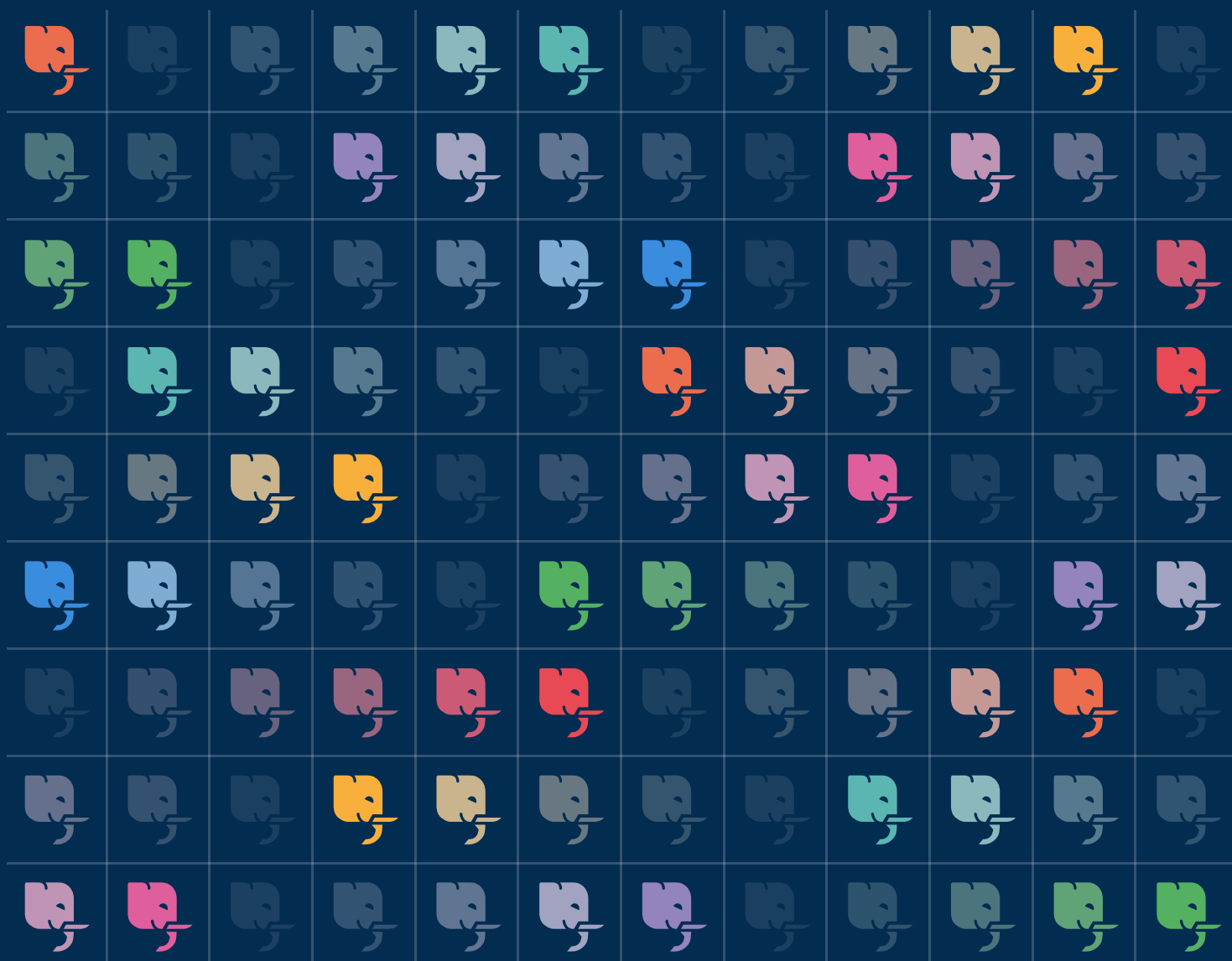


Agent Quickstart Guide

Learn about all the different tools and components in your new helpdesk



Welcome to Deskpro

Deskpro is a helpdesk platform designed to help you deliver great support and communicate with your users with ease.

When users contact your organization through any of your connected channels, a ticket is created. All information and communication about the enquiry will then be captured in that ticket until it is resolved.

Deskpro includes other components, such as Live Chat, Community, CRM, Tasks and Help Center.

Navigating the Agent Interface

The Deskpro Agent interface has five main sections. Depending on the helpdesk component you're using, they might look slightly different, but the basic functionality is the same.

The image shows a screenshot of the Deskpro Agent Interface with five numbered callouts pointing to different sections:

- 1. Navigation Bar**: Points to the left sidebar containing various navigation options like Tickets, Queues, and My Inbox.
- 2. Navigation Bar**: Points to the bottom navigation bar showing the current agent's status and available apps.
- 3. View Panel**: Points to the top section of the main workspace, which displays ticket details and agent information.
- 4. Content Panel**: Points to the central area where the ticket conversation history is displayed, including messages and agent notes.
- 5. User & Organization Profile**: Points to the right sidebar, which contains the user's profile, contact information, and organization details.

Additional callouts include:

- Workspaces**: Points to the top bar area above the View Panel.
- Global Apps**: Points to the top right corner, listing Search, Notifications, Agent IM, Bookmarks, Feedback, Scratchpad, and Latest Updates.
- Agent Settings**: Points to the bottom left corner, where agents can manage their status for Chat and Voice.
- Voice and Chat Apps**: Points to the bottom left corner, where agents can manage their status for Chat and Voice.

Agent Settings

From your Agent Settings, you can update your profile and set your account preferences, such as:

- Your profile image
- Language
- Signature
- Security settings, such as resetting your password
- Notifications

Top tip!

Setting a signature will save you time when replying to tickets by automatically appending your signature whenever you send a reply.



Preferences

Profile Security Preferences Notifications

Profile

Profile Image Name*
Sherlock Holmes

☐ Display an alias to end users

Contact Information +

Email
sherlock.holmes@test.com

☐ Send email notifications with plaintext parts

Language & Locale

Timezone: UTC Language: English

Signature

This signature will be appended automatically when you send ticket replies

Paragraph B I U S A </>

Kind regards,
Sherlock

Global Search

The global search functionality helps you to quickly locate specific content in the helpdesk.

The search results are clearly organized and separated by the type of helpdesk content; such as tickets, CRM, tasks, Knowledgebase articles.

Search

boiler

Filter Sort: Date updated

Users (1)

Boris Smith
<boris.boilers@gmail.com>
Account Notes: **Boiler** technician sub-contractor

Articles (1)

How to Install a **Boiler** 1 yr

News (1)

What does the gas **boiler** ban mean for me and ... 7 mos

Community Topics (1)

What is the most environmentally friendly **boil...** 7 mos

Suggestions and New Ideas! [Open Discussion](#)

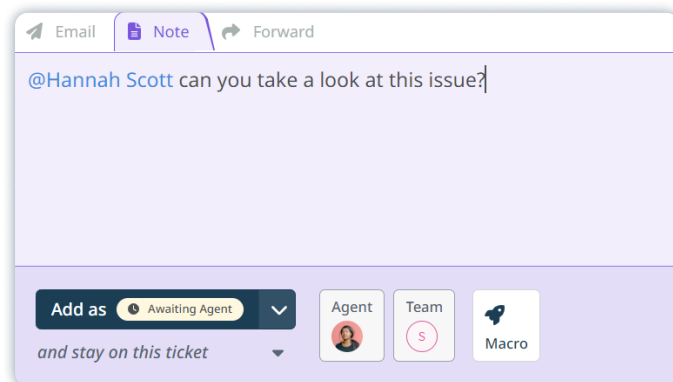
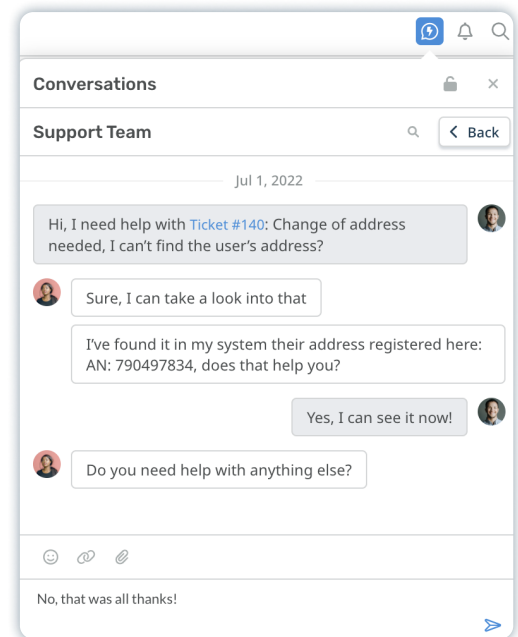
Agent IM

Chat with other agents, teams and departments in your helpdesk.

Agent IM lets you have 1-on-1 conversations with other agents, group conversations across different teams and departments, and broadcast mass messages across the entire helpdesk with ease.

Top tip!

Agent IM is a great way to communicate with other agents and reduces the need for reliance on professional third party messaging apps.



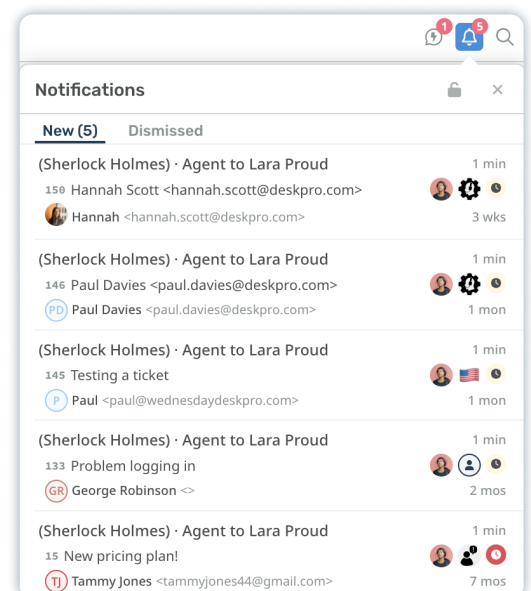
You can also initiate an Agent IM through the @mention feature. Tag another Agent in an agent note; then they will be notified in the IM app.

Notifications

Your notifications display in the application panel, with a number indicating how many notifications you have.

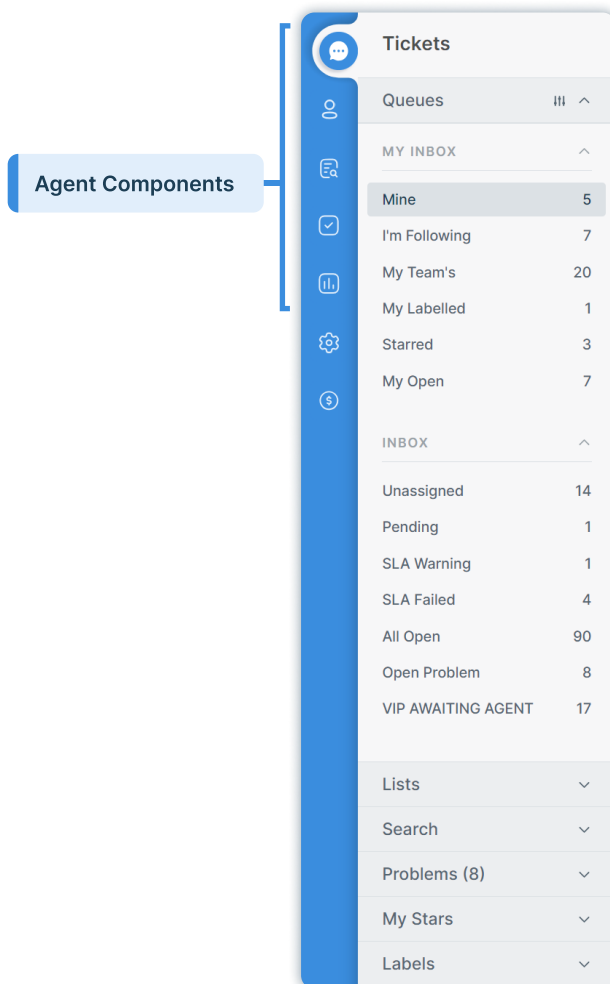
Top tip!

You can also change your notification settings from your agent profile.



Tickets

You will probably spend most of your time in the helpdesk in the Ticket interface resolving user queries. In this interface you'll use the Navigation and View panels to find and group the tickets that require your attention.



1. & 2. Navigation Bar & Panel

The **Navigation Bar** lets you move between the Deskpro Components; Tickets, CRM, Help Center, Tasks, and Reporting.

The **Navigation Panel** lets you filter items based on specific criteria.

Here is a summary of the different Ticketing Features:

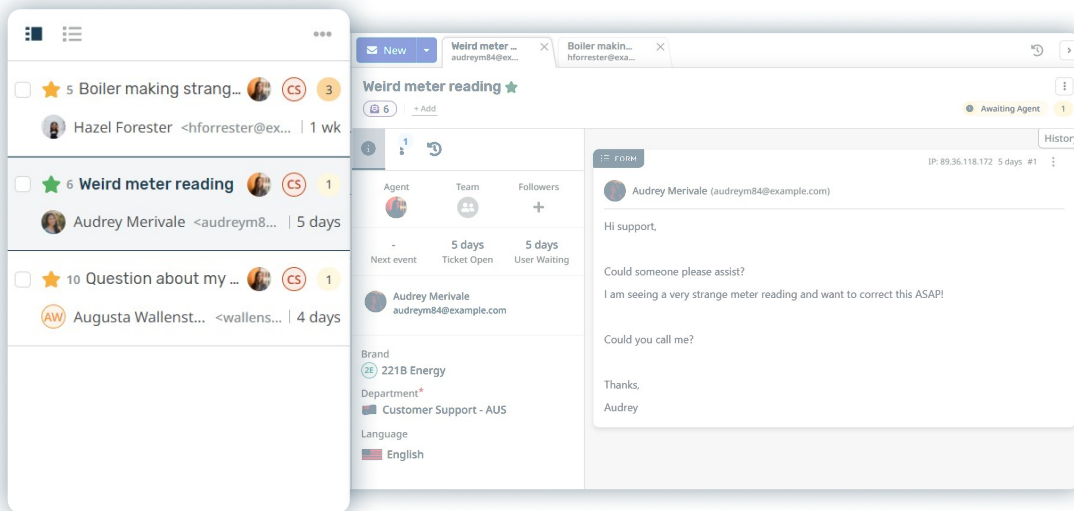
- **Queues**
View the tickets that matter to you, by easily navigating through the queues.
- **Searches**
Locate specific tickets by searching against ticket content with keywords.
- **Lists**
Generate highly specific lists of tickets that match unique criteria.
- **Problems**
Group incoming tickets based on specific ongoing incidents.
- **My Stars**
Categorize your own tickets in the agent interface by applying stars.
- **Labels**
Global labels can be used to categorize tickets across the helpdesk.

3. View Panel

The ticket View Panel gives two viewing options for tickets;

■ Card View

Card View lets you look at a queue of tickets whilst keeping the content panel open, allowing you to work on tickets or publish content at the same time.



Order, Group and Edit View

Manage and filter the tickets being displayed.

Refresh Button

Open Options

Open the actions bar to order and manage tickets.

Mass Actions

Apply actions to multiple tickets at once.

Status & Urgency

Assigned Department

The department that the ticket is submitted to.

User

The user who submitted the ticket.

Assigned Agent

The agent that owns the ticket.

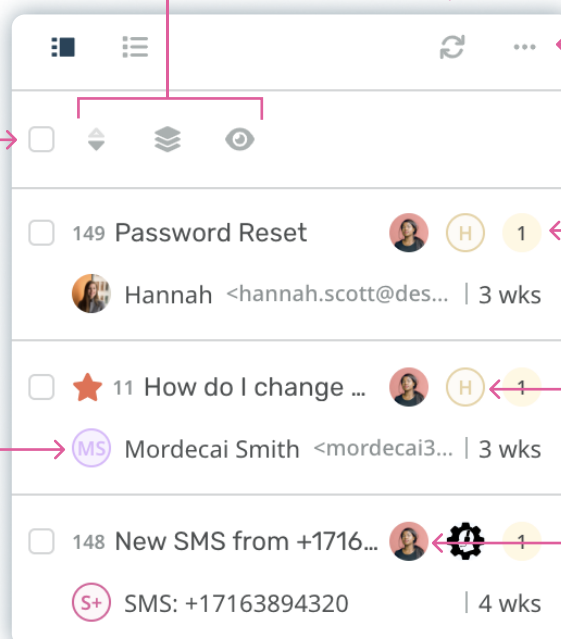


Table View

Table View gives you a full-screen view of tickets. With options to sort, group and view additional ticket details with more space for information.

User

The user who submitted the ticket.

Order, Group and Edit View

Manage and filter the tickets being displayed.

The screenshot shows the Deskpro Table View interface. At the top, there's a header bar with a 'New' button, two open tabs ('Weird meter ...' and 'Boiler makin...'), and a search icon. Below the header is a table with columns: ID, Subject, User, Agent, Last Reply, and a status icon. Three tickets are listed. Callouts point to various features: 'Mass Actions' points to the checkboxes in the ID column; 'User' points to the 'User' column; 'Assigned Agent' points to the 'Agent' column; 'Status & Urgency' points to the status icon in the last column; and 'Order, Group and Edit View' points to the 'Sort: Urgency', 'Group', and 'View' controls at the top right of the table.

ID	Subject	User	Agent	Last Reply	Status
<input type="checkbox"/> 5	Boiler making strange noises ★	Hazel Forester <hforrester...>	Hannah ...	7 days ago	3
<input type="checkbox"/> 6	Weird meter reading ★	Audrey Merivale <audrey...>	Hannah ...	5 days ago	1
<input type="checkbox"/> 10	Question about my statement ★	Augusta Wallen... <wallen...>	Hannah ...	4 days ago	1

Mass Actions

Apply actions to multiple tickets at once.

Assigned Agent

Status & Urgency

View the urgency rating of the ticket.

Kanban View

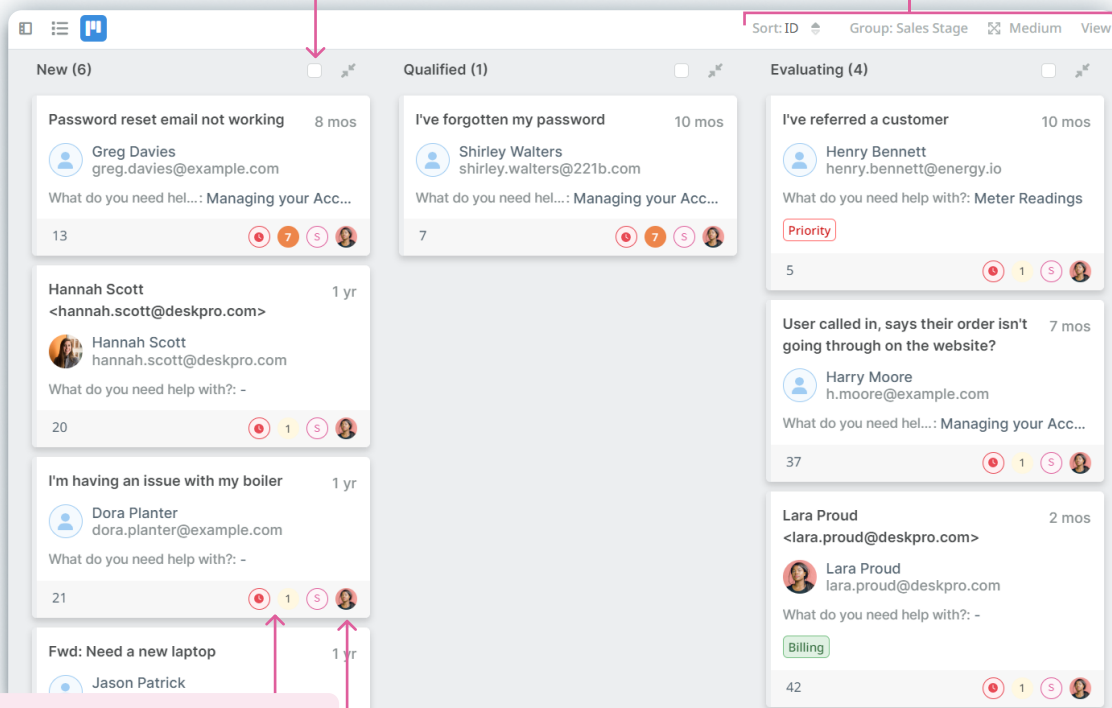
Kanban View displays tickets in a dynamic board view that lets you drag and drop tickets through your workflows. With the same powerful view, sorting, grouping controls as the other helpdesk views.

Mass Actions

Apply actions to multiple tickets at once.

Edit, Group, Order, and Resize View

Manage how tickets are being displayed and their size on the board.



Status & Urgency

View the urgency rating of the ticket.

User

The user who submitted the ticket.

Assigned Agent

Top tip!

Your viewing preferences will be remembered so when you open the helpdesk you will see the last view you had open.



4. Content Panel - The Ticket

The content panel houses the ticket - from the ticket, you will be able to apply actions such as replying, changing the status, etc. There are some key ticket components which are outlined below:

The screenshot displays the Deskpro interface for a ticket titled "Boiler making strange noises". The interface is divided into several sections, each with a callout box explaining its function:

- Tabs:** Switch between your open content windows. (Points to the top tabs: "Boiler making s...", "Nancy Stewart...", "Issue with com...")
- New Button:** Quick creation button for tickets, users or content. (Points to the "+" button in the top tabs)
- Ticket Header:** Key ticket information including subject, labels, or apply actions. (Points to the ticket title and status bar)
- Ticket Body:** The complete ticket thread including all messages and agent notes. (Points to the main message area)
- Productivity Tools:** Tools to aid replies, e.g. Snippets, Macros, translation, attachments. (Points to the bottom right area with "Send as", "Agent", "Team", and "Macro" buttons)
- Reply Box:** (Points to the "Write a message..." input area)
- Ticket Properties Pane:** Key assignment information, ticket fields and any active ticket actions e.g. Follow Ups, SLAs. (Points to the left sidebar containing agent, team, and ticket details)

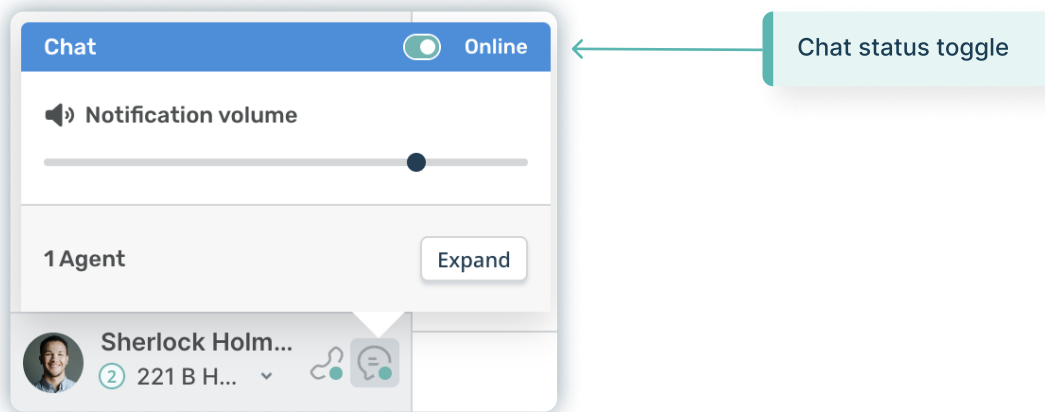
The ticket content includes a message from Hazel Forester (hforrester@example.com) asking for documentation, an agent note about escalation, and a follow-up email from Hazel asking if the noise has stopped.

Live Chat

If your organization is supporting users over Live Chat. You will have options to manage your chat status and settings.

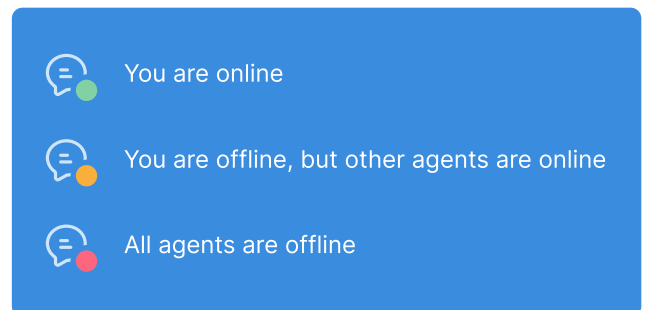
Status

You can set if you are **online or offline** from within the chat icon in the bottom of your interface:



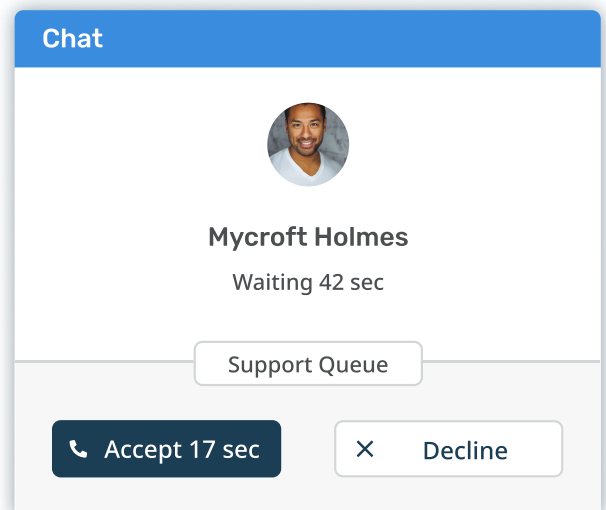
There are 3 status options for Chat, which are indicated by a green, amber or red dot on the icon.

From the Chat app you can also check who else is online and adjust your notification volume if needed.



Notifications

When an incoming chat is started, you will be notified by a popup in the right hand corner of the screen, like so:



Chat Tickets

Once you accept a chat with a user, a ticket will be opened and the chat will exist within the ticket. Some key chat actions and properties you have are highlighted below.

The screenshot shows the Deskpro chat interface with several callouts highlighting key actions and properties:

- Transfer to an Agent**: Transfer the chat to reassign it to another agent.
- Block User**: If a user abuses or spams the chat you can block them.
- Ticket Live Status**: Indicated by a green dot in the top right corner.
- Add an Agent**: Button to add more agents to the chat.
- End the Chat**: Button to end the chat.
- Chat Ticket Properties**: Assignment information, chat properties and fields, department.
- Chat Reply Box**: The input area for replying to the chat.

Voice

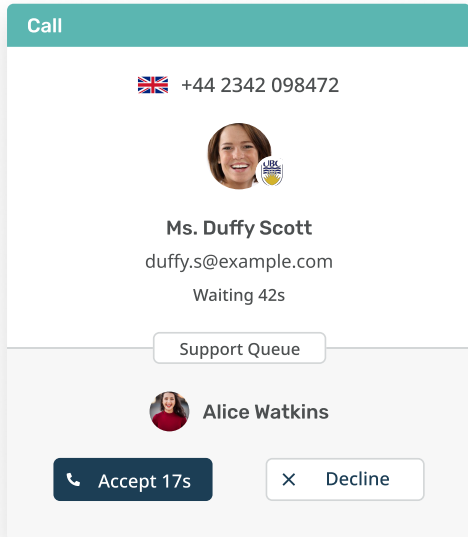
If your helpdesk has voice activated you will be able to support users over the phone. You are able to manage your voice status and settings from the Voice app.

Status

You can set your status, see which other agents are online, and set your notification volume from the Voice app.

There are 3 status options for Voice:

- You are online
- You are offline, but other agents are online
- All agents are offline

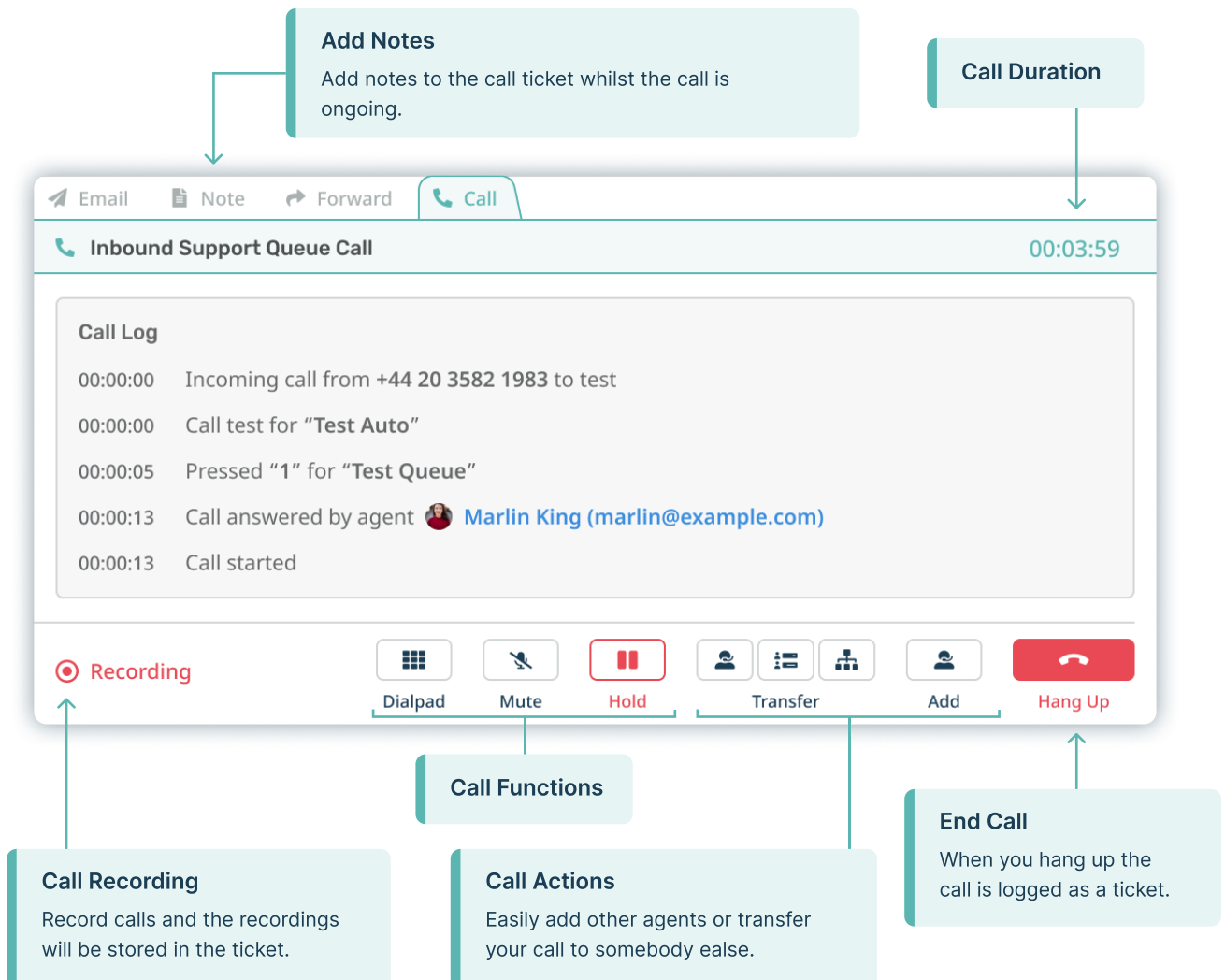


Notifications

When an incoming call is started you will see a notification pop up which tells you some information about the caller.

Voice Ticket

Once you start a call with a user, a ticket will be created. Here are some of the key call properties:

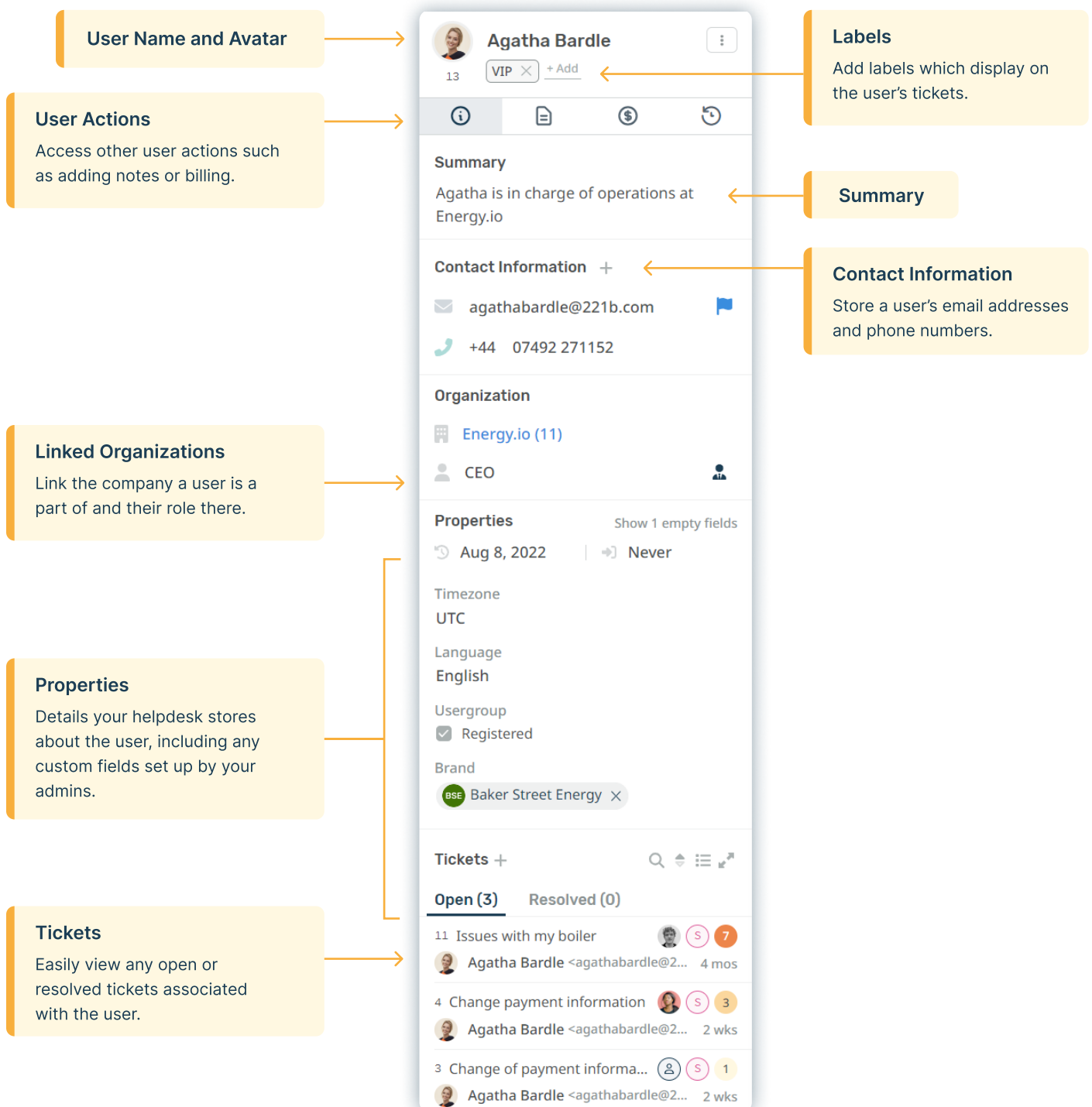


5. User & Org Profiles

User Profile

When you're looking at a ticket, the User profile will be visible to the right hand side of the ticket.

User records contain important information about the user, from the profile you can edit user information, create tickets on their behalf, and manage settings.



Organization Profile

If a User is associated with an Organization, you can view the organization's profile by clicking on its name in the User's details, this will let you view the organization profile on the right hand side of the ticket.

The diagram illustrates the Organization Profile interface, showing a central mobile app view with callouts for various sections:

- Organization Name**: Points to the top header of the profile page.
- Labels**: Points to the "Priority" dropdown and "+ Add" button, indicating where to add labels for tickets.
- Organization Actions**: Points to the "Back to User" button, indicating where to access other actions like adding notes or billing.
- Properties**: Points to the "Properties" section, which includes details like "Date created" (Aug 17, 2022), "Usergroup" (Employees), and "Hierarchy" (Parent: None, Children: Add Organization).
- Contact Information**: Points to the "Contact Information" section, which includes phone number (+44 07476 000422) and email (energy.io).
- Associated Domains**: Points to the "Associated Domains" section, which shows domains like @energy.io.
- Tickets**: Points to the "Tickets" section, which shows a list of tickets created by users associated with the organization.

The central mobile app view displays the following information:

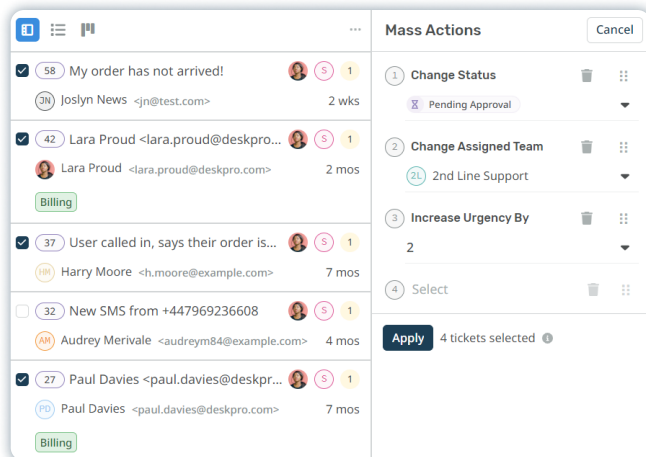
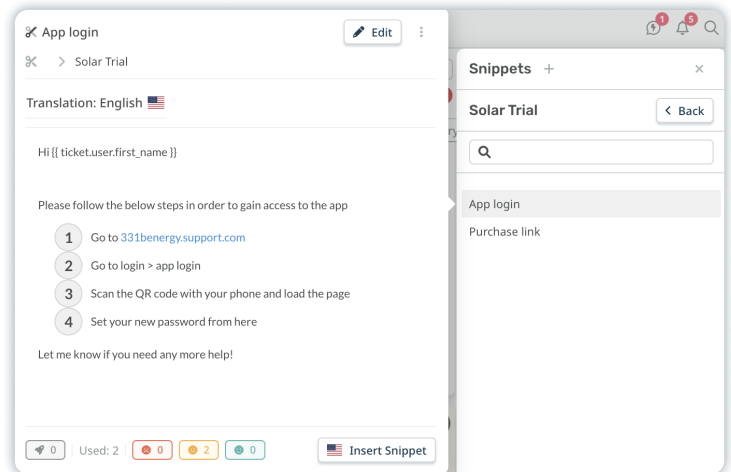
- Header**: Energy.io (with a menu icon)
- Summary**: Our Energy Company Partner. Run by Agatha Bardle.
- Contact Information**: +44 07476 000422, energy.io
- Properties**: Date created (Aug 17, 2022), Usergroup (Employees), Hierarchy (Parent: None, Children: Add Organization)
- Associated Domains**: @energy.io
- Members**: Agatha Bardle (CEO), Agatha Bardle, Audrey Merivale, Heather Brown
- Tickets**: Open (7), Resolved (4). List of tickets: 11 Issues with my boiler (Agatha Bardle, 4 mos), 4 Change payment information (Agatha Bardle, 2 wks), 32 New SMS from +447969236... (1)

Productivity Tools

You can use a number of automations to increase your productivity; apply a number of complex ticket actions with just a few clicks.

✂ Snippets

Insert dynamic canned responses from you and your team's custom Snippet library.

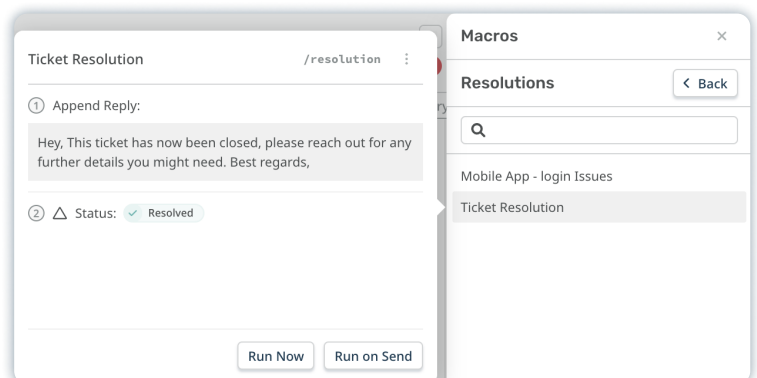


✓ Mass Actions

Apply the same set of pre-defined actions to up to 50 tickets simultaneously.

🔧 Macros

Compile multiple actions for repetitive processes into a single macro action to boost workflow efficiency.



CRM

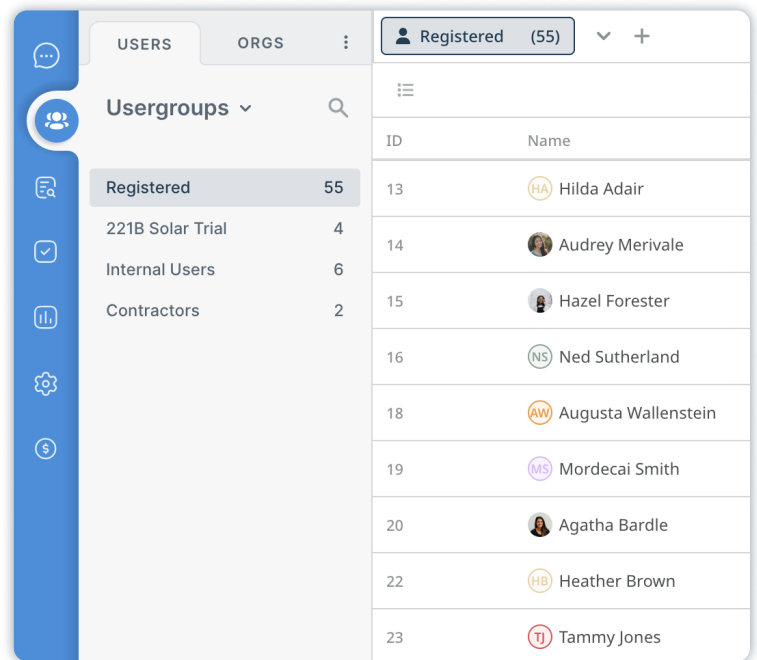
Deskpro comes with a comprehensive CRM system. From the CRM app you can view, manage and edit user and organization records that are stored within your helpdesk.

For users you can store information such as:

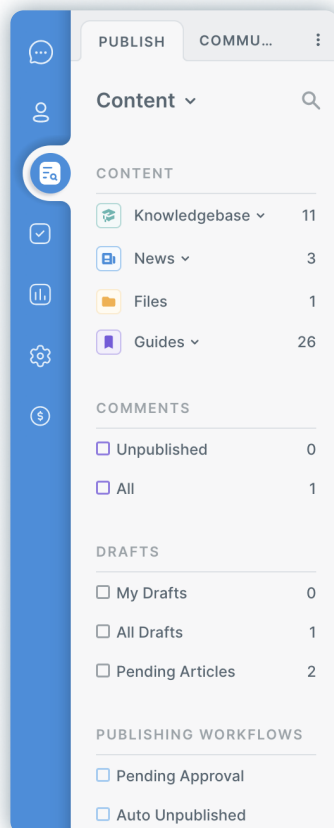
- Name, contact information and the organization they are associated with
- Tickets they have submitted
- Properties, notes and files
- The usergroup they belong to

For organizations you can store:

- All tickets submitted from the organization's members
- Associated email domain - to automatically assign new users to their organization
- Registered members
- Properties



ID	Name
13	Hilda Adair
14	Audrey Merivale
15	Hazel Forester
16	Ned Sutherland
18	Augusta Wallenstein
19	Mordecai Smith
20	Agatha Bardle
22	Heather Brown
23	Tammy Jones



CONTENT	
Knowledgebase	11
News	3
Files	1
Guides	26

COMMENTS	
Unpublished	0
All	1

DRAFTS	
My Drafts	0
All Drafts	1
Pending Articles	2


PUBLISHING WORKFLOWS	
Pending Approval	
Auto Unpublished	


Help Center


From the Help Center app you can manage the different types of content that is published on your Help Center, for both user-facing or internal use:

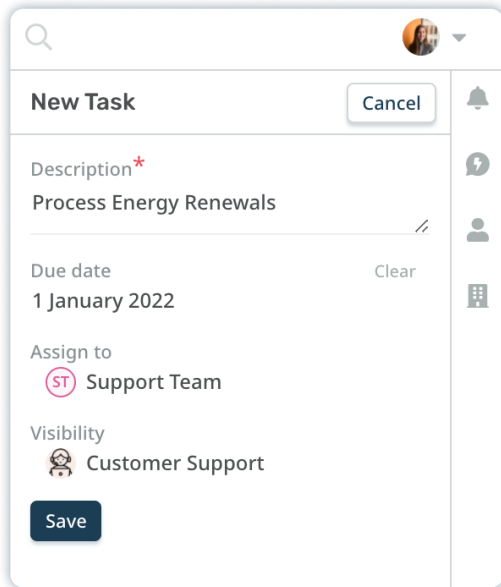
 **Knowledgebase Articles** - Articles that address common user issues and FAQs.

 **News Posts** - Time-sensitive announcements and updates.

 **Files** - Hosted downloadable content for your users, such as brochures and manuals.

 **Guides** - A library of instructional and structured user manuals for your products and services.

 **Community** - Users can submit comments, suggestions, and ideas and interact with one another.



The 'New Task' form in the Deskpro app includes a search bar at the top, a 'Cancel' button, and a notification bell. The form fields are: 'Description*' with the text 'Process Energy Renewals', 'Due date' set to '1 January 2022' with a 'Clear' button, 'Assign to' set to 'Support Team' (indicated by a red 'ST' icon), and 'Visibility' set to 'Customer Support' (indicated by a person icon). A 'Save' button is at the bottom.

Tasks

Create, assign and track agent tasks from the Tasks app.

You can create standalone tasks from the app, or create tasks linked to specific tickets which can be assigned to you or another agent.

Reports

View and create reports based on your helpdesk data. All of your organization's metrics can be viewed on custom dashboards.



Note:

You will only be able to access the reports app if an admin has granted you reports access.



> Next steps

Want to learn more about Deskpro?

If you have any questions about using Deskpro, please visit our Help Center at support.deskpro.com, where you can find a complete Agent guide and an extensive library of articles and videos.

And if you run into any problems you can also contact our Support Team directly at support@deskpro.com.

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