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Getting Started on Deskpro

Eloise Rea - 2025-07-30 - [\(0\) megjegyzés](#) - [Getting Started](#)

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! ☑

1. Departments: The Foundation of Your Helpdesk

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](#).

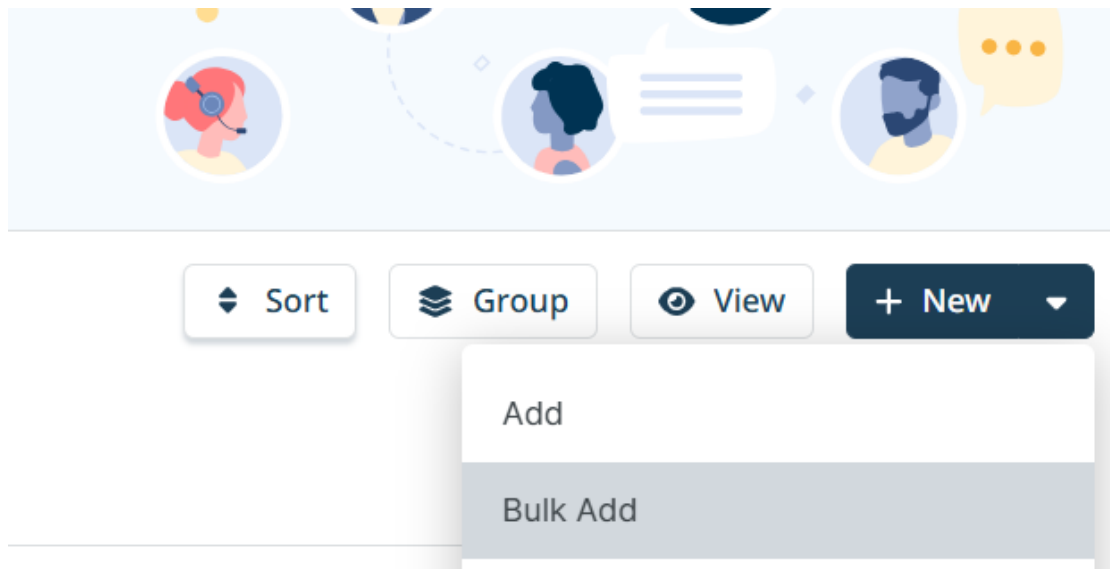
2. Invite Your Team

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](#)

3. Connect Your Support Channels

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.

4. Automate Your Helpdesk

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

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

To Learn more about triggers, watch our short video here:

5. Make It Yours: Branding & Customization

Why Customize?

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

Update Your Branding

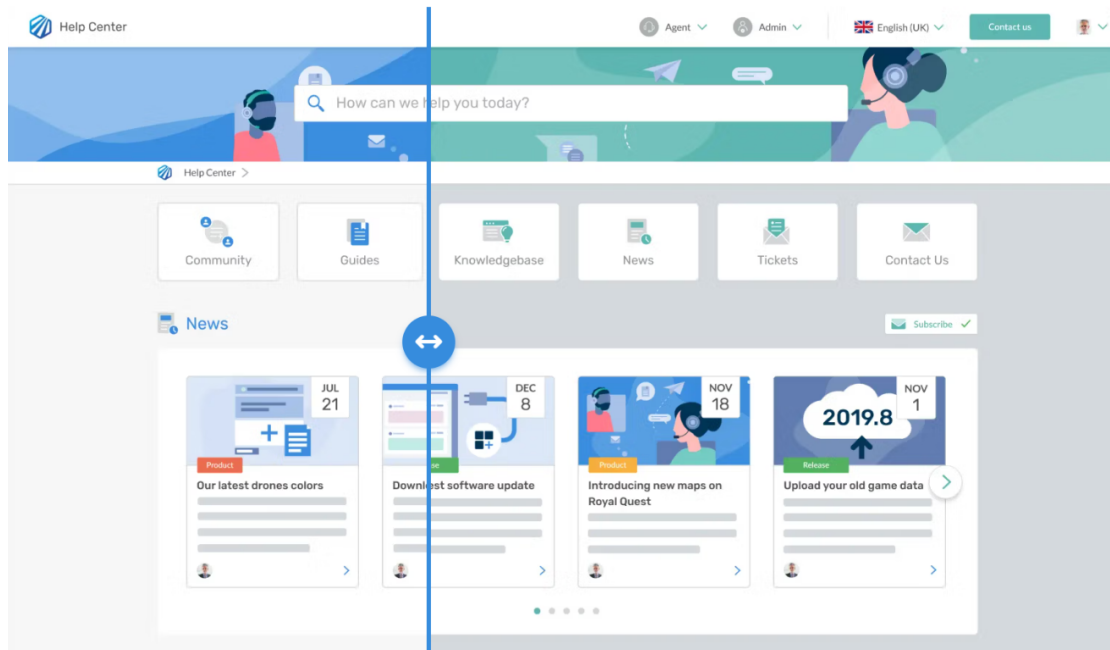
Go to **Admin > Configuration > Branding** to upload your logo, set your helpdesk name, and configure your external-facing help center.

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](#).

6. Add Integrations & AI

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

- [Setting up AI](#)
- [Explore our Apps](#)

7. Import Your Data

☐ 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.