions to view, add, update, or delete agents. By default, the users with the Support Administrator profile can manage these permissions. Additionally, users whose profile has the Manage Permissions option enabled can also make changes.

To edit permissions

1. Navigate to Setup > User Management > Profiles.
2. In the *Profiles* page, select the profile that you want to modify.
3. In the *Profile Information* page, specify the access permissions for the following:
   - Module Permissions
   - Ticket Permissions
   - Administrative Permissions
   - Multi-department Permissions



Associating Users with Profile

Every Desk user is associated with a profile and role. Users with the Support Administrator profile or any user with the Manage Agents (Add and Update) permission enabled can associate a profile for Desk users.

To associate users with a profile

1. Click the **Setup** > **User Management** > **Agents**.
2. In the *Agents* list page, hover over an agent's name and click (the **Edit** icon).
   Alternatively, you can click on the agent's name to view the details and then edit.
3. In the *Edit Agent Information* page under *Roles* select the default one or choose **Custom** to select the profile from the pick list field.
4. Click **Save.**

Deleting Profiles

When you have some unwanted profiles, make sure to check if they are associated with any user before planning to delete them. Users associated with the profile that will be deleted must be transferred to other existing profiles. Note, you can delete all the profiles except Support Administrator, Light Agent, and Agent profiles.

To delete a profile

1. Click the **Setup** > **User Management > Profiles.**
2. In the *Profiles* page, click (the **Delete** icon) for the specific profile.
3. In the *Delete Profile* page, transfer the existing users to the new profile.
4. Click **Transfer & Delete**.
   The profile will be permanently deleted.