

Getting Started on Deskpro

[Getting Started](#) - [تعليقات \(.\)](#) - Eloise Rea - 2025-07-30

Welcome to Deskpro! Whether you're starting fresh or migrating from another platform, this guide will walk you through everything you need to set up Deskpro, customize it to match your brand, and get your team onboard.

☐ !Let's get started

Departments: The Foundation of Your Helpdesk .1

?What are Departments

Departments are the main organizational units in your helpdesk. They represent internal divisions within your organization and serve as the foundation for managing tickets. Every ticket must be assigned to a department.

:Each department has its own settings, including

- **Permissions** to control agent and user access
- **Contact forms** tailored to different customer needs or to record information internally

How to Add Departments ☐

Go to **Admin > Ticket Structure > Departments** •

By default, you'll see **Sales** and **Support** •

Click **Edit** to customize or **+ Add** to create new departments •

.For more information, check out our [Departments Guide](#)

Invite Your Team .2

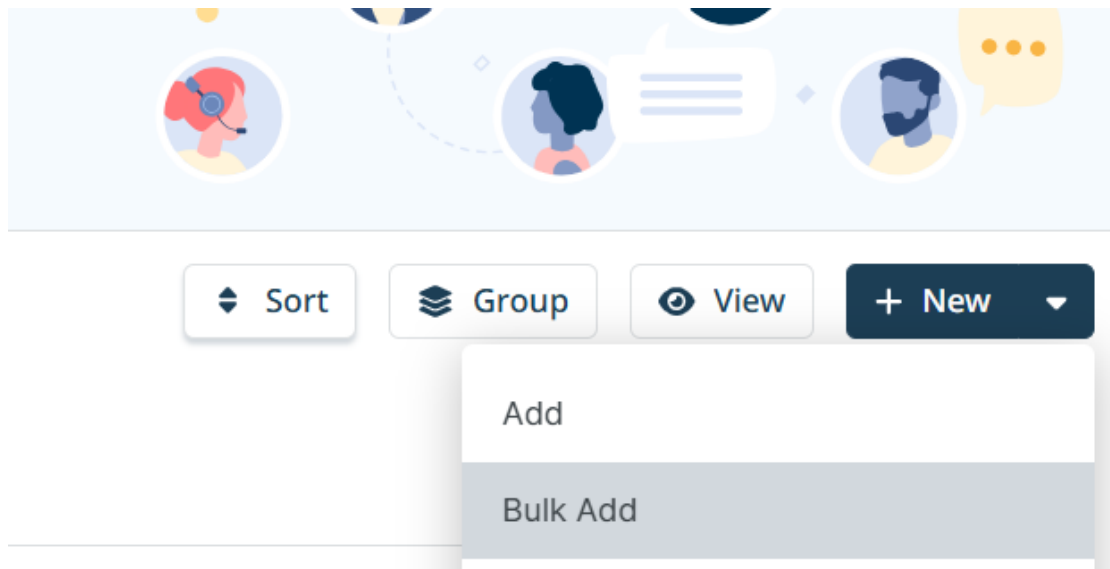
.Once you've set up your departments, it's time to define who will be working on your helpdesk

• **Agents** are individuals who handle tickets within Deskpro

• **Teams** group agents by expertise or function (e.g., Tier 1 Support, Payroll, Complaints, Support Managers)

.To add agents, go to **Admin > Agents > Agent Profiles**, click **+ New**, and enter the agent's account details

Need to add multiple agents at once? Use the **Bulk Add** feature under the **+ New** button to streamline the process.



Create Teams

.Navigate to **Admin > Agents > Teams**, click **Add Team**, name the team, select agents, and save your changes

Set Permissions

Permissions define what each agent can see and do in Deskpro. You can assign permissions individually or through permission groups

:Deskpro includes two default permission groups


All Permissions: Full access to all settings and actions •

Non-Destructive: Allows agents to view and respond to tickets without making critical changes or deletions •

Learn more here: [Permission Groups](#)


Connect Your Support Channels .3

Deskpro supports multiple channels so you can connect with your customers wherever they are. Below, you'll find guides to help you set up each channel you'd like to enable

.[Set Up a Custom Email](#) - Send and receive emails from your own branded address  •


.[Custom Fields & Forms](#) - Collect the exact information you need with tailored fields and forms  •

.[Voice Setup Guide](#) - Enable full call center capabilities for phone support  •

.[Deskpro Messenger](#) - Build chatflows, add automation, and integrate AI for next-level live chat  •

.[Instagram](#) - Manage direct messages and respond to comments without leaving Deskpro  •

.[Facebook](#) - Connect your page to reply to messages and engage with comments seamlessly  •

.[WhatsApp](#) - Make it easy for customers to reach you via their favorite messaging app  •

Automate Your Helpdesk .4

Automation saves you time and ensures a consistent experience for your customers. Deskpro offers several types of automation

Learn More	Example	Description	Automation Type
Guide to Triggers	Send an auto-response when a new ticket is created	Automatically perform actions based on ticket events	Triggers
Escalation Guide	Notify a manager if a ticket hasn't received a reply in 24 hours	Automatically perform actions based on time spent in a status	Escalations
SLA Guide	Set a 1st Response target of 1 hour for the support department	Define target response and resolution time	Service Level Agreements (SLA)
AI Guide	Generate instant AI summaries of tickets or power your Deskpro Messenger chatbot with AI to answer initial questions	Use Deskpro AI features to boost productivity and speed up resolutions	AI

To Learn more about triggers, watch our short video here

Make It Yours: Branding & Customization .5

Why Customize

Branding helps you build trust with customers by ensuring your helpdesk looks and feels like your company

Update Your Branding

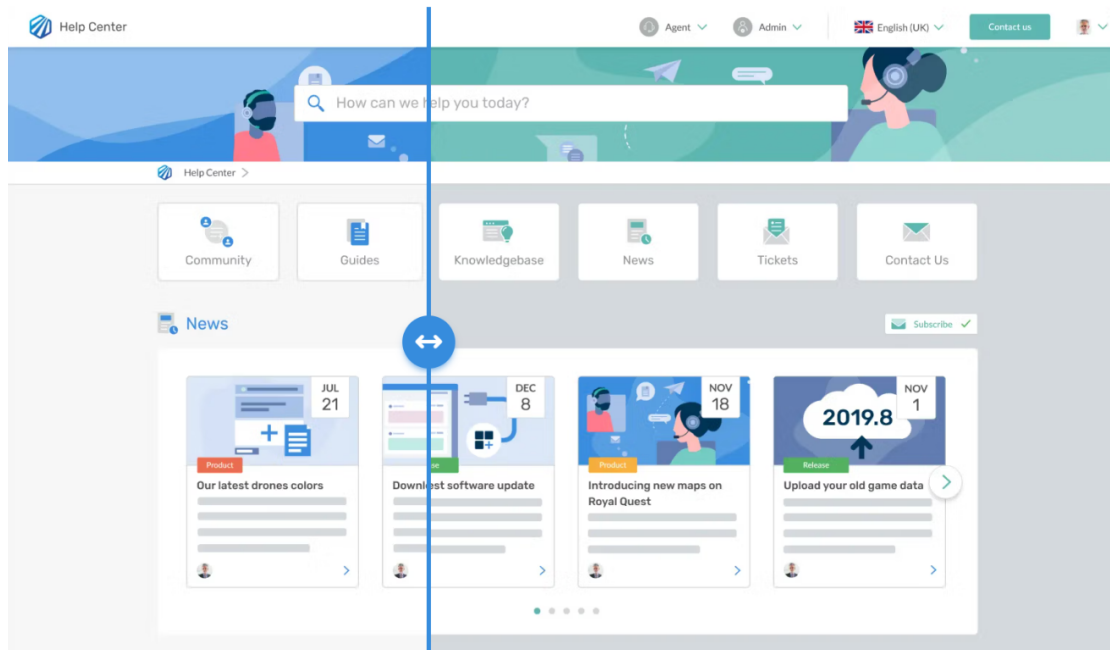
Go to **Admin > Configuration > Branding** to upload your logo, set your helpdesk name, and configure your external-facing help center

You can also customize email templates to ensure your branding, fonts, and footers are included in every email you send

[Custom Email Template Guide](#)

Help Center Customization

You can manage the appearance of your Help Center under **Admin > Help Center > Help Center Design**. Here you can change your welcome message, adjust fonts and colors, and add your logo to create a help center that reflects your brand



.For more details, see the [Help Center Design Guide](#)

Add Integrations & AI .6

.Extend Deskpro's capabilities with apps and AI-powered tools

[Setting up AI](#) ☐ •

[Explore our Apps](#) ☐ •

Import Your Data .7

?Need to import users or organizations ☐

.You can use [Deskpro's CSV Importer](#) to upload tickets, users, and organizations in CSV format

?Need to import all of your ticket data including attachments ☐

We've partnered with **Helpdesk Migration**, a powerful external tool that simplifies and streamlines the transfer .process from all major helpdesk providers

..?For more information, see [Can I import data from other systems or helpdesks](#)

Next Steps ☐

:Help your team get up to speed quickly with these resources

[Agent Guide](#) - Detailed information on how to use the Agent Interface ☐ •

[Admin Guide](#) - Complete guide to configuring all features within Deskpro ☐ •

[On Premise Controller Guide](#) - Going with a self-hosted installation? This guide covers all you need to ☐ •
..know

[Product Tour Videos](#) - Short introduction videos to different areas ☐ •

[!Contact Support](#) - We're always happy to help ☐ •

Congratulations! Your helpdesk is now set up and ready to go. We encourage you to keep exploring ☐
.Deskpro's features to get the most from your helpdesk

.If you have any questions or need assistance, visit our [Help Center](#) or [contact us](#) for support