deskpro® the help desk software platform+

support@deskpro.com

DeskPRO Helpdesk Software: Agent Interface Quick Start Guide

The DeskPRO helpdesk platform is designed to make it easy to handle problems and questions from your users. Your helpdesk ties together all the information about each issue into a single **ticket**. Managing these tickets via the Tickets app forms the basis of your organization's helpdesk.

DeskPRO includes other apps to help you manage communication with your users, including live chat, user feedback, CRM, tasks and publishing help content.

You should have an email called *"Your new DeskPRO helpdesk agent account"* with your login details.

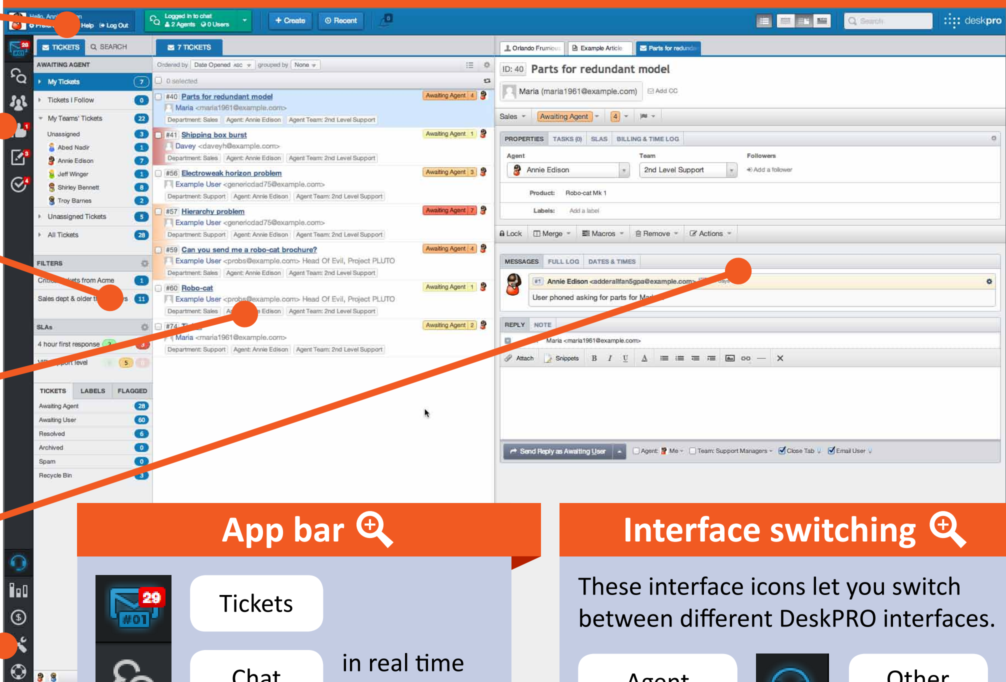
Account types within DeskPRO

users the people you are helping; if you're using DeskPRO for customer support, this will be your customers; for an internal helpdesk, this will be your organization's staff.

agents you and other staff within your organization who use DeskPRO to provide help to your users.

admins agents who have administrator access to configure your helpdesk.

After you log in, you'll see the *Agent* interface below.



The **toolbar** gives you quick access to common functions

App bar

The **filter pane** enables you to select lists of items you want to work on

The **list pane** shows the results of your selection in the filter pane

The **content pane** is where you view and work on individual items

Interface selection controls

App bar

Tickets	
Chat	in real time with users
CRM	user records
Feedback	user suggestions
Publish	help content
Tasks	

The app bar lets you switch between working with different types of content.

The blue icon tells which app is currently selected. Red numbers tell you the number of items that need attention from an agent.

Interface switching

These interface icons let you switch between different DeskPRO interfaces.

- Agent
- Reports
- Billing
- Admin
- User portal

Other agents who are logged on and available to IM

Toolbar

Your account & preferences

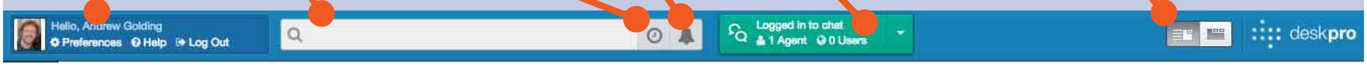
Search bar

Your recently viewed items

Notifications

Log in to chat & view online users

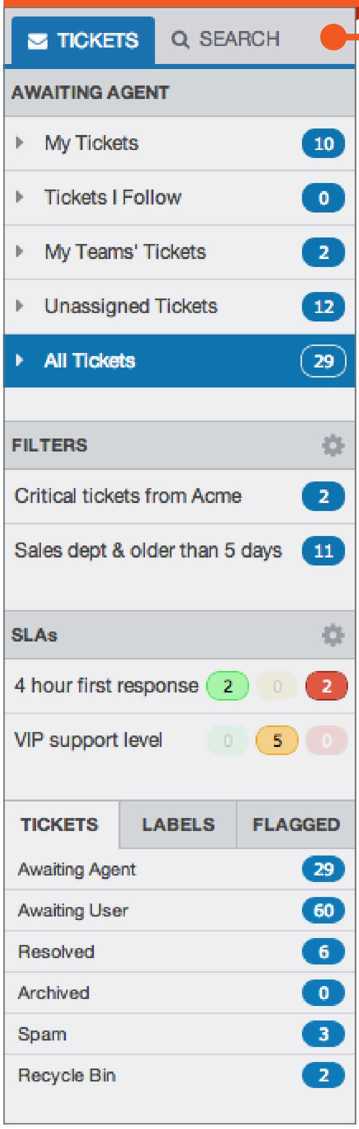
Toggle view (1-column or 2-column)



The Tickets App

The filter pane is where you select a list of tickets to work on.

Finding Tickets



Advanced search for tickets

Tickets **awaiting agent** need attention

Custom filters

Shows if tickets are passing or failing your Service Level Agreement

All tickets by status

Ticket status

Each ticket has a status, which indicates who needs to act on the ticket next.

Awaiting Agent An agent needs to perform the next action on the ticket; this will usually involve replying to the user.

Awaiting User You're waiting for the user to contact your helpdesk, typically to provide more information about their issue.

Resolved The issue is resolved and communication has ended. Resolved tickets can be re-opened if needed.

Agent assignment

Tickets start out unassigned but can be assigned to an agent and/or a team.

My Tickets shows tickets that are assigned to you.

My Teams' Tickets shows tickets that are assigned to any team which you're a member of.

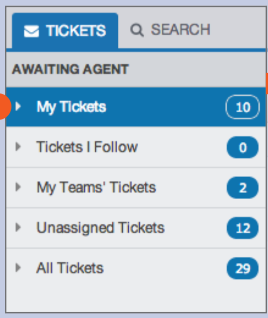
Tickets I Follow is a way to keep track of tickets that you're not directly assigned to, but you are still monitoring.

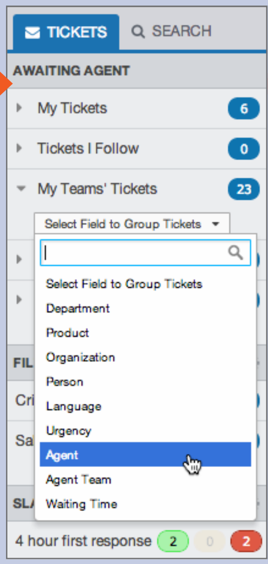
Unassigned Tickets are neither assigned to a team nor to an agent.

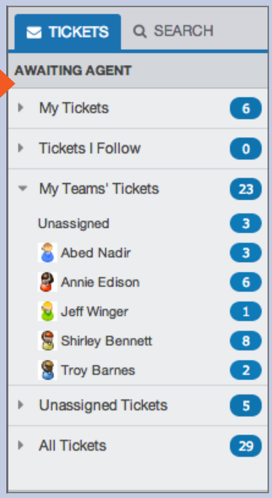
Grouping tickets with "Awaiting Agent" status

You can group tickets with **"Awaiting Agent"** status by a number of fields, for example to find tickets assigned to each of the agents in your team.

Click any of the small arrows to filter by custom groups







Tickets in the list pane

The tickets which match the criteria you select in the filter pane are then shown in the list pane. Click a ticket to open it in the content pane. A ticket that is open in the content pane is highlighted in blue.

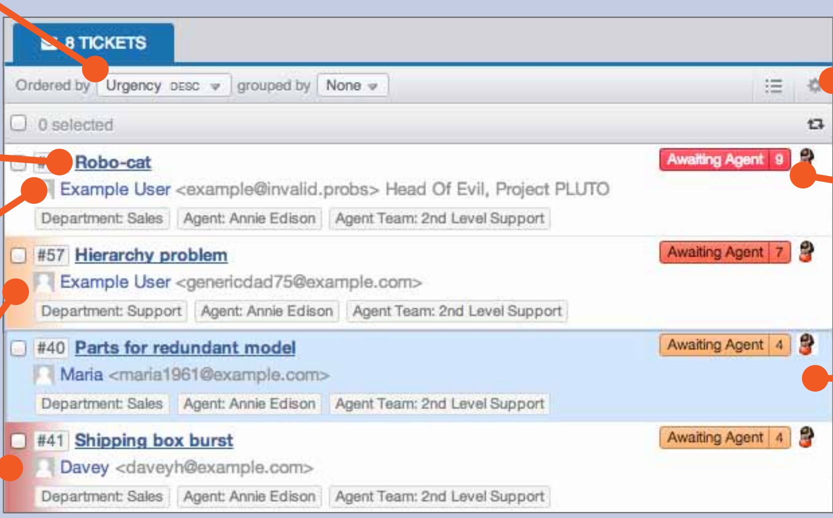
Change how tickets are ordered: currently in descending order of urgency

Subject

User

Ticket is close to failing an SLA (amber)

Ticket has failed an SLA (red)

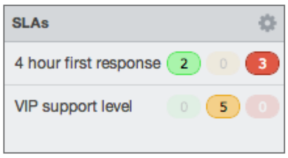


Change the information displayed for tickets in list

Urgency is 9

Ticket is open in content pane (blue highlight)

An **SLA** is a condition to meet (such as replying to a new ticket within 4 hours). When a ticket is close to failing an SLA, it is marked amber; when it fails, it is marked red.

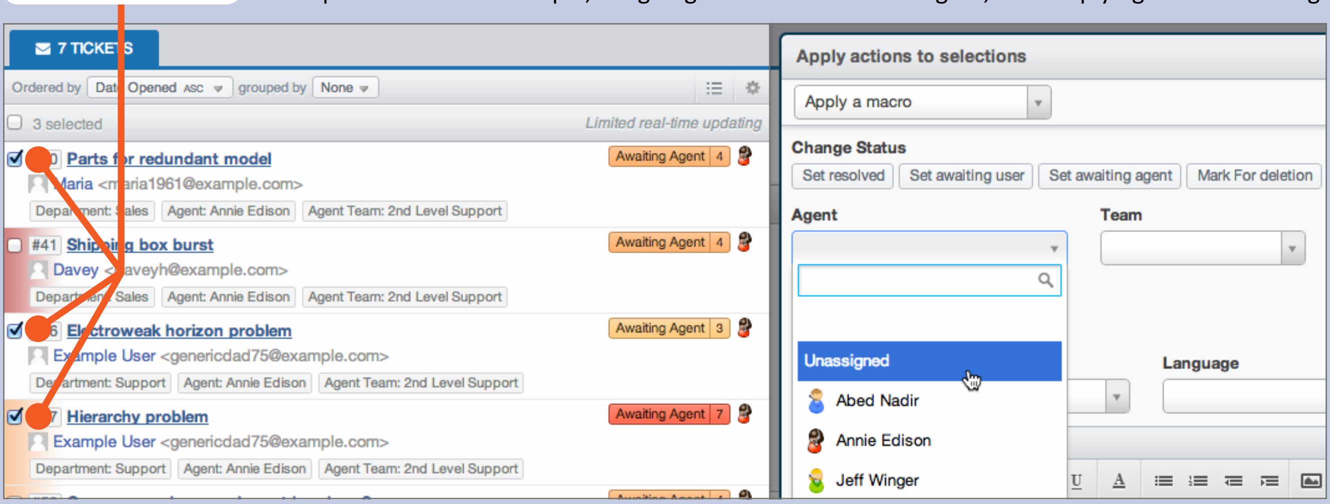


Urgency is a score from 1 to 10 – where 10 is most urgent. It can be changed by agents or by automatic rules set up by your DeskPRO administrators. It is designed to help you prioritize tickets.

Select multiple tickets

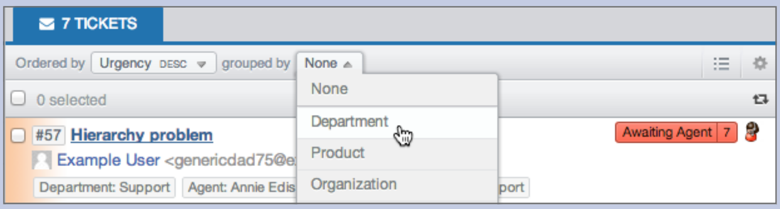
Selected tickets

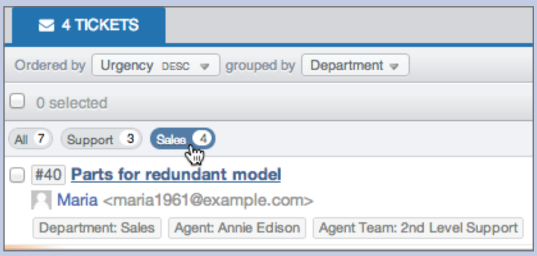
You can select multiple tickets with checkboxes. This is useful if you need to apply the same action to multiple tickets – for example, assigning several tickets to an agent, mass replying or bulk deleting.



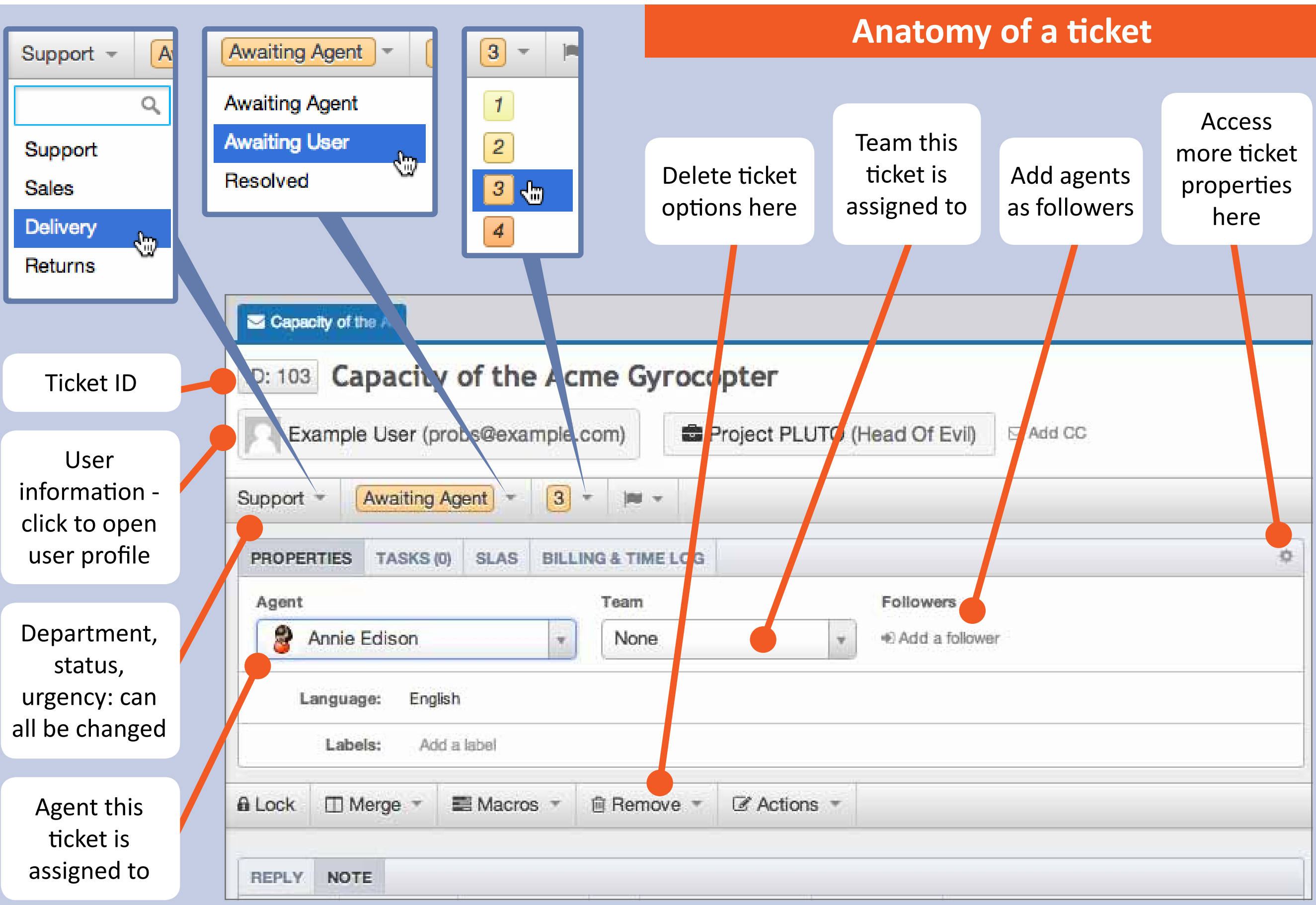
Grouping tickets

You can group tickets in the list pane. If you've grouped tickets in the filter pane in one way, this allows you to sub-group them: for example, tickets assigned to a specific agent, grouped by the department.





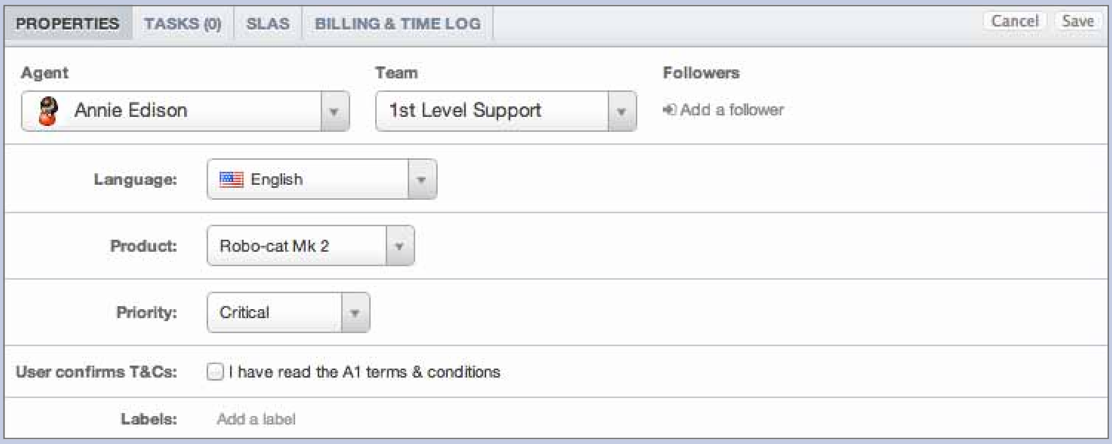
Anatomy of a ticket

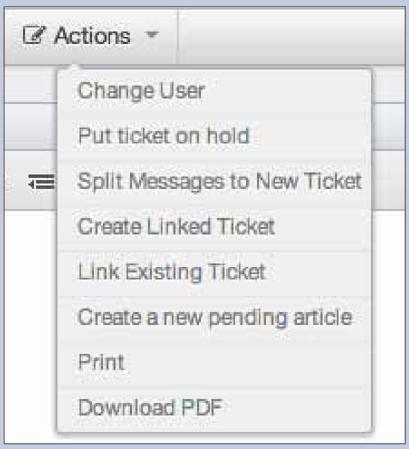


Properties

The cog in the top right of the ticket's **Properties** tab lets you access additional ticket fields.

What you see here will be determined by how your administrators have configured your helpdesk.





Actions menu

The **Actions** pull-down menu above the reply box offers advanced functions:

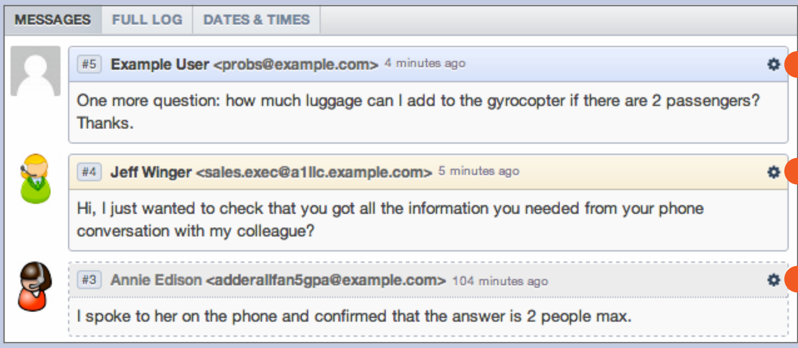
You can put a ticket on **hold** status – this is useful if the user is awaiting a reply, but you are waiting for something else to happen (for example, hearing back from a third party) before you can answer.

Create a new pending article is a way to note that a knowledgebase article should be created based on the ticket.

Ticket messages

By default, messages are displayed with the newest message first and the reply box at the top.

You can use **Preferences** to switch to displaying the oldest message first, with the reply box at the bottom.



User message

Agent message

Agent note (users can't see this)

Replying to a ticket

When you reply to a ticket, by default the ticket is assigned to you, your reply is emailed to the user, and the ticket status is set to "awaiting user".

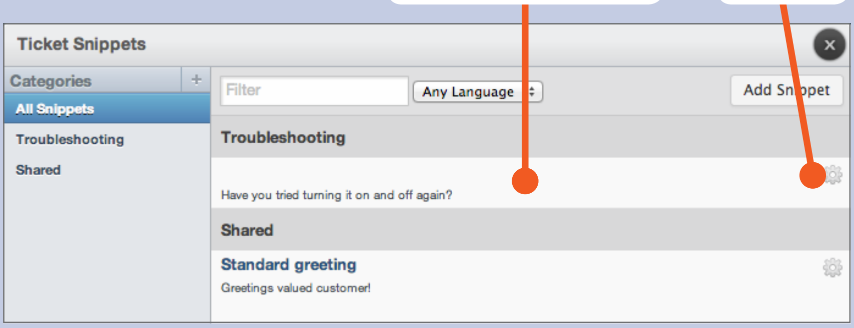
In some situations, you'll want to keep the status as **awaiting agent** or mark the ticket as **resolved** after you reply.

You can also change the assigned agent.

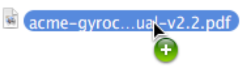
Snippets speed up the entry of phrases or replies you use repeatedly.

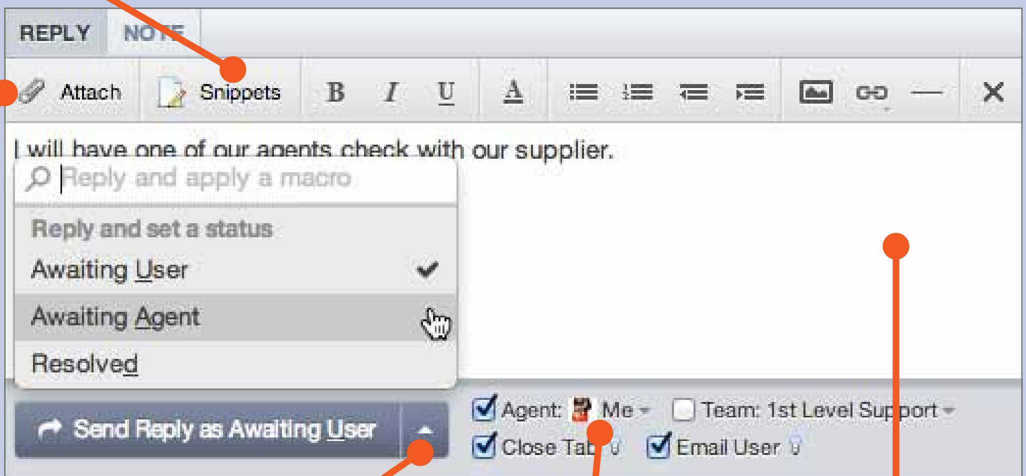
Click to insert snippet into current message

Edit snippet



Use the **Attach** button to add attachments, or just drag files onto the reply box. You can paste images with Ctrl-V if you use Chrome or Firefox.



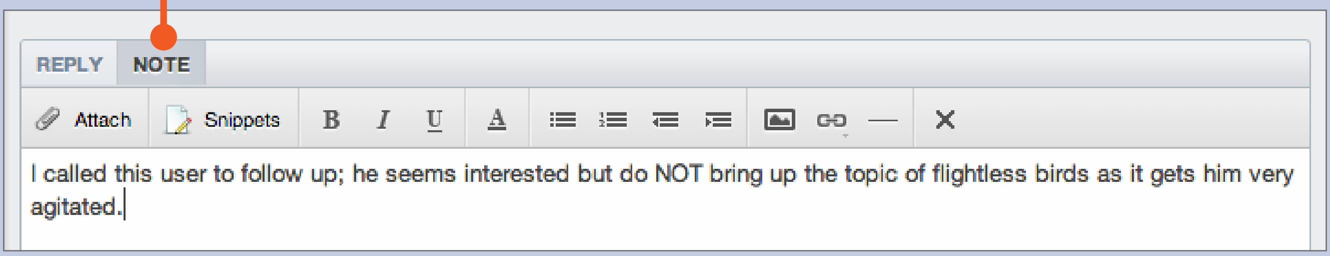


Set ticket status after reply

Set assigned agent after reply

Write your reply to the user here

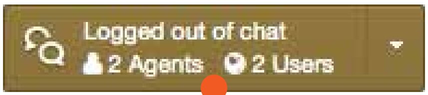
You can write a **note** which is visible only to other agents, but not to the user. Just click on the **Note** tab.



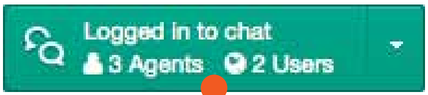
The Chat App

Users can initiate a real-time chat conversation from your web portal or website. You can sign in and out of the chat system using the pull-down menu in the toolbar.

No agents logged in; chat is disabled



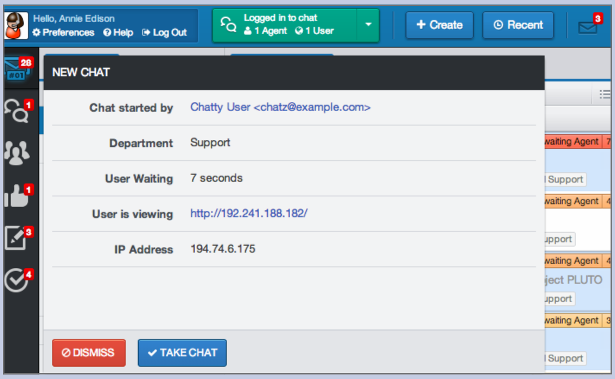
You are logged out, but other agents are logged in



You are logged in to chat

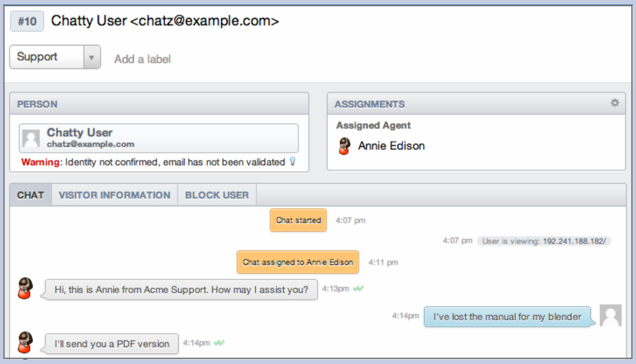
New chat

When a user initiates a chat, you will see a **New Chat** notification at the upper left of the interface.



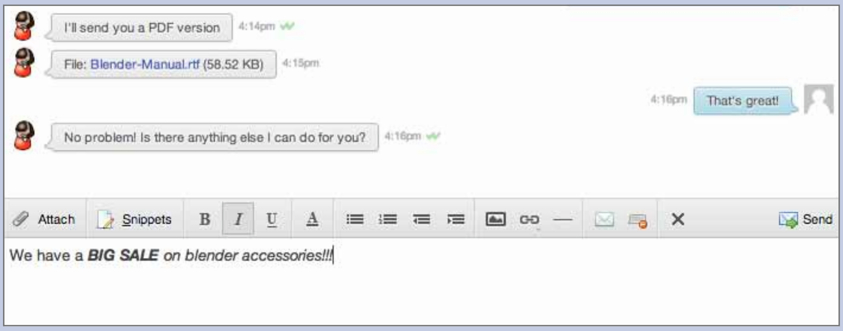
Chat accepted

If you accept the chat, it opens in the content pane.



Chat format

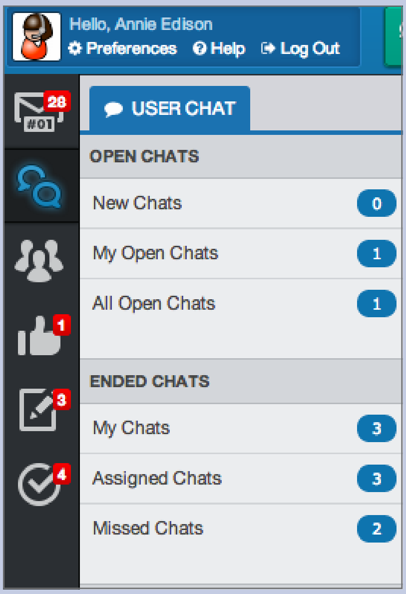
Chatting works much like any instant messaging service.



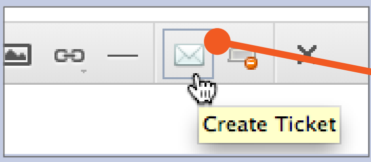
You can format your messages, send attachments and use snippets just as you do when replying to a ticket.

Chat app

You can use the Chat app to accept open chats, or view missed chats and the content of closed chat sessions.



Creating a linked ticket from a chat



Use this button while chatting to create a ticket linked to the chat. This is particularly useful if an issue raised in chat needs to be followed up

You can also create a linked ticket from a closed or missed chat

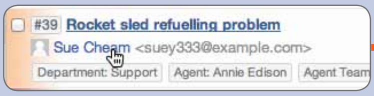
The CRM App

The DeskPRO CRM app helps you keep track of your users.

User records

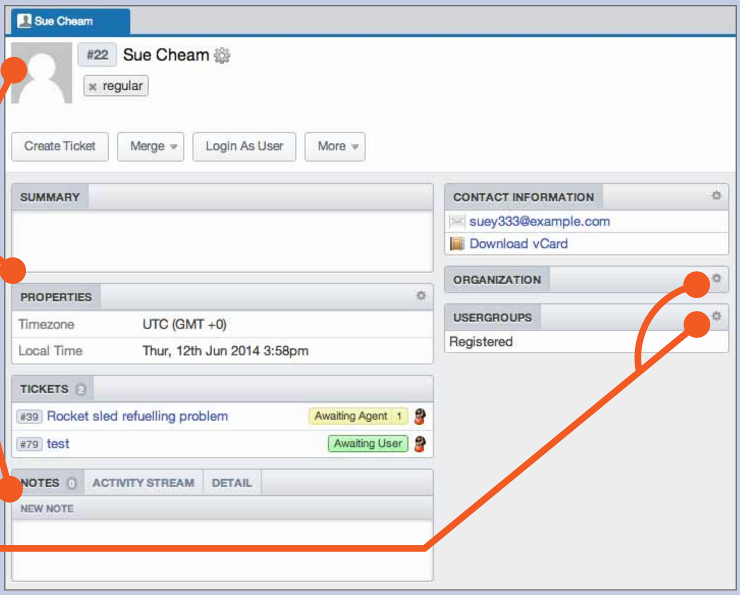
You can see detailed user information by clicking on a user's name in various places:

Ticket



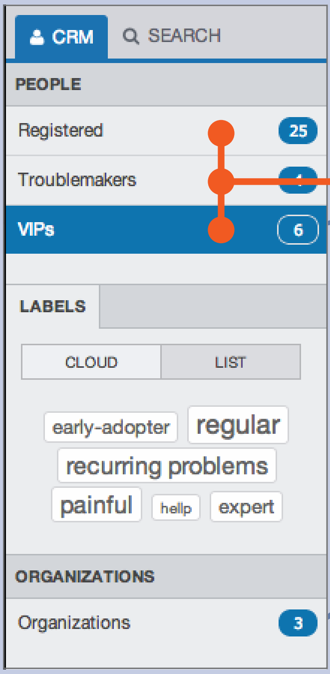
List pane

Chat



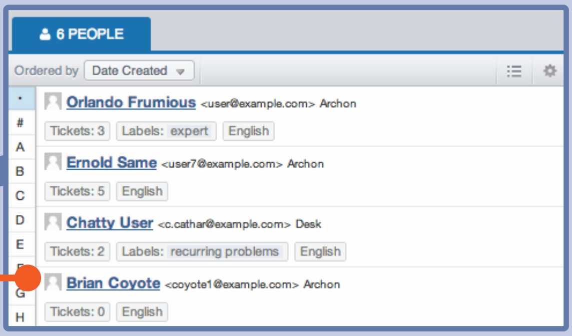
Users can belong to **organizations** and **usergroups**. Edit them with these cogs.

Usergroups & organizations



Usergroups

"VIPs" usergroup



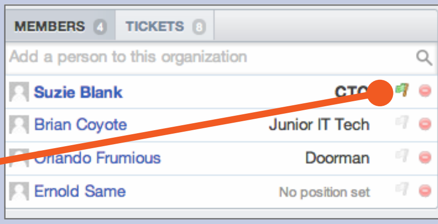
Usergroups affect what the user can do with tickets, chat and web portal content – your administrator decides the settings.

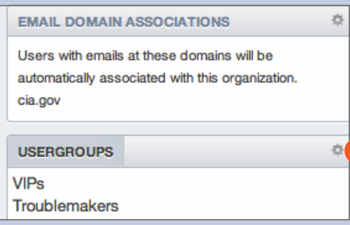
Organizations track who the user works for. DeskPRO can automatically assign users to an organization based on their email addresses.

More functions

Open an organization in the content pane to access more functions:

Click this flag to make user a **manager** - they can now see *all* tickets for the organization.





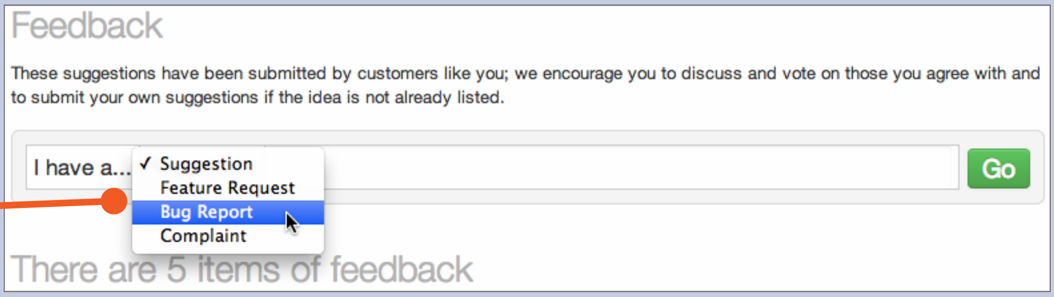
Add everyone in the company to a certain **usergroup**

The Feedback App

Users can submit feedback, such as ideas for new products or suggestions for how to improve your services, through your web portal. Other users can vote on this feedback, enabling you to crowdsource the most popular ideas.

Feedback types

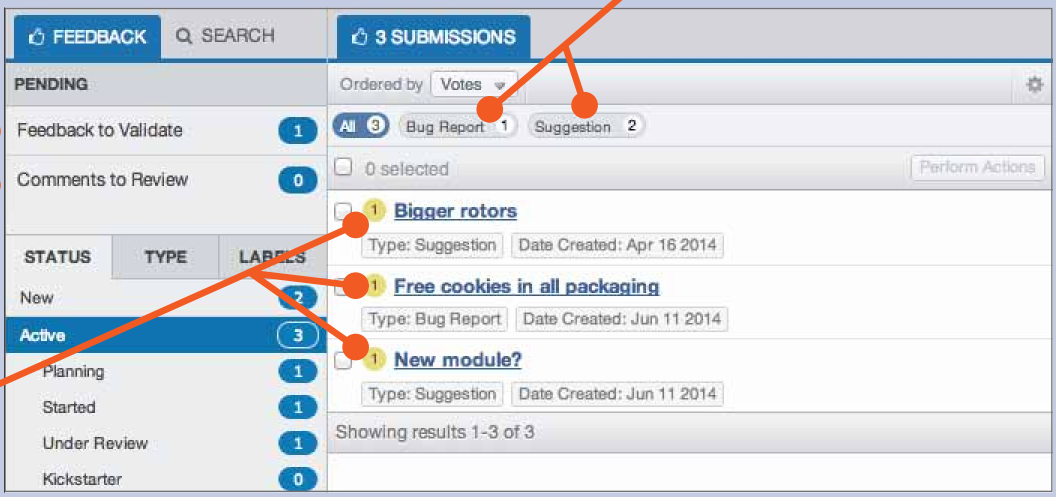
Feedback **types** are set by your administrator



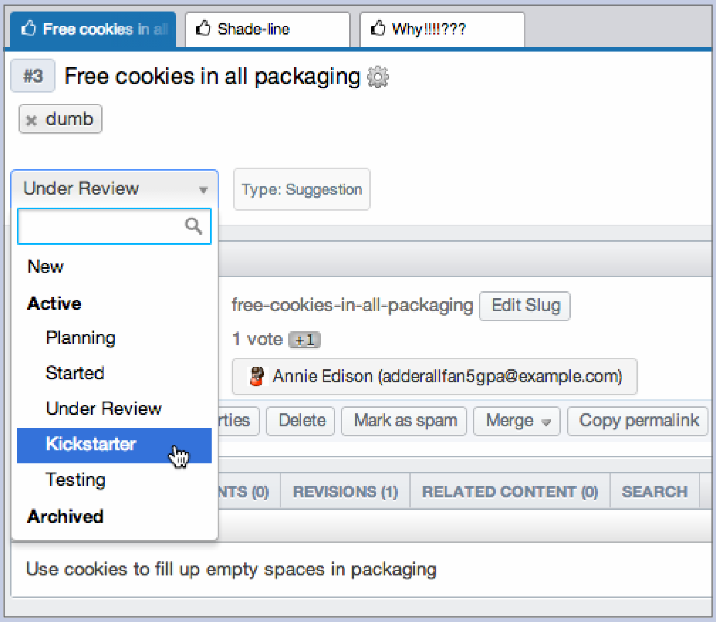
Filter feedback by type

You may need to approve feedback and comments before they are shown on the portal.

Number of votes for each item



Feedback statuses



The **status** of feedback lets you track how your company is going to deal with each item.

You can change the status by opening an item of feedback in the content pane, or with mass actions in the filter pane.

Active statuses mean that your company is acting on the feedback, or at least considering it.

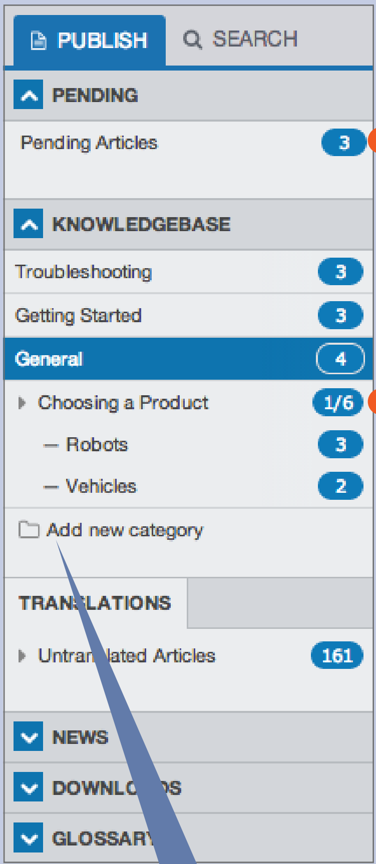
Archived statuses mean that the feedback has been dealt with, either acted on or rejected.

The Publish App

The Publish app is where you manage the content available on your web portal.

- **Knowledgebase** articles are used for help or how-to information. You can organize them into categories. Articles are formatted with rich text, and can include images and attachments. You can quickly create an article based on a ticket to help other users with the same problem.
- **News** posts are designed for announcements. They're displayed on the portal with the most recent post first, like blog entries.
- **Downloads** are files you want to make available to your users (such as electronic manuals, product brochures, or software).
- **Glossary** items are terms you want to define for users, for example because they're technical jargon or product names. When a glossary term first appears in a knowledgebase article, users can mouse over it to see the definition.

Knowledgebase

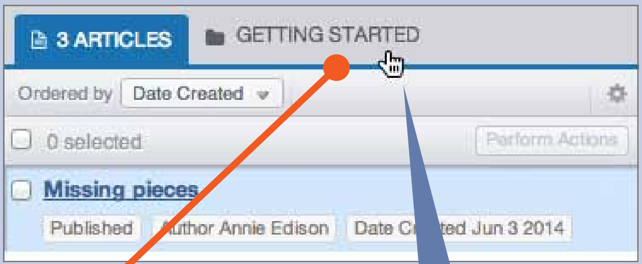


Articles that need to be written

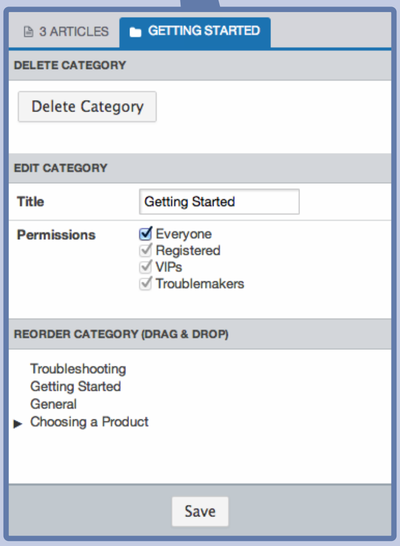
There are 6 articles in this category, with 1 at the top level and 5 in subcategories

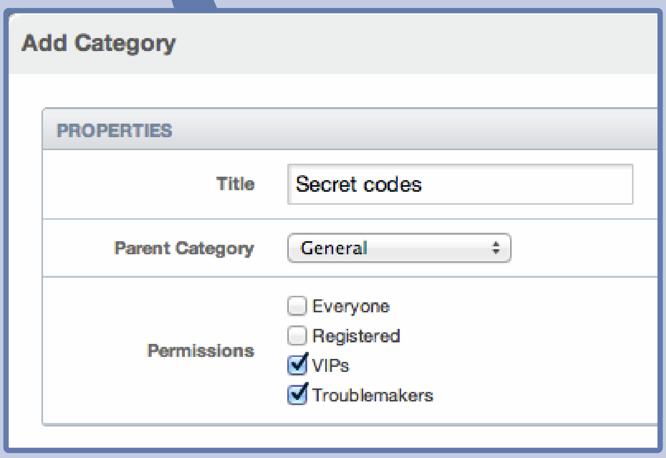
If you are viewing a ticket and decide that an article should be created to explain the problem, you can use the **Actions** button to create a **pending article** linked to that ticket.

To create a new article from scratch, use the **Add** button in the content pane.



Click on the category name in the list pane to delete or re-arrange the category and change usergroup permissions.





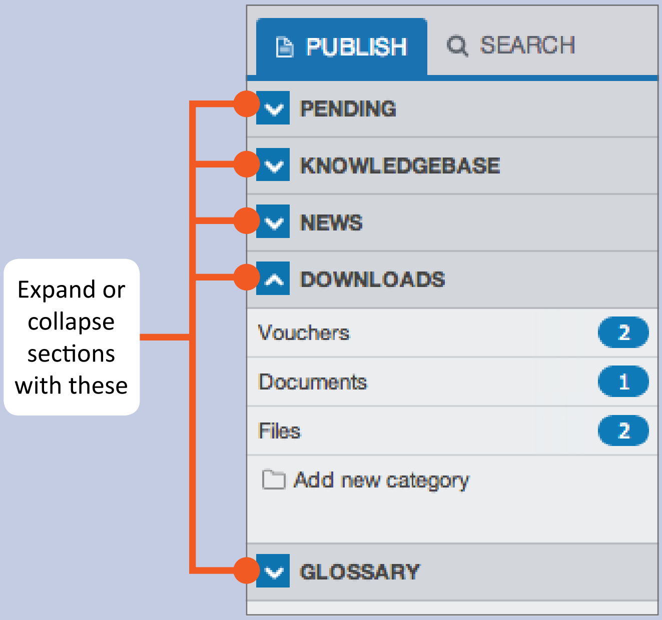
You can choose to make a category visible only to members of certain usergroups. In this example, all content within the "Secret Codes" category will be visible only to users from the "Troublemakers" and "VIPs" usergroups.

By default, a new article will be published on creation. If it's not ready yet, you can set its status as **Draft** – so it goes to the Pending section – or **Unpublished**.

Open an article in the content pane to change its status or category. An article that has been published can be set to **Archived** if it is out of date.

In the **Properties** tab of an article, you can set an automatic unpublish date. This is useful to make sure you review articles regularly or to remove aged content.

News and Downloads



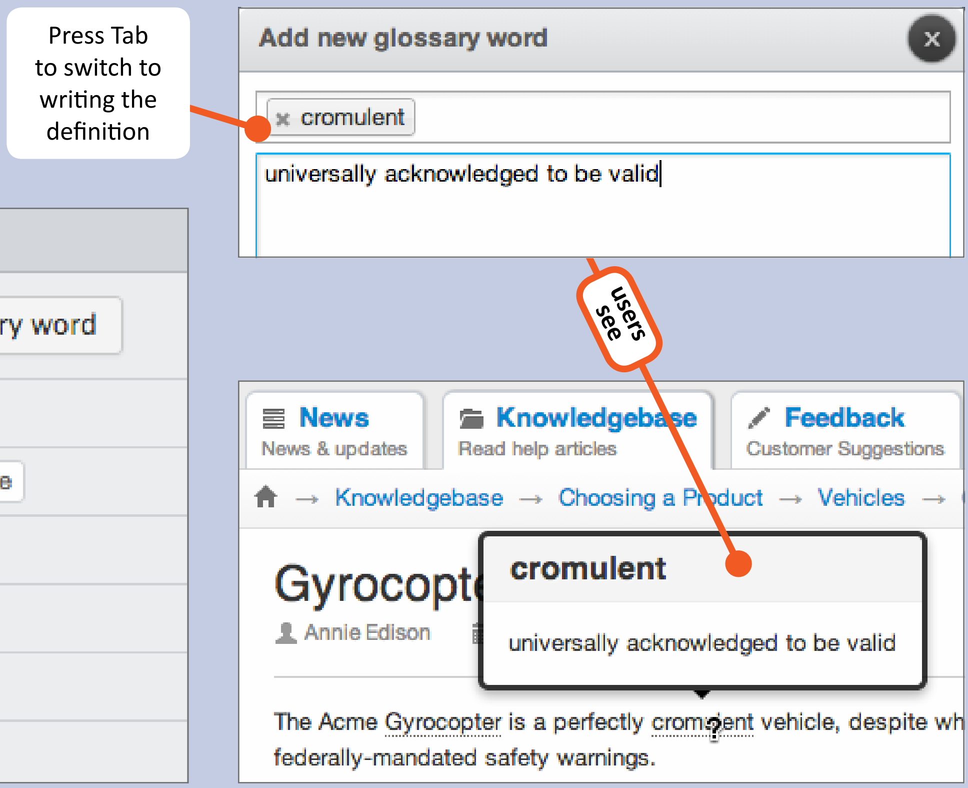
Creating News and Downloads and arranging them into categories works a lot like creating Knowledgebase articles.

News posts are displayed on the portal in reverse chronological order.

A Download is a single file with a description. You can use downloads to offer manuals, brochures, software drivers etc.

Glossary

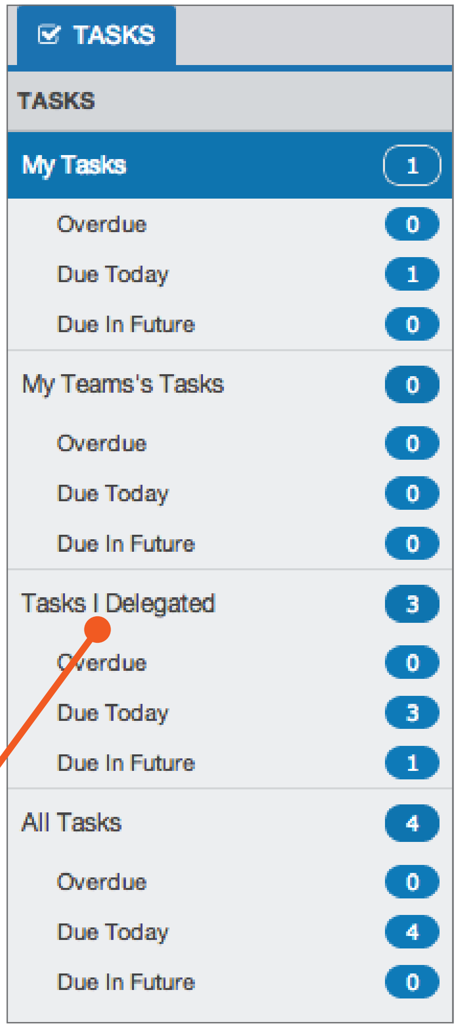
When you add a glossary word, it will be defined for users the first time it appears in a Knowledgebase article.



The Tasks App

The Tasks app allows you to track and assign agent tasks.

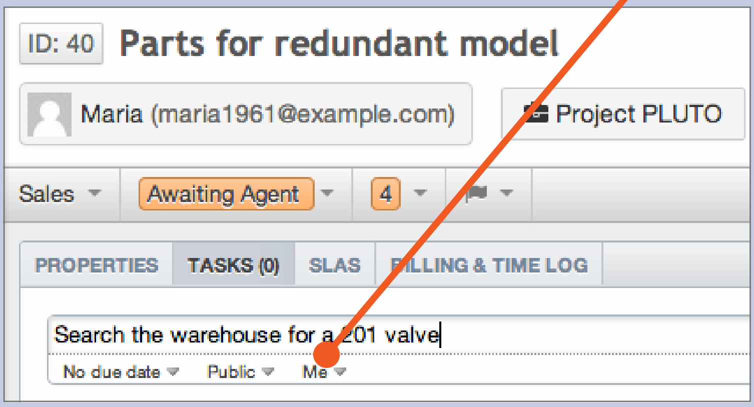
You can create a task from the + ADD button in the content pane.



Creating tasks from tickets

You can also create a task from a ticket:

Assigned agent



By default, a task you create is assigned to you, but you can assign it to other agents.

Tasks can either be **Public** (visible to all) or **Private** (visible only to you and the agent assigned the task).

Tasks you assigned to other agents

Learning more about DeskPRO

We hope you found this quick overview of the DeskPRO agent interface useful. We designed the agent interface to let you work as quickly and efficiently as possible; there are a lot more features and options for power users than we could show you here.

For an in-depth guide to using DeskPRO as an **agent**, read the **DeskPRO Agent Manual**, available as a PDF from the Downloads section of **support.deskpro.com**.

If you need to set up and configure a DeskPRO helpdesk as an **admin**, we recommend you read the **DeskPRO Admin Manual**, which is available from the same place.

Our Support Center at **support.deskpro.com** also has an extensive collection of articles which cover topics beyond the scope of the manuals, like troubleshooting specific problems, and advanced topics like the DeskPRO API.

If you run into a problem that you can't resolve with the resources above or by asking your admins, please email us at **support@deskpro.com**.

Admin: staff member within your organization who has administrator access to configure and customize your helpdesk.

Agent: staff member within your organization who uses DeskPRO to provide help.

Article: in the context of DeskPRO, an article refers to a **Knowledgebase** article.

Assignment: a ticket can be assigned to an agent or a team (or both) to specify who is responsible for that ticket.

CC: a user who is CCed on a ticket will receive notifications about its progress. The equivalent for agents is **following**.

Chat: real-time text messaging between agents and users; may be available to users from the web portal or integrated into a website.

CRM: the app used for managing users and assigning them to **organizations** and **usergroups**; short for **Customer Relationship Management**.

Downloads: files you provide to users through your web portal; e.g., software drivers or product manuals; maintained in the **Publish** app.

Feedback: crowdsourced suggestions from users submitted through your **web portal**; e.g. a feature request or new product idea.

Following: an agent added as a follower of a ticket can get notifications and see it in the **Tickets I Follow** filter; useful for keeping track of a ticket without being assigned to it.

Glossary: part of the **Publish** app used to maintain definitions of terms which are automatically displayed in **knowledgebase** articles.

Knowledgebase: part of the **web portal** which contains help **articles**.

News: part of the **web portal** which displays news posts chronologically.

Organizations: used to track the company or other enterprise a user belongs to; you can assign users to organizations using the **CRM app**, or DeskPRO can automatically assign users to an organization based on email address.

Permissions: settings which control what an agent or user can do with DeskPRO; your agent permissions are set by your admins and might, for example, prevent you deleting tickets; a user's permissions depend on their **usergroup**.

Publish: the app used to maintain content for the web portal: Knowledgebase articles, news posts, downloads and glossary entries.

SLAs: short for Service Level Agreements; goals for dealing with tickets that your helpdesk aims to meet, e.g. that you must reply to a new ticket within 4 hours; shown in the **Tickets** app.

Snippets: short pieces of text which you can quickly insert into messages to users; useful to save time entering standard greetings, phrases, "canned answers" etc.

Status: used to track who needs to act on a ticket next: **awaiting agent** means the helpdesk must do something related to that ticket; **awaiting user** means the helpdesk is waiting for the user to reply; **resolved** means the issue that ticket represents has been resolved.

Tasks: an app used to track "to-do" items for agents.

Teams: agents are grouped into teams to enable group ticket assignment.

Ticket: represents a user question, problem or complaint; can be created automatically from incoming user email, or by a user from the **web portal**, or by an agent on a user's behalf.

User: one of the people the helpdesk is trying to help.

Usergroup: users belong to usergroups which determine what they are allowed to do and see when interacting with DeskPRO; created by admins, assigned with the **CRM** app.

Web portal: the user-facing web interface of DeskPRO – can be integrated into your own website; help information on the portal is maintained using the **Publish** app.