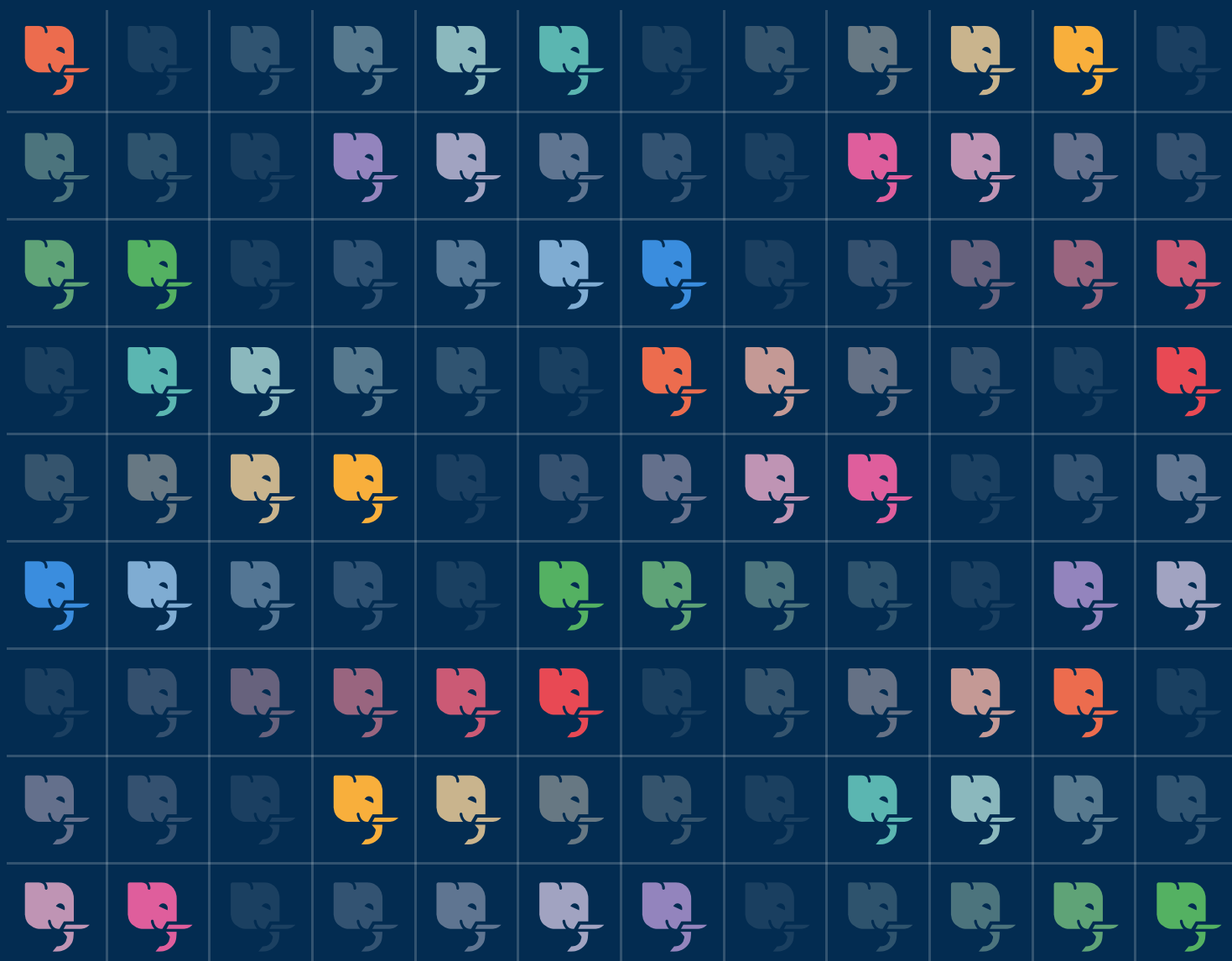


Admin Quickstart Guide

Follow along with our simple steps to get your helpdesk up and running.



WELCOME TO DESKPRO

Setting up your new helpdesk

This guide will show you how to get your new helpdesk up and running in 5 easy steps.

You can also take a look at our [Agent Quickstart Guide](#) for more information about the interface and how you and your agents will be using Deskpro day-to-day.

Take a Look at your New Helpdesk

Familiarize yourself with your new Deskpro helpdesk, these are the different parts of the interface you will access when using, managing, and configuring the helpdesk.

The image shows a screenshot of the Deskpro helpdesk interface with several callout boxes pointing to different parts of the UI:

- Navigation Bar**: Easily switch between helpdesk components.
- Workspaces**: Switch seamlessly between Deskpro instances.
- Global Apps**: Search, Notifications, Agent IM, Bookmarks, Feedback, Scratchpad, and Latest Updates.
- Navigation Panel**: Access and filter your view of content across the helpdesk.
- View Panel**: Easily switch between different views for better visibility and content management.
- Content Panel**: View and work on individual items such as tickets or articles.
- Voice and Chat Apps**: Manage your status for chat and voice.
- Agent Profile**: View and manage your preferences.
- User and Organization Profile**: Get context instantly and easily navigate between user and organization profiles.

1 Organize your helpdesk into Departments

Departments are the main organizational structure in your helpdesk.

You can use them to represent internal divisions within your organization, for example, different departments or regions.

1 To add Departments, go to **Admin > Ticket Structure > Departments**. There are already Sales and Support departments that you can edit or delete.

2 Click the **+ New** Department button, add a new department title, and click **Save**.

Add: New ticket department

id: 111232

InformationPermissionsFormWebsite Embed

Title*

☐ Display an alias to end-users

Department avatar

Pick IconUpload Image

Parent

None

By setting a parent department, this department becomes a child. This is just an organizational feature that helps you create department structures that are easier to use.

Brands

☐ Brand 1☐ Brand 2

New Ticket Trigger

When a new ticket is submitted through the Help Center in this department:

Then

the following actions will run:

☒

Set email account

support@221b-energy.com

+

Ticket Changed Trigger

When a ticket department is changed to this department:

Then

the following actions will run:

Top tip!

You can add as many Departments as you want. For each department you can customize the permissions and contact form with custom fields!



2 Add your Agents

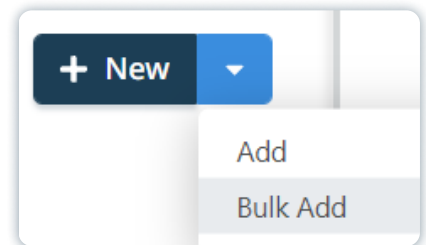
Using Deskpro works best when you get others involved, so let's add your co-workers to Deskpro as Agents.

They will receive an email notifying them of their new Deskpro login details and also our Agent Quickstart Guide to get them up to speed ASAP.

1 Go to **Admin > Agents > Agent Profiles**.

2 Add individuals using **+ New** or bulk add agents to quickly add your whole team!

3 You can restrict an Agent's access by clicking on their **Permissions tab**. For Department permissions, click on the **Departments tab**.



Information **Permission** Department Notifications

Permission groups are pre-defined sets of permissions you can easily apply to multiple agents. Select the permission groups to apply to this agent:

Permissions Groups (1 of 6 selected) Select All

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

Ticket People Chat Voice Help Center Others

Ticket Permissions Toggle All

Can use the ticket system	<input checked="" type="checkbox"/>
Can create new tickets	<input checked="" type="checkbox"/>
Can mass-reply to tickets	<input checked="" type="checkbox"/>
Can unarchive tickets	<input checked="" type="checkbox"/>
Can create new ticket labels	<input checked="" type="checkbox"/>

Q

	Own	Unassigned	Followed	Assigned
Can view tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Can reply to tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Can modify tickets ▼	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



Top tip!

Agents will be created with no access or permissions so remember to set some basic permissions!

3 Link your Communication Channels

Users can interact with your organization and create tickets in several ways with Deskpro, the main channels are Email, Live Chat, Forms, Voice, Social Media, and Reviews.

Email

Users can submit tickets by sending a message to an email account linked to your helpdesk.

Note

The process of setting up email accounts on Deskpro varies whether you have a **Cloud or On-Premise** deployment, refer to the email set up instructions relevant to your helpdesk.

Cloud Accounts

1 To add linked email accounts, go to **Admin > Channels > Email > Accounts** and click the **+ New Email** button.

2 If you want to add an existing email address like **contact@yourdomain.com**, check **Use a custom email address** and enter the relevant email account details.

NOTE: You need to forward emails from your account to the Deskpro address.

Edit: contact@hannahnewtest1310.deskpro.com

Email Address*

@hannahnewtest1310.deskpro.com

Enter the main Deskpro email address for this account

☒ Enabled ?

☐ Use a custom email address

☐ Add custom email aliases

Brands

Enabled on all brands

New Ticket Trigger

When a user submits a new ticket by emailing this address:

☒ Set brand

Default

☐

☐

☒ Set department

Support

☐

☐

On-Premise Accounts

- 1 To add linked email accounts, go to **Admin > Channels > Email > Accounts** and click the **+ New Email** button.
- 2 You can set your custom email address e.g. support@yourcompany.com
- 3 Leave Type as Ticket Email Account.
- 4 Select email account type (IMAP, POP3, Gmail/Google Apps or MS Exchange, Office365) and enter the Account Details.
- 5 Specify how to send outgoing mail, then click Test Account Settings.

Add: New Email Address

Email Address*

☐ This account has additional email addresses associated with it (aliases)

☒ Enabled ⓘ

Brands

Enabled on all brands

Type

Ticket Email Account

Ticket accounts are email accounts that Deskpro will download emails from and process into tickets and replies.

Account Details

Account Type

Gmail or Google Apps

Email Address

Enter email address above

Authentication method

Manual

Password

Test Account Settings

Advanced Options

☐ Enabled Encryption and Signing (S/MIME)

Ticket accounts are email accounts that Deskpro will download emails from and process into tickets and replies.

New Ticket Trigger

When a user submits a new ticket by emailing this address:

<input checked="" type="checkbox"/>	Set brand	221B Energy		
<input checked="" type="checkbox"/>	Set department	Customer Support		



Top tip!

Set the Department for tickets received to the email address with New Ticket Trigger.

Live Chat

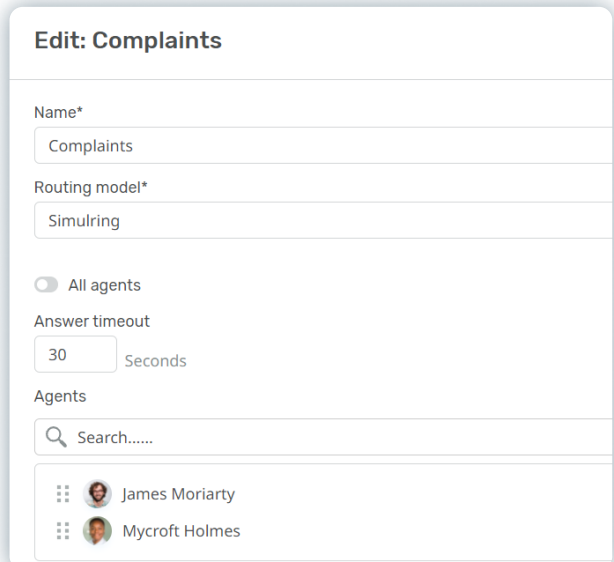
The quickest and easiest way to assist your Users at the moment is by using a Live Chat. Customize the messenger widget to your brand and embed it anywhere on your website.

- 1 Go to **Admin > Channels > Chat > Departments** to manage Chat Departments & Agent Permissions.

- 2 Setting up Chat Queues allows communications to be shared evenly and managed automatically.
Admin > Channels > Chat > Queues

Note

We'll cover embedding the chat widget later on in this guide!



Edit: Complaints

Name*
Complaints

Routing model*
Simulring

☐ All agents

Answer timeout
30 Seconds

Agents
Search.....

- James Moriarty
- Mycroft Holmes

Forms

You can create custom, dynamic forms that contain the specific information you need from Users to help your Agents with context. Route specific questions to departments and agents.

- 1 Responsive dynamic forms are created using Custom Form Layouts at **Admin > Ticket Structure > Departments > 'Select a department' > Form.**

- 2 Use the **+ Field** button to add custom fields to the form.

Top tip!

You can make custom fields in **Admin > Ticket Structure > Ticket Fields.**



[Information](#) [Permissions](#) **[Form](#)** [Website Embed](#)

Form

Default Form Editor ▼

This default layout is being used by no other departments.

[User Form](#) [Agent Form](#)

⋮ User Name & Email (Single-line Text)

⋮ Department (Select Field)

⋮ Subject (Single-line Text)

⋮ Business Area (Select Field)

⋮ Joiner Name (Single-line Text)

⋮ Any further comments you wish to add? (Multi-line Text)

⋮ Message & Attachments (Multi-line Text)

+ Field

3 Contact Forms automatically appear on your Help Center, click on the Contact Us tab.

4 To put a form anywhere on your website, select **Website Embed** and automatically generate the embed code you need!

Voice

You can have a fully-integrated call center solution built directly into your helpdesk to receive inbound calls and make outbound calls.

1 To enable voice Admin > Channels > Voice and follow the steps to add credit.

2 Once enabled; you'll be able to purchase a number, add queues and build an auto-attendant.

You can learn more about Setting up Voice in our [Voice Guide](#).

4 Automate your Helpdesk

You can automate routine and mundane tasks. Triggers, Escalations and SLAs run in response to ticket events, and can perform almost any action an agent can do manually.

AUTOMATION	EVENT	ACTION
Trigger Ticket	> Subject contains 'Booking'	> Assign to Sales team
Escalation	> No reply from user in 7 days	> Send auto follow-up email
SLA	> If ticket not replied to in 1 hour	> Increase urgency to 4

To explore this powerful feature, let's set up a Trigger that assigns a ticket to the Sales team when a ticket subject contains 'Booking.'

1 Go to Admin > Business Rules > Triggers > + New

2 Give the Trigger a title, such as "Ticket containing Booking."

3 Set the event as 'New Ticket'

4 In Criteria, add when Email Subject - Contains - 'Booking'

5 In Actions, add Set Assigned Team - Sales. Click Save.

Add: New Ticket Trigger

1 Properties

Title*
Ticket Containing Booking
This title will be used throughout the admin interface to refer to this Trigger.
☒ Enabled

2 Event

Event
New ticket
☒ By User

☒ Help Centre ☒ Website Widget ☒ API
☒ Ticket Form Widget ☒ Email ☒ Phone
☒ Messenger
☐ By Agent

3 Criteria

The criteria section is a list of terms that must match before the actions are applied to the Ticket.

When the following conditions are met:

Email subject contains booking

4 Actions

These actions will apply when all of the criteria pass.

Then the following actions will run:

Set assigned team Sales

Top tip!

Try submitting a ticket through email with Booking in the subject to see the trigger in action! You can see even more examples in our **Guide!**

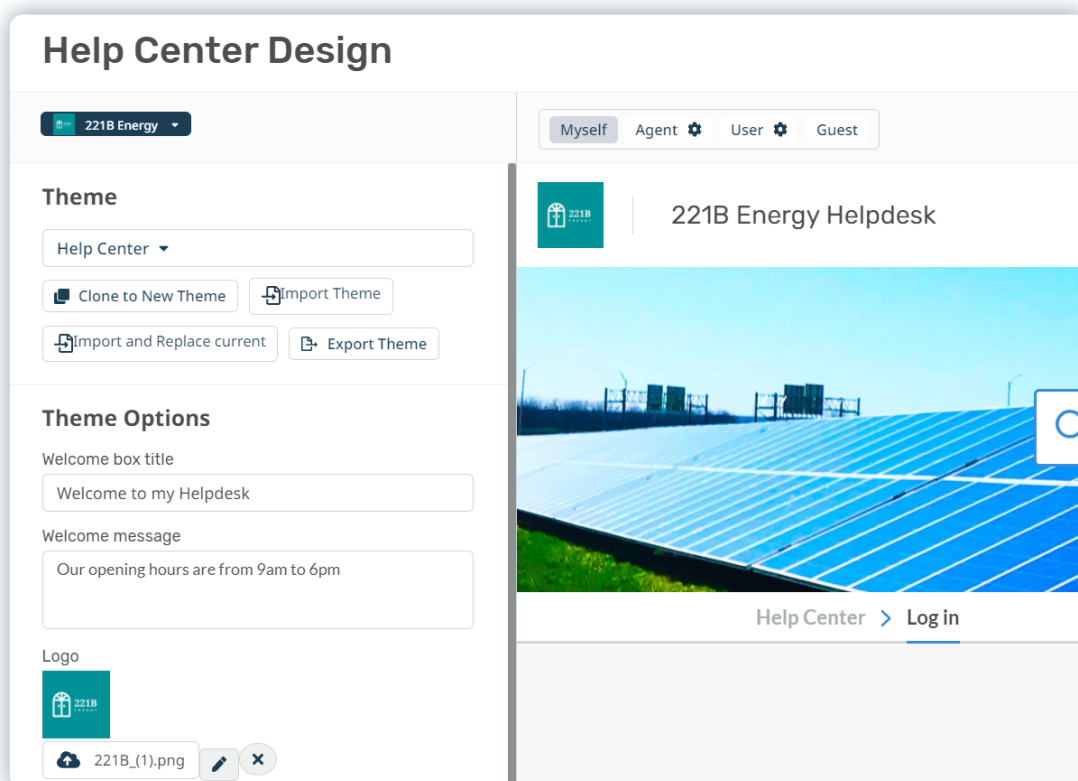


5 Personalize your Help Center and Content

Help Center

Your Help Center is where users are able to interact with a whole range of support services that Deskpro enables you to offer, such as knowledgebase articles, community forums and contact forms.

- 1 Making basic changes to Help Center is easy. Go to **Admin > Help Center > Help Center Design**. Align the Help Center with your brand by adding your logo, brand colors & setting a welcome message.



- 2 Your Help Center can be found at your-account.deskpro.com. To add a custom domain, like support.yourdomain.com, go to **Admin > Configuration > Branding > 'Select your Brand' > Help Center URL**. You'll need to be able to change the DNS record for your domain.

- 3 You and your Agents can create useful content - like knowledgebase articles - for your Help Center in the Publish app. Take a look at our comprehensive guide for more information.

Embedded Widgets

Embedded widgets allow users to chat with agents and submit tickets directly from your website.

- 1 Access the Messenger widget, in **Admin > Channels > Chat > Messenger Setup**
- 2 Customize the look and behavior of your widget to fit your needs.
- 3 When you're happy, go to **Add Messenger to Your Site** to get the code snippet and set the allowed domains

Top tip!

When there aren't any agents available for live chat, the widget displays your Ticket Form for users to submit a ticket.



> Next Steps

Well done. Your helpdesk is starting to take shape!

If you have any questions about using Deskpro, please visit our support center at support.deskpro.com, where you can find a complete Admin guide and an extensive library of articles and videos. You can also contact us directly at support@deskpro.com.

Good luck, and thank you for choosing Deskpro.

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