NOMAD SMALL BUSINESS SUITE

Service Desk Free - Service Desk Agent Role Guide

A focused guide for the single all-access Free role, including login restrictions, complete desk operation, user creation, resource linking and access review.

Edition: 0.2.3
Audience: Service Desk Agents and the administrators who provision them

Contents

This guide is based on the verified product package and is written as an operational reference. Use the online version for navigation and this PDF for offline access.

1. Role purpose and access boundary

The Service Desk Agent operates the complete Free desk. It is suitable only for trusted staff who need all tickets, operational data, configuration, AI, billing and Service Desk user management.

Who should receive this access

Use this role for a trusted person who is responsible for the complete Free Service Desk. Free does not provide narrower internal roles, so do not assign it to a person who should see only assigned tickets or read-only reports.

What this role can see

- All tickets and complete ticket histories
- All customers and requester details
- All resources and assignments
- Internal notes, time, sign-off and Service Desk events
- Analytics, billing batches and Accounting links
- All Service Desk settings and AI resources/settings
- All Service Desk users

What this role can do

- Create, edit, assign, reply to and delete tickets
- Manage customers and resources
- Log time and capture sign-off
- Generate billing batches and Accounting invoices when configured
- Configure inbound email, integrations and embedded AI
- Create additional Service Desk Agent users

What this role cannot do

- Use a narrower Free internal role because none exists
- Treat customer portal users as internal agents
- Access unrelated WordPress administration unless the account is also a WordPress Administrator
- Bypass business approval merely because the role has technical access

2. Sign-in, navigation and account setup

Start with the correct named account and confirm that the visible workspace matches the assigned access.

First sign-in

1. Use the login/set-password message or the approved login URL.
2. Sign in with the named account.
3. Confirm the browser lands on Support Desk > Dashboard.
4. Confirm Support Desk is the only available WordPress administration area.
5. Open a controlled ticket and verify complete Service Desk access.
6. Report any unexpected unrelated WordPress menu immediately.

Navigation

Area	Availability or purpose
Dashboard	Complete desk overview
Tickets / Add Ticket	All ticket work
Customers / Resources	Full record management
Analytics / Billing	Operational and financial support controls
Users	Create restricted Service Desk Agent accounts
Settings / AI	Complete configuration and knowledge management

Account and resource relationship

Every Service Desk Agent is linked to an active support resource. The account may work through the full administration screens and may also use the assigned-resource portal. WordPress Administrators inherit the same Service Desk capabilities but remain unrestricted across WordPress.

3. Creating and maintaining Service Desk users

Provision the narrowest appropriate access and verify the result before handing over the account.

Create a Service Desk Agent

1. Open Support Desk > Users.
2. Enter username, email and optional first/last name.
3. Enter a password or leave it blank for secure generation.
4. Choose whether to send the login/set-password email.
5. Create the user and verify the Active support resource result.
6. Test login and Support Desk-only access.

Offboard an Agent

1. Reassign active tickets.
2. Preserve historical replies, time and sign-off.
3. Deactivate the resource where required.
4. Disable the WordPress login under the account policy.
5. Review access from any shared device or stored session.

4. Daily operating routine

Use a consistent routine so ownership, communication and audit records remain current.

Start of day or session

- Review urgent, high and unassigned work
- Check customer replies and inbound failures
- Confirm resource availability and assignments
- Review failed AI, CRM or Accounting events where applicable

During the day

- Maintain status and ownership
- Separate public replies from internal notes
- Log time after each work block
- Verify AI suggestions before saving
- Protect customer and commercial information

End of day or session

- Hand over urgent unfinished work
- Review Pending and Waiting tickets
- Confirm time and billing readiness
- Clear device-local drafts and sign out of shared devices

5. Primary workflow

Operate each ticket through triage, assignment, communication, work, time, sign-off and commercial review.

Complete ticket procedure

1. Confirm customer, impact, priority and duplicate status.
2. Assign the support owner and resources.
3. Read the full conversation and internal history.
4. Perform or coordinate the approved work.
5. Send the customer-visible update and add internal evidence separately.
6. Log time and select billable status correctly.
7. Set the lifecycle status and next owner.
8. Complete sign-off, billing and closure controls where required.

Decision and quality rules

- The next-action owner determines the status
- Internal notes never replace a required customer update
- Ticket deletion is exceptional; normal completed work is Closed
- Financial actions require business approval even though the role can perform them
- Free Agent access is not appropriate for read-only or assigned-only staff

6. Communication, notes and records

Create records that another authorised person can understand without relying on memory or a separate email.

Record standards

Record	Required content
Public reply	Confirmed result, next action, owner and customer request
Internal note	Evidence, completed checks, remaining action, risk and handover
Time entry	Actual minutes, work outcome, billable choice and resource
Sign-off	Correct ticket, signer review and saved evidence
Billing batch	Reviewed customer, time scope, amount and destination invoice

Visibility rules

Content	This role's access or responsibility
Customer-visible content	Agent controls and verifies it before saving
Internal notes/files	Fully visible; never copy publicly without review
Rates and billing	Visible and manageable
AI settings/resources	Visible and manageable
Other WordPress areas	Blocked for non-administrator Agent accounts

Information protection

- Never store passwords, tokens or unnecessary private information in tickets
- Use exact customer matching and controlled domains
- Review recipients before sending
- Mask sensitive evidence before escalation
- Follow retention and deletion policy

7. Handover and escalation

Escalate work with enough verified context for the next authorised role to act safely.

Escalate when

- Customer or financial authority is required
- An integration response is uncertain
- A privacy/access issue is suspected
- A platform change needs WordPress or hosting administration
- The role's all-access nature is inappropriate for a user

Handover procedure

1. Record the current ticket state and verified evidence.
2. List completed actions and results.
3. State the exact next action and owner.
4. Record customer expectation and timing.
5. Identify any privacy, billing or availability risk.
6. Confirm the new owner can access the ticket.

Escalation evidence

- Ticket number and customer
- Page/action and timestamp
- Exact message or outcome
- Relevant non-secret IDs or logs
- Current versions and user role

8. Access problems and recovery

Identify expected restrictions before treating them as faults.

Access troubleshooting

Problem	Check or action
No Support Desk menu	Confirm the account has Service Desk Agent role and sign in again
Redirect from wp-admin page	Expected when the page is unrelated to Support Desk
New user has no resource	Confirm creation succeeded and the role is Service Desk Agent
Login email missing	Check WordPress mail logs; use an approved password-reset process
Pro roles disappeared	Expected when Pro is inactive; Free consolidates to Service Desk Agent

Do not bypass the role model

- Do not grant WordPress Administrator merely to fix a Service Desk configuration issue
- Do not add direct per-user Service Desk capabilities
- Do not edit role data in the database
- Do not share a single Agent account

9. Quick reference and review

Use this checklist during onboarding, supervision and periodic access review.

Role checklist

- Named account
- Service Desk Agent role
- Active resource link
- Support Desk-only menu
- Complete Service Desk access
- Tested mail/password process
- Documented offboarding owner

Periodic review

1. List all Service Desk Agents.
2. Confirm each still needs complete access.
3. Review current assignments and recent activity.
4. Disable unnecessary accounts and reassign work.
5. Retest login/menu restrictions after updates.

Related master documentation

- Service Desk Free Implementation Guide
- Service Desk Free Detailed User Guide
- Customer / Requester Portal Guide