

Admin Quickstart Guide

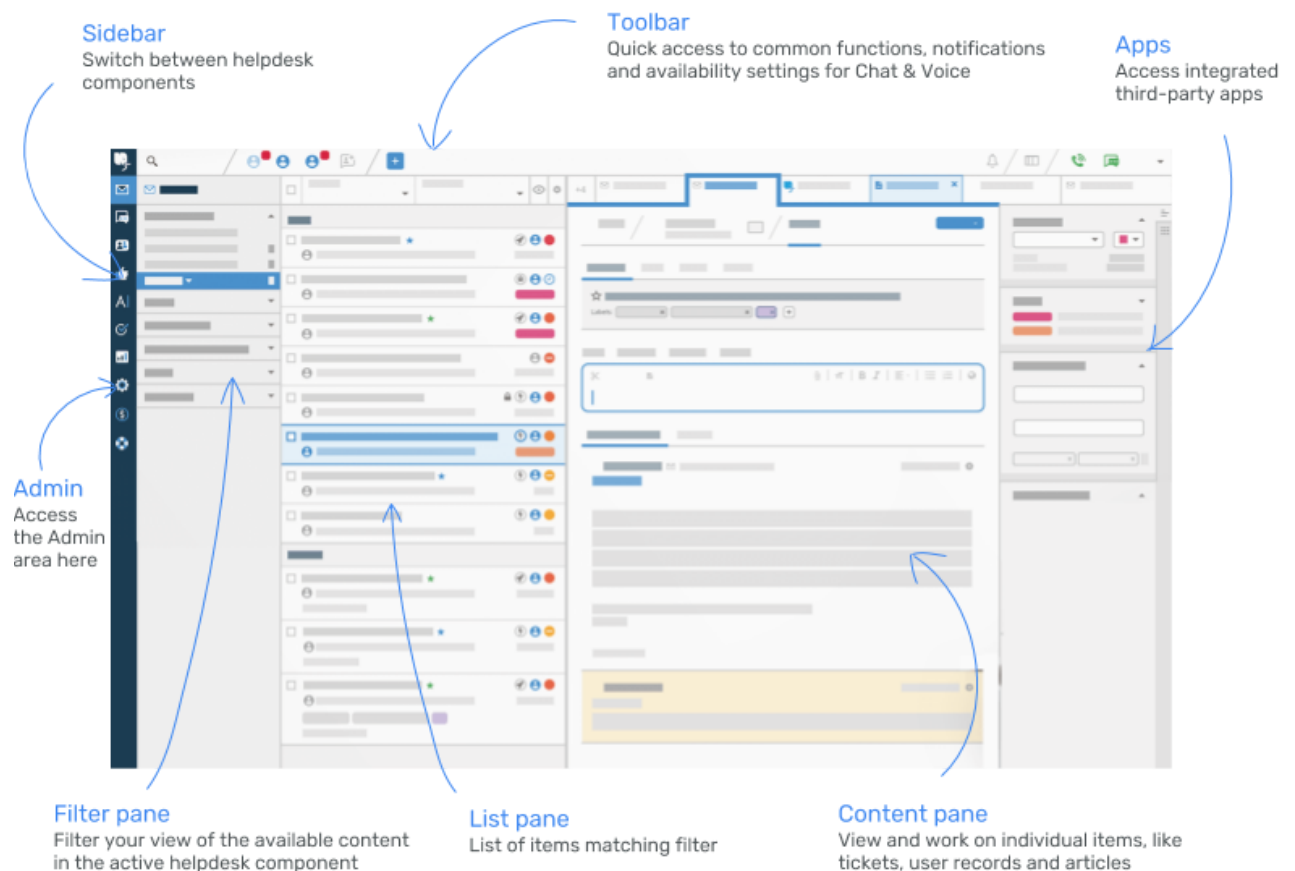
Deskpro On-Premise

5 easy steps to set up your brand new helpdesk

Welcome to Deskpro. 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

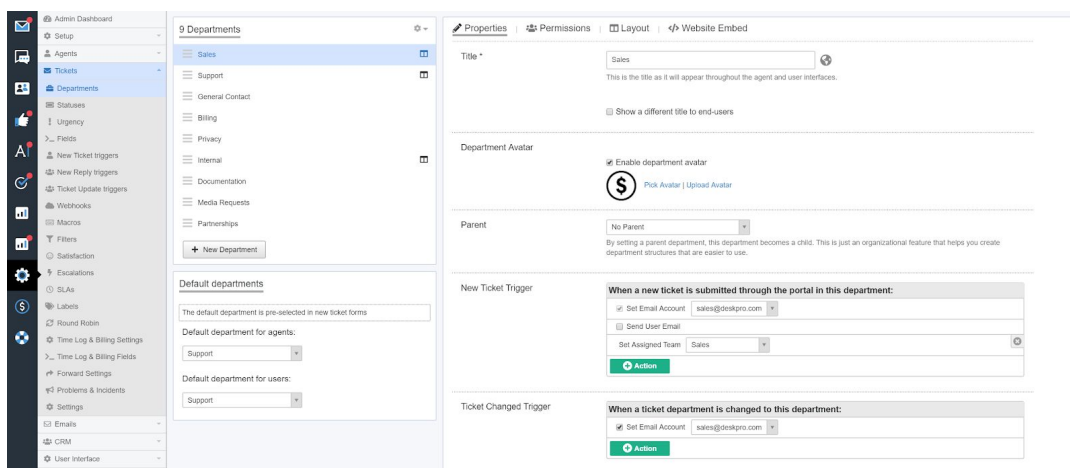
Investing in new software is a big decision that needs to be made carefully. Helpdesk software should be able to accommodate and support the way your organization does business. Deskpro can be customized to your specific requirements.



Step 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.

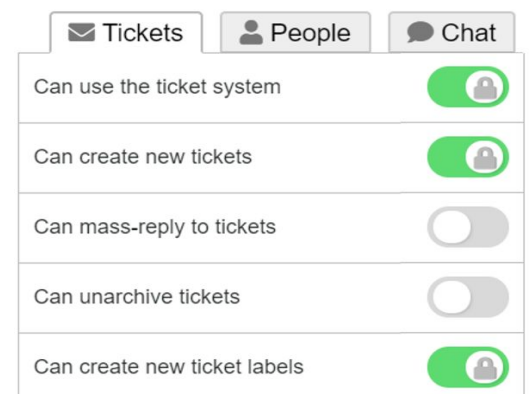
1. To add Departments, go to **Admin > Tickets > Departments**. There are already Sales and Support departments that you can edit or delete.
2. Click the **+ New Department** button, add a new department title, and click **Save**. You can add as many Departments as you want.
3. You can create customized **Contact Forms** for each individual Department. They can include custom fields with separate layouts for Users and Agents.



Step 2: Add your Agents

Testing 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 & also our [Agent Quickstart Guide](#) to get them up to speed ASAP.

1. Go to **Admin > Agents > Agents**.
2. Add individuals using **+ Add** or use the **+ Bulk Add Agents** function to quickly add your whole team. By default, Agents will have all [Permissions & Notifications](#) enabled.
3. You can restrict an Agent's access by clicking on their **Permissions** tab. For Department permissions, click on the **Departments** tab.



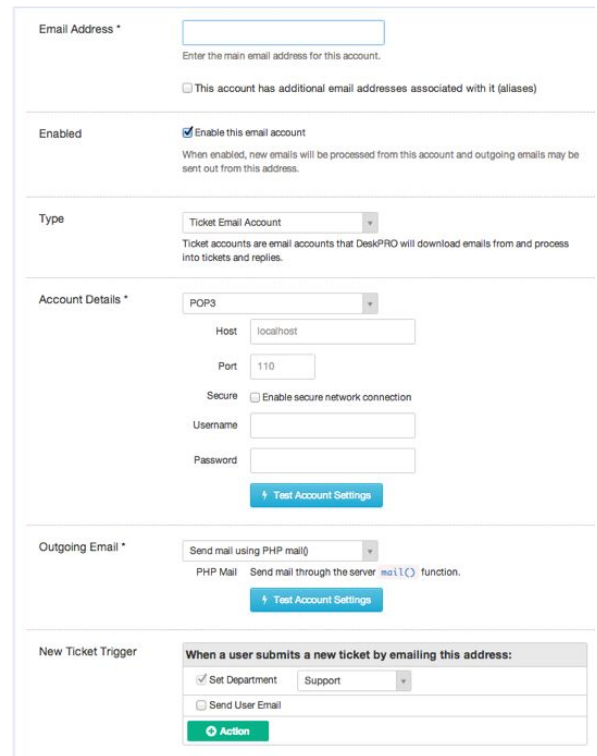
Step 3: Link your communication channels

Users can interact with your organization and create tickets in several ways through Deskpro. The three main channels are *Email, Live Chat and Forms*.

Email

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

1. To add linked email accounts, go to **Admin > Emails > Email Accounts** and click the **+ New Email Account** 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) and enter the **Account Details**.
5. Specify how to send outgoing mail, then click **Test Account Settings**.
6. Set the **Department** for tickets received to the email address with **New Ticket Trigger**.



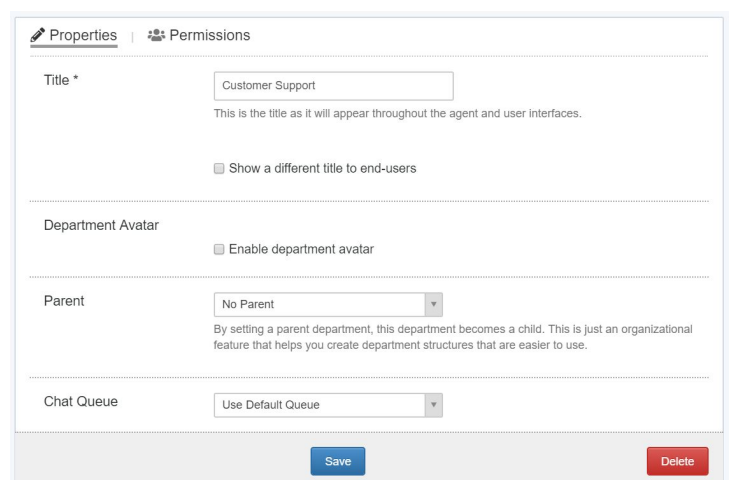
The screenshot shows the 'New Email Account' configuration form in Deskpro. It includes the following sections:

- Email Address ***: A text input field with a placeholder 'Enter the main email address for this account.' and a checkbox for 'This account has additional email addresses associated with it (aliases)'.
- Enabled**: A checked checkbox 'Enable this email account' with a note: 'When enabled, new emails will be processed from this account and outgoing emails may be sent out from this address.'
- Type**: A dropdown menu set to 'Ticket Email Account' with a note: 'Ticket accounts are email accounts that DeskPRO will download emails from and process into tickets and replies.'
- Account Details ***: A dropdown menu set to 'POP3' with fields for 'Host' (localhost), 'Port' (110), 'Secure' (unchecked, 'Enable secure network connection'), 'Username', and 'Password'. A 'Test Account Settings' button is below.
- Outgoing Email ***: A dropdown menu set to 'Send mail using PHP mail()' with a note: 'PHP Mail Send mail through the server mail() function.' and a 'Test Account Settings' button.
- New Ticket Trigger**: A section titled 'When a user submits a new ticket by emailing this address:' with a checked checkbox 'Set Department' (Support) and an unchecked checkbox 'Send User Email'. An 'Action' button is at the bottom.

Live Chat

The quickest and easiest way to assist your Users in-the-moment is by using Live Chat. [Customize the chat & ticket widget](#) to your brand, and embed it anywhere on your website.

1. Go to **Admin > Chat > Chat Departments** to manage Chat Departments & Agent Permissions.
2. Setting up *Chat Queues* allows communications to be shared evenly and managed automatically. **Admin > Chat > Chat Queues**.
3. See *Embedded Widgets* section (on page 6) for embedding chat widget.



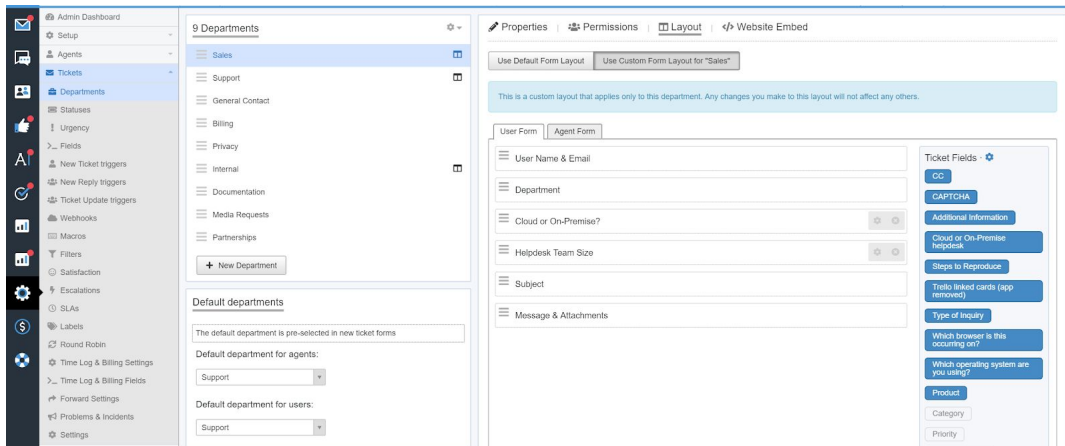
The screenshot shows the 'Properties' tab of the 'Chat Department' configuration form. It includes the following sections:

- Title ***: A text input field with 'Customer Support' and a note: 'This is the title as it will appear throughout the agent and user interfaces.' and a checkbox 'Show a different title to end-users'.
- Department Avatar**: A checkbox 'Enable department avatar'.
- Parent**: A dropdown menu set to 'No Parent' with a note: '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.'
- Chat Queue**: A dropdown menu set to 'Use Default Queue'.

At the bottom, there are 'Save' and 'Delete' buttons.

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 & agents.



1. Responsive dynamic forms are created using *Custom Form Layouts* at **Admin > Tickets > Departments > Layout**.
2. Contact Forms automatically appear on your support portal, click on the *Contact Us* tab.
3. To put a form anywhere on your website, select **</> Website Embed**. Pick from an *Embedded Form*, *Direct Link* or *Popup Window* on your site by adding the code.

Step 4: Automate your helpdesk processes

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 <i>Sales</i> 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 > Tickets > New Ticket Triggers > + Add**
2. Give the Trigger a title, such as "Ticket containing Booking."
3. Click on **+Criteria > Email Subject > Contains** on the dropdown menu. Enter *Booking* into the text field.
4. Click on **+Action > Set Assigned Team > Sales**. Click Save. Why not submit a ticket to your helpdesk with Booking in the subject so you can see it in action!

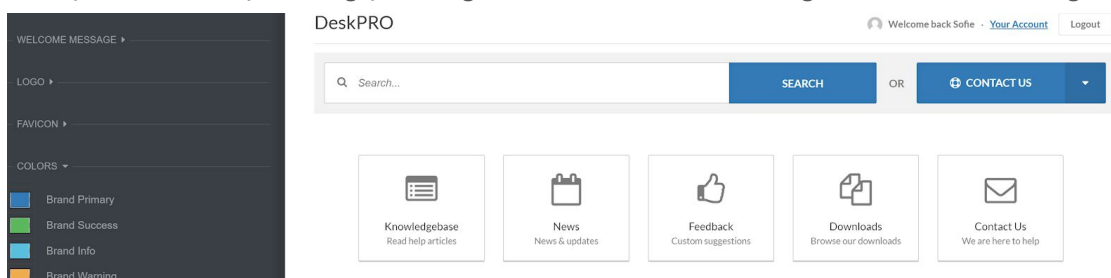
You can read more about Automations in our [guide](#).

Step 5: Personalize your Portal and content

Web portal

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

1. Go to **Admin > User Interface > Portal** to customize your portal. Align the portal with your brand by adding your logo, brand colors & setting a welcome message.

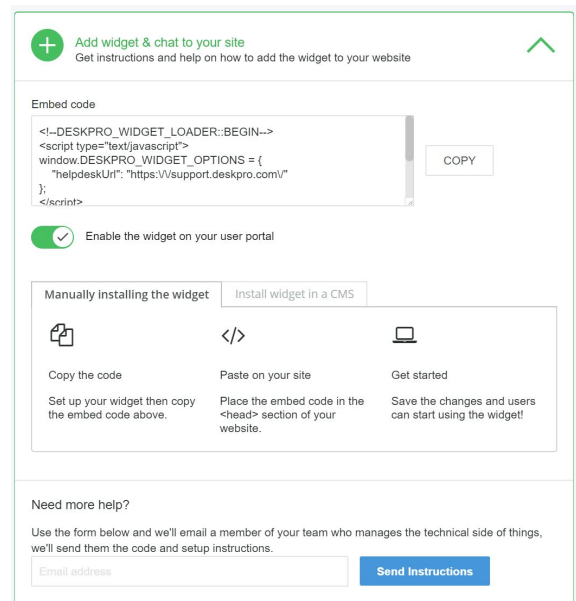


2. Your web portal can be found at your-account.deskpro.com. To add a custom domain, like support.yourdomain.com, go to **Admin > Settings > Domain / URL setup**. You'll need to be able to change the DNS record for your domain.
3. You and your Agents can create useful content - like knowledgebase articles - for your portal 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. To access the chat widget, go to **Admin > User Interface > Site Widget & Chat**.
2. Customize the look and behavior of your widget to fit your needs.
3. When you're happy, click **Add widget & chat** to your site to get the code snippet and installation instructions.
4. When there *aren't* any agents available for live chat, the widget displays your **Ticket Form** for users to submit a ticket.






+ Add widget & chat to your site
Get instructions and help on how to add the widget to your website

Embed code

```
<!-DESKPRO_WIDGET_LOADER::BEGIN-->  
<script type="text/javascript">  
window.DESKPRO_WIDGET_OPTIONS = {  
  "helpdeskUrl": "https://support.deskpro.com/"  
};  
</script>
```

✓ Enable the widget on your user portal

Manually installing the widget | Install widget in a CMS

		
Copy the code	Paste on your site	Get started
Set up your widget then copy the embed code above.	Place the embed code in the <head> section of your website.	Save the changes and users can start using the widget!

Need more help?

Use the form below and we'll email a member of your team who manages the technical side of things, we'll send them the code and setup instructions.

Email address

Send Instructions

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 manual](#) and an extensive library of guides and articles. You can also contact us directly at support@deskpro.com.

Good luck, and thank you for choosing Deskpro.
