Adding and Managing Agents

In an organization, customer support representatives play a major role as the point of contact for customers. Support reps, also known as agents in help desk software, form the customer-facing teams, who assist customers with billing, product issues and bugs, troubleshooting, refunds, and more. As the primary job role is to address customer's inquiries and issues, an agent's tasks involve:

- Replying to tickets and keeping track of them
- Offering live chat support or connecting with customers on social media platforms.
- Preparing a knowledge base of troubleshooting solutions for quick reference and a lot more

Inviting your team as agents in Zoho Desk with the right permissions and accessibility roles is the first step to onboard them to the help desk. Each agent is assigned a role and a profile. The role is based on the role hierarchy of the organization, which can be replicated in your Zoho Desk account. This defines the access to the data (records) in Desk. The profile, on the other hand, defines access to the features and what actions one can perform in the Desk account. **See Also** Managing Agent/User License

Permission Required

Users with the **Support Administrator** permission profile can access this feature.

Check Feature Availability and Limits

Ideally, a help desk will require an administrator to manage the account, customize it, configure the automations, create the required role and profile, and invite other agents. For this, there is the Support Administrator profile available by default. Next is the majority of any Support department, the agents, who provide customer support and services. For them, the Agents profile fits best with all the permissions to reply to tickets, manage them, provide support via chat and social media, access the knowledge base, and so on. Similarly, you can have more profiles that can be assigned to the agents.

Note

- Each user license can be used to add one active user/active agent to your Desk account. Inactive users are not counted for the user licenses that you have.
- Whenever you delete a user, the user license subscription will not be canceled and you will be billed for it. You can add another agent in place of the deleted one, if required, or unsubscribe the user license if you do not wish to use it.
- Refer to this document to know more about purchasing user or agent license.

Adding an Agent

As an administrator, you should add the other agents who are part of the customer service team. The total number of agents that can be added to an account depends on the Zoho Desk subscription that you have. **See Also**
Managing Agent Licenses
When agents are invited to Zoho Desk, they will receive an email to accept the invitation within seven days. If the user did not click the invitation link in the email within seven days, the Administrator can re-invite them.

To add an agent to your help desk

1. Navigate to **Setup** > **User Management** > **Agents**.
2. In the *Agent List* page, click **New Agent**.
   You can also click the Add icon next to Agents in the menu.
3. In the **New Agent** page:
   a. Enter the **First Name**, **Last Name**, and the official **Email Address**.
      The email address mentioned here will be used to log in to Zoho Desk.
   b. Select the **Departments** to which the agent needs access.
      This option is available only when you have created more than one department. The department you are currently using will be selected by default.
   c. Under *Role and Permission*, choose the **Profile** (Agent, Admin, Light Agent) or select *Custom* to select a role and a profile that you created.
      When you select **Agent**, you must also specify their access rights for tickets. Select one of the following options:
      - Access all tickets
      - Their tickets and unassigned tickets
      - Access own, team, and unassigned tickets
   d. Select the agent's expertise in **Channel Expert** field.
      You can choose from options such as Phone, Chat, Twitter, Email, and so on.
   e. Enter additional information about the agent, the agent's **Phone number**, **Extension** and **Mobile** number, if needed.
   f. Click **New Agent**.
      The agent will be added to Zoho Desk and an email invitation will be sent to the agent's email

address. The agent must accept the invitation by clicking the Access link in the email within seven days of receiving it.

Important Steps on Accepting Invite

- If the user is new to Zoho and does not have a Zoho account:
    1. After clicking the access link in the invitation email, user will be redirected to the Sign Up page
    2. The user will sign up and create an account with Zoho
    3. Upon creating the account, the user should click the Continue signing in button
    4. The user must confirm the email address by accessing the link sent in the confirmation email
- If the user already has an account with Zoho but does not have a Zoho Desk account:
    1. After clicking the access link in the invitation email, the user should click the **Continue signing in** button.
    2. The user will be logged in to the Zoho Desk account that is associated with their company.

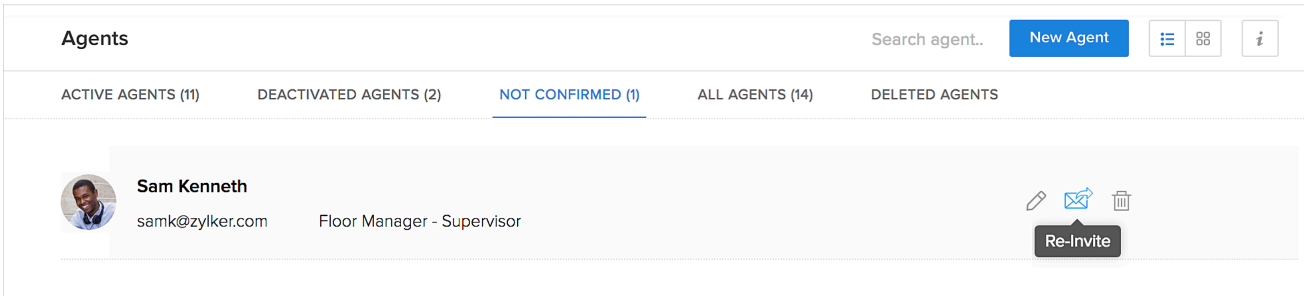
> **Note**
> Agents can only specify other details like language, county locale, and time zone during the sign up.

Re-inviting Agents

The invited user needs to accept the invite within seven days. If the user does not click the link in the email invite by then, the Administrator will need to re-invite the user. These users who accepted the invitation to join the Zoho Desk account will be listed as 'Not Confirmed'.
You can send an invite again to the unconfirmed users. Please note that re-inviting a user is different from activating an inactive agent.

To re-invite a user

1. Click the **Setup** > **User Management** > **Agents**.
2. In the *Agent List* page, switch to the **Not Confirmed** users' view.
3. Hover your mouse and click (the **Re-invite** icon) corresponding to the agent.
   An invitation email will be sent to the user's email address.



Adding a Light Agent

One of the default profiles in Zoho Desk is light agent. This profile has restricted permissions; users with this profile cannot edit the fields in the tickets and therefore cannot reply to it or assign the ticket to any other agent. However, light agents can assist your full-time agents by adding private comments to any ticket in the department they belong to. Such private comments are strictly internal, and your end-users cannot view them.

For example, light agents could be the software developers or the finance team members. These light agents empower your team to come together and collaborate effectively over the customer support process. Your developers can share their expertise on tickets about a bug in your software, similarly; your finance team can advise agents about the status of payment before shipping a product.

Note

- You cannot add light agents in the **Free** edition.
- Light agents are available as an **add-on** for an extra price in all the paid editions.
- You can add up to **50** light agents for free on the Enterprise edition.
- Light agents are charged on a per-license basis on the **Zoho One edition**.

Light Agents Can:

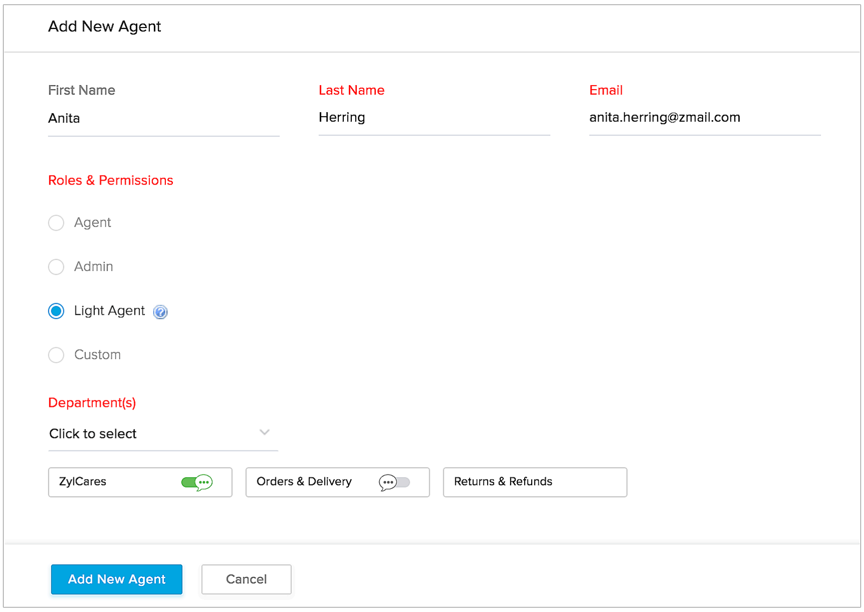
- View Tickets, Accounts, Contact, Articles, Activities, Reports, and Dashboards
- View Company, Products, Personal Settings (except Signature), and Support Contract under Setup
- Leave private comments in Tickets, Contacts, Accounts, Activities, and Articles
- View and customize their profile information
- Export module data using the Import/Export functionality under Setup
- View all Custom Views and create a view that is visible only to them
- Receive alerts through automation and on the escalation of tickets

Light Agents Cannot:

- Add, edit or delete records under any module. Module refers to the Tickets, Accounts, Contacts, etc.
- Leave public comments in Tickets, Contacts, Accounts, Activities, and Articles
- View the Community tab
- Merge, split or move tickets between departments
- View and create Global Reports
- Have tickets assigned to themselves or added to Teams

To add a light agent

1. Navigate to **Setup** > **User Management**> **Agents**.

2. In the *Agent List* page, click **New Agent**.
   You can also click the plus icon alongside the Agents menu.
3. In the *New Agent* page, do the following:
   a. Enter the **First Name**, **Last Name**, and the **Email** address
   b. Select **Light Agent** under *Roles & Permissions*
   

   c. Select the **Department** they should belong to.
   Once you assign a department, the agent can access and view only those tickets that belong to that department. This option is only available when you have created more than one department
   d. Enter additional information like **Channel Expertise**, **Bio**, **Desk Phone**, and **Cell Phone**
   e. Click **Add New Agent**.
   The agent will receive an email invitation to their email address provided by the administrator. The agent must accept the invitation by clicking the Access link in the email within seven days of receiving it.

Deleting and Deactivating Agents

Deleting and deactivating an agent are two different actions with two different results. Ideally, you should delete an agent from your Zoho Desk account if the person has left your organization, so you can use the user license to add another agent to your account. However, if you've hired temporary or seasonal agents, or agents on contract, or have agents leave on sabbatical, you might have to revoke their access temporarily for a certain period of time and provide them access later. In these cases, you can deactivate and activate these agents as required.

In both cases, the agent's access to Zoho Desk is revoked. **Note that the user license is not cancelled; you will be billed for the number of user licenses that you have purchased.**

In short, deactivate an agent if you want them to be activated later, and delete an agent if they leave your company permanently. Once deleted, you cannot restore an agent's account.
If you want to cancel your user license, please refer to [Manage User Licenses](#).

Since users are an important part of your Zoho Desk account, deleting or deactivating affects other features as well.

Below are important points to consider before revoking access from users.

Modules

Agents usually have tickets assigned to them and are the record owners of records in modules such as Accounts, Contacts, Products, etc. While deleting an agent, you will have the option to change the ownership of these records to a new agent, or in case of tickets, to mark them as unassigned. Additionally, if the agent has created a list view that is private and inaccessible to other agents, then the view will also be deleted.

If the agent is only deactivated, the list views will remain private and will not be deleted from the Desk account. If the list view is shared with other agents, upon deactivating the user, those agents will still be able to access the list view.

Automations

Features like the round-robin and direct assignment rules, workflow rules, notify agents option, and so on are affected when an associated user is deleted. During deletion, you will have the option to assign another agent or leave them unassigned for the affected features. Based on your selection, the following places may be updated:

- The assign to field will be updated in round-robin and direct assignment rules.
- If the field update option is enabled for workflow rules, macro, and supervise features, the ticket owner fields will be updated.
- In the notify agents field, the new agent will be replaced. Note that the agent's email will not be replaced if it's used in the additional recipients section.
- In the SLA escalations, the field update > ticket owner condition used to trigger SLAs and the agent selected under the whom to escalate field will be updated.
- The agent to whom a task is assigned in workflow rules will be updated.

Note that custom functions used with any connections created by the deleted/deactivated agent will no longer work. You'll need to edit and re-authenticate the connections or create a new connection for the custom function.

Integrations in Zoho Desk

When an agent who sets up an integration or extension is deactivated, the agent's access is revoked and the configured integration will not work. A user with administrative privileges needs to re-authorize the integration.

Analytics - Reports and Dashboard

When an agent creates reports in a folder that is not shared with other agents (visible to "only me"), upon deactivation or user deletion, the reports will not be accessible to anyone else. If the user is deleted, the reports will be deleted as well. The same is true of dashboards and scheduled reports.

Community and Help Center

The Community and Help Center modules are not affected by agent deletion or deactivation. In the Community module, all the agent's activity will remain as it is. In the Knowledge Base module, any articles and categories created by agent will be accessible to other agents and administrators.

For webforms, the feedback widget, and the ASAP plugin, when the agent who created the form/widget gets deactivated, the primary contact will be assigned as the contact owner and ticket assignee. Similarly, in Help

Center, there won't be any data loss and the primary contact will be assigned as the owner if the person who created the entity is deactivated.

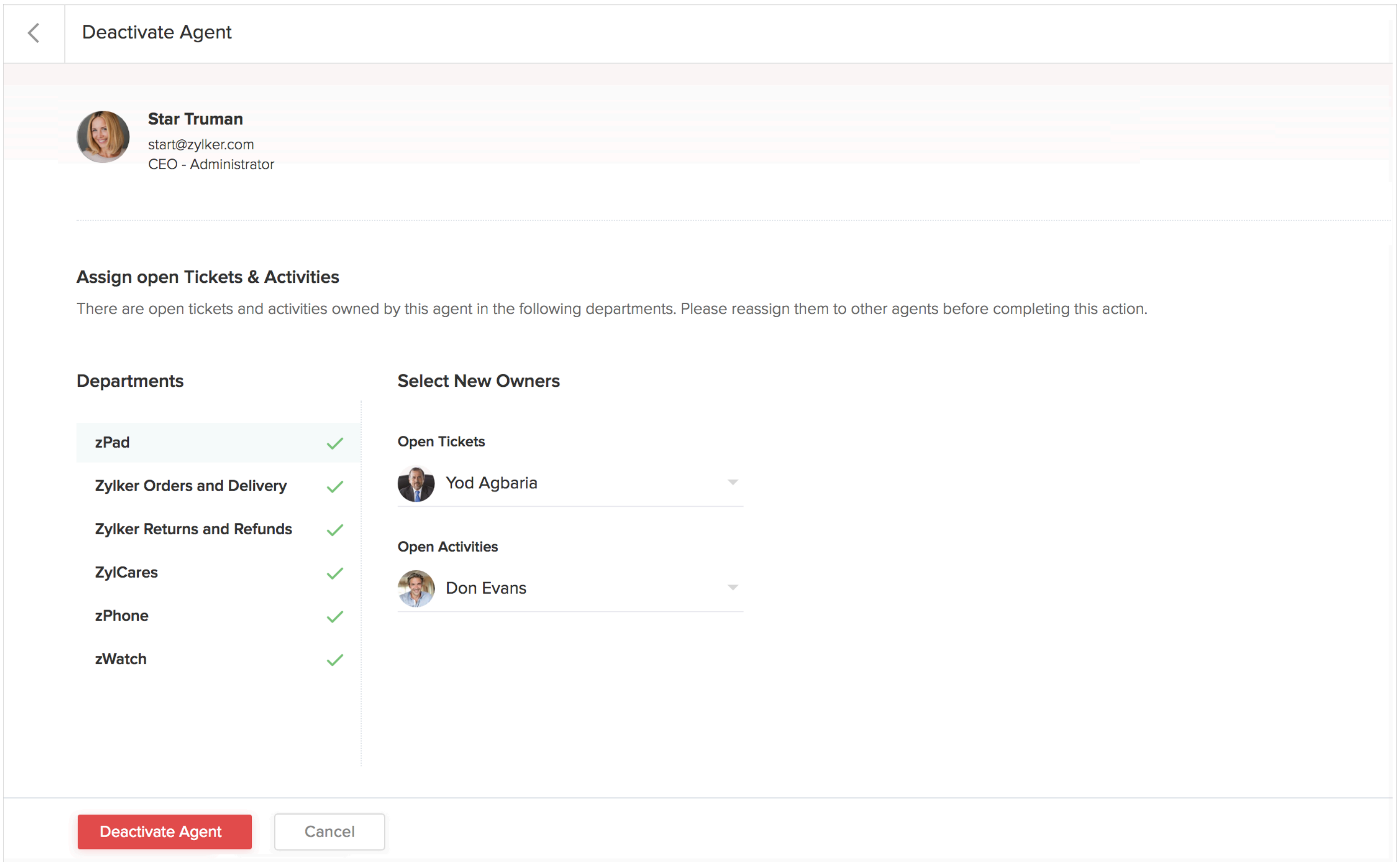
Deactivating agents

Please note the following points when you deactivate an agent:

- After deactivating, no one will be able to log in to the service using the deactivated ID.
- The agent license is not canceled. You'll be billed for the number of licenses that you've purchased.
- You're free to use the same user license to add another agent.
- The agent will be listed in the Deactivated Agents list.

To deactivate an agent

1. Click **Setup** > **User Management** > **Agents** .
2. On the *Agent List* page, make sure you are viewing the **Active Agents** view.
3. Hover your mouse over and click the deactivate icon ( ) that corresponds to the appropriate agent.
4. Click **Deactivate Agent** on the following screen.



5. For an agent assigned to open tickets or activities, continue with the following:
   - Use the drop-down boxes to **specify** the agents who will take over the tickets and activities. You may need to do this for each department the agent belongs to.
   - Click **Deactivate Agent** .
6. Click **Yes, I understand. Deactivate Now** to confirm the deactivation.
   Similarly, you can activate an agent who was deactivated previously from the Deactivated Agents view.

Please note that only active agents are counted towards user licenses.

Deleting an agent

When you delete an agent, the user is only archived and not removed to maintain the information of records they handled in the past—e.g., tickets, activities, etc. This way, any tickets or activities the deleted agent closed will continue to have the agent's name.

Before you delete an agent, you should make sure that the rest of your team will handle any tickets or activities that were previously owned by that agent. The agent themselves can reassign their own tickets before they prepare to leave, but if that isn't done, you can reassign them in bulk while deleting the agent. You can see a list of all deleted agents under the Deleted Agents tab under Agents settings page. Plus, you can anonymize deleted agents from here. Note that the tab shows only the deleted agents and not those who were anonymized.

Note

- You cannot delete the following users from Zoho Desk:
  - Yourself
  - Primary Contact or the Super Administrator
  - Any sole agent in a department
  - Agents who have set up Zoho Cliq, Live Chat, or Twilio integrations
- A deleted agent will no longer count towards your agent limit. However, you will still be charged for the subscribed number of license seats until you downgrade them.
- The automation rules used to assign tickets and tasks to a deleted agent will henceforth assign them to the agents specified during deletion.
- Integrations saved using the account of a deleted agent may not work as expected. You will find these integrations listed on the agent deletion page.
- You cannot restore a deleted agent. However, you can add them back as a new agent with the same email address.

To delete an agent

1. Click **Setup** > **User Management** > **Agents.**
2. On the *Agent List* page, make sure you are viewing the **Active Agents** view.
3. Hover your mouse over and click the delete icon () that corresponds to the appropriate agent.
4. Click **Delete Agent** to confirm.
   For an agent assigned with open tickets or activities, continue with the following:
5. Use the drop-down list to **specify** the agents who will take over the tickets and activities.
   You may need to do this for each department the agent belongs to.
6. Click **Delete Agent**.
7. Click **Yes, I understand. Delete Now** to confirm the deletion.
   The agent will be moved over to the *Deleted Agents* tab.

Anonymizing and deleting an agent

You can anonymize the personal data of agents when you delete them.

What is the "anonymize agent" option?

We've provided agent anonymization to support the "right to be forgotten" as outlined in the General Data Protection Regulation (GDPR) for data subjects who reside in the European Union. When you anonymize an agent, their personal information is erased such that it's no longer identifiable. The full name, email addresses, phone numbers, bio, and so on are permanently erased. You can also enter a nickname to identify the agent you are anonymizing. The nickname appears in place of the agent's original name. If a nickname is not entered, the name will be "Anonymous Agent."

> **Note**
> You can anonymize agents only at the time of or after deleting an agent.

How thorough is anonymization?

Anonymized agents will have their references removed from across the product. For example, tickets and activities they handled will display "Anonymous Agent" as the agent's name. Also, their full name, email addresses, phone numbers, photo, bio, and so on are permanently erased. You can anonymize agent data across Zoho Desk to comply with the GDPR's "right to be forgotten" without having to delete tickets, activities, or other personal information.

When you anonymize an agent:

Zoho Desk scrubs their data from ticket fields, comments, mentions, history logs, and so on.

The name of the agent is replaced with "Anonymous Agent," But you can choose a one-time personal nickname to be associated with the anonymized agent.

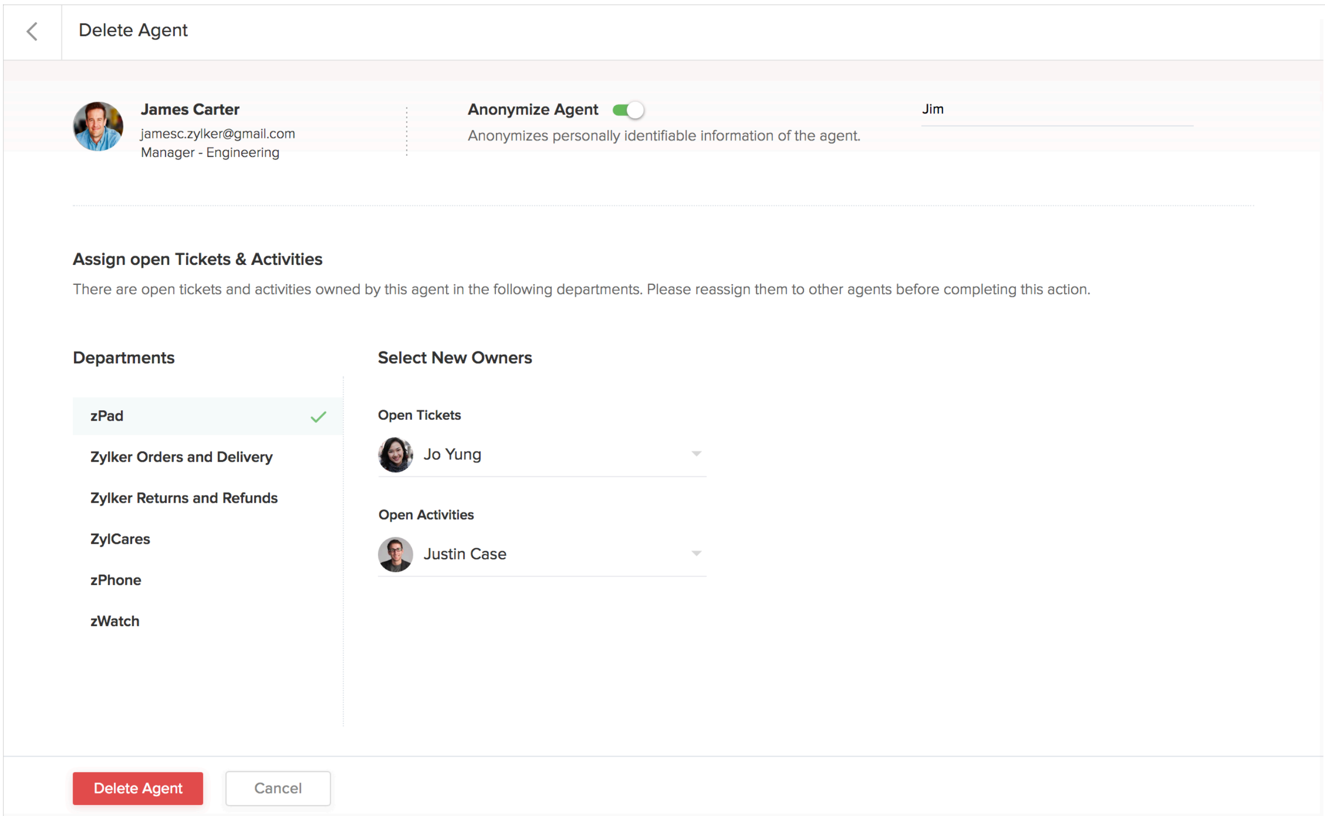
To anonymize an agent

1. Click **Setup** > **User Management** > **Agents.**
2. On the *Agent List* page, select the **Deleted Agents** view.
3. Hover your mouse pointer over and turn on the Anonymize toggle that corresponds to the appropriate agent.
4. On the confirmation screen, enter the **Anonymous Name** for the agent.
   This name is optional.
5. Click **Anonymize Agent.**
   The agent will be anonymized immediately.

> **Note**
>
> - You can only anonymize deleted agents, though you can anonymize and delete agents at the same time.
> - Once anonymized, the agent information cannot be retrieved again because the agent has been deleted.
> - Anonymous agents are not listed under the Deleted Agents tab or anywhere in Desk.

To anonymize and delete an agent

1. Click **Setup** > **User Management** > **Agents.**
2. On the *Agent List* page, make sure you are viewing the **Active Agents** view.
3. Hover your mouse over and click the delete icon ( ) that corresponds to the appropriate agent.



4. On the next screen, do the following:
    a. Enable the **Anonymize Agen** t toggle option.
    b. Enter the **Anonymous Name** for the agent.
       This is a one-time step to add a nickname and is optional. This nick name will be replaced in the community posts when the agent is deleted and anonymized.
    c. **Reassign** any open tickets or activities that the agent owns.
    d. Click **Delete Agent** .
5. Click **Yes, I understand. Delete Now** to confirm.

SEE ALSO

[Managing User Licenses]

[Adding and Managing Teams]